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Description of document:	Social Security (SSA) briefing materials including internal documents related to the Presidential transition (i.e., for Agency Review Teams/Agency Landing Teams), July-December 2016
Requested date:	06-December-2016
Released date:	22-June-2018
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Source of document:	FREEDOM OF INFORMATION REQUEST Social Security Administration Office of Privacy and Disclosure 617 Altmeyer Building 6401 Security Boulevard Baltimore, Maryland 21235

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Refer to:  
S9H: AR1884

June 22, 2018

Thank you for your December 6, 2016 Freedom of Information Act (FOIA) request for a copy of the Social Security Administration (SSA) briefing materials – to include internal documents – related to the Presidential transition (i.e., for Agency Review Teams/Agency Landing Teams). Per your letter, you are primarily interested in records from July 1, 2016 to the date of your request.

We identified 119 documents responsive to your request; however, we are withholding 7 documents in full under the FOIA Exemptions 5 (deliberative process), 6 (personal privacy), and 7(E) (law enforcement techniques and procedures). Of the 112 documents (2,180 pages) saved on the enclosed CD, we have redacted portions of 25 documents pursuant to the same FOIA Exemptions: 5, 6, and 7(E).

Pursuant to the FOIA Exemption 5, we are withholding and redacting advice, opinions, recommendations, predecisional discussion, and evaluative remarks that are part of the government decision-making process. Release of such predecisional advisory communications would harm the quality of agency decision-making and the policy of encouraging frank, open discussion among agency personnel before making a decision (5 U.S.C. §552(b)(5)).

The general purposes of the deliberative process privilege are to prevent injury to the quality of agency decisions and to protect government agencies' decision-making processes. The deliberative process privilege allows agencies to freely explore alternative avenues of action and to engage in internal debates without fear of public scrutiny (*Missouri ex rel. Shorr v. United States Army Corps of Engineers*, 147 F.3d 708, 710 (8<sup>th</sup> Cir. 1998)). Exemption 5 protects not merely documents, but also the integrity of the deliberative process itself, where the exposure of that process could result in harm.

Under the FOIA Exemption 6 (5 U.S.C. § 552(b)(6)), we are withholding and redacting third parties' personally identifiable information. When we receive a request from a member of the public to release personal information about another individual from our records, we must balance the individual's privacy interest in withholding the information against the public interest in disclosing the information. We must determine whether disclosure would affect a personal privacy interest. Individuals clearly have a substantial personal privacy interest in the personal



details furnished to the government. On the other hand, the only public interest we must consider is whether the information sought would shed light on the way an agency performs its statutory duties. We may not consider the identity of the requester or the purpose for which the information is requested. While the public has an interest in knowing how SSA administers the Social Security Act, disclosing records containing personal information about named individuals would not shed light on how the agency performs its statutory duties. Therefore, disclosing this information would be a clearly unwarranted invasion of personal privacy, and the FOIA does not require disclosure.

Finally, under the FOIA Exemption 7(E) (5 U.S.C. § 552(b)(7)(E)), we are withholding and redacting information related to law enforcement techniques and procedures under. Exemption 7(E) exempts from mandatory disclosure records or information compiled for law enforcement purposes when production of such records “would disclose techniques and procedures for law enforcement investigations or prosecutions, or would disclose guidelines for law enforcement investigations or prosecutions if such disclosure could reasonably be expected to risk circumvention of the law.”

The enclosed CD is automatically encrypted. We will send you the password in a separate letter.

If you have questions, or would like further assistance with your request, you may contact our FOIA Public Liaison by email at [FOIA.Public.Liaison@ssa.gov](mailto:FOIA.Public.Liaison@ssa.gov); by phone at 410-965-1727, by choosing Option 2; or facsimile at 410-966-0869.

You may also contact the Office of Government Information Services (OGIS) at the National Archives and Records Administration for dispute resolution services. OGIS is an entity outside of SSA that offers mediation services to resolve disputes between FOIA requesters and Federal agencies. The contact information for OGIS is as follows: Office of Government Information Services, National Archives and Records Administration, 8601 Adelphi Road – OGIS, College Park, MD 20740-6001; email at [ogis@nara.gov](mailto:ogis@nara.gov); telephone at 202-741-5770; toll-free at 1-877-684-6448; or facsimile at 202-741-5769.

If you disagree with this decision, you may file a written appeal with the Executive Director for the Office of Privacy and Disclosure, Social Security Administration, G-401 WHR, 6401 Security Boulevard, Baltimore, Maryland 21235. Your appeal must be postmarked or electronically transmitted to [FOIA.Public.Liaison@ssa.gov](mailto:FOIA.Public.Liaison@ssa.gov) within 90 days of the date of our response to your initial request. Please mark the envelope or subject line with “Freedom of Information Appeal.”

Sincerely,



Monica Chyn  
Acting Freedom of Information Act Officer

Enclosure



## **Strengthening the SES Bench Survey**

Executive Summary and Frequency Report

March 2015

**Report Preparation:** (b) (6)

**Transition Team Member Document—Non-Public Information. This document may be disclosed to Authorized Transition Team Members only.**

**Note: In the comments in Tab A, individuals' names have been redacted where "xxxxx" is shown.**

# **Executive Summary**

## **Background**

The Office of Retirement and Disability Policy (ORDP) requested the assistance of the Office of Measurement, Evaluation, and Community Outreach (OMECO) to conduct an online survey of SES-eligible SSA employees nationwide. The survey collected feedback about barriers employees experience or perceive about filing for SES positions, particularly the SES Candidate Development Program (CDP).

ORDP sent a survey invitation to SES eligible employees (GS-14s and above as well as GS-13s who have completed a one-year temporary promotion at the GS-14 level). The survey was open from February 11 to February 27. There were 1,624 responses to the survey.

## **Goals and Objectives**

The purpose of the online survey was to:

- Strengthen the SES Bench
- Prepare for succession management
- Identify challenges to SES selection
- Identify employee perceptions of the CDP

## **Findings**

The Strengthening the SES Bench Survey asked respondents to express their concerns about filing for the SES CDP.

### **Demographics**

The survey responses included 1,557 respondents who said they did not apply for the most recent SES CDP. Most of the respondents were at the GS-14 level (72.8%) and most (75.0%) said they hold a supervisory or management position currently.

About 47.1% of respondents said they have worked at SSA for 21 or more years. Another 34.7% said they worked at SSA for 11-20 years.

Field employees accounted for 33.8% of respondents (DCO field and HQ employees totaled 39.5% of the responses). DCS and DCDAR represented 14.0% and 12.8% of responses respectively.

Survey respondents were 54.6% female.

White employees represented 70.3% of the respondents and 91.0% were non-Hispanic. Bachelor or Graduate degrees were held by 86.4% of respondents.

### **Issues and Concerns**

When asked how familiar they were with the SES CDP, 21.3% said they were very familiar with it and 63.6% said they were somewhat familiar with it.



When asked if an SES member had ever explained the SES to them, 33.8% said they had. In addition, 34.7% said that an SES member had told them to consider filing for the CDP or an SES position. In contrast, 8.0% said they had been discouraged to apply for the CDP or an SES position.

When asked if they had ever applied for an SES CDP or an SES position, 8.6% of respondents said they had. When asked if they plan to apply at some point in the future, 17.1% said they would. Another 50.6% said they were not sure if they would ever apply, while 32.2% said they would not.

Respondents were provided a list of 17 possible issues that could affect their decisions to not apply for the most recent CDP and asked to rate them on a 5-point scale of influence. The most influential factors identified (as measured by the mean score) were work/life balance concerns (mean score 2.55), the mobility requirement (mean score 2.53), and being happy in their current role at SSA (mean score 2.25).

An open-ended question asked for other reasons they did not apply for the last SES CDP. Respondents did not limit their reasons to issues other than the 17 previously listed, but they did provide much more detail. The 794 verbatim responses were categorized and sorted into 23 unique categories and an “Other” category. The most frequently occurring category, with a frequency of 13.7%, is called “Poor Impressions.” Respondents were very open about their very negative impressions of the program. The other most frequently cited categories were “Age/Near Retirement” (11.1%) and “Selection Bias” (10.5%).

A final question asked respondents for anything else they would like to say about why they did not apply. The 412 responses were similar to the question above, but the frequency of occurrence of the categories was different. There were 14 unique categories and an “Other” category. In this question, the most frequent responses were Work/Life Balance (12.4%), Mobility (11.7%), Lack of Information (11.2%), and Poor Impressions (10.0%).

This survey indicates that negative opinions about the SES program are common. Work needs to be done to create a better impression of the process and position. In particular, we recommend:

- Educating employees about the SES program
- Improving impressions of the SES Bench
- Improving impressions of the SES CDP selection process.

All responses to the open-ended questions in the survey are provided in Tab A. The data is categorized and presented verbatim so that no bias is introduced to their answers.



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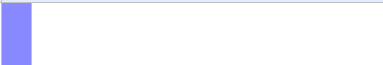
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## Strengthening the SES Bench Frequency Report

### *Did you apply for the most recent SES CDP post? (All Respondents)*


*(Respondents could only choose a **single** response)*

Response	Chart	Frequency	Count
Yes		4.1%	67
No		95.9%	1557
		Valid Responses	1624
		Total Responses	1624

**The following survey results include only respondents who did not apply for the most recent SES CDP.**




### *Was your most recent performance rating: (Note: ALJs do not have performance ratings, so they did not get this question.)*

*(Respondents could only choose a **single** response)*

Response	Chart	Frequency	Count
Outstanding (Level 5)		41.6%	626
Excellent/Successful (Level 3 or 4)		58.4%	878
Not successful (Less than Level 3)		0.0%	0
		Valid Responses	1504
		Total Responses	1505



**How familiar are you with the SES CDP?**

*(Respondents could only choose a **single** response)*

Response	Chart	Frequency	Count
Very familiar		21.3%	332
<b>Somewhat familiar</b>		<b>63.6%</b>	<b>990</b>
Not at all familiar		15.1%	235
		Valid Responses	1557
		Total Responses	1557


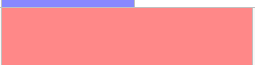
**Has an SES member ever explained the SES to you?**

*(Respondents could only choose a **single** response)*

Response	Chart	Frequency	Count
Yes		33.8%	526
<b>No</b>		<b>66.2%</b>	<b>1031</b>
		Valid Responses	1557
		Total Responses	1557



**Has an SES member ever told you that you should consider applying for the CDP or an SES position?**

*(Respondents could only choose a **single** response)*

Response	Chart	Frequency	Count
Yes		34.7%	540
<b>No</b>		<b>65.3%</b>	<b>1017</b>
		Valid Responses	1557
		Total Responses	1557

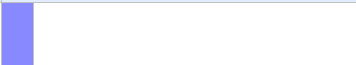

**Has an SES member or other manager ever discouraged you from applying for the CDP or an SES position?**

*(Respondents could only choose a **single** response)*

Response	Chart	Frequency	Count
Yes		8.0%	124
No		<b>92.0%</b>	<b>1433</b>
		Valid Responses	1557
		Total Responses	1557


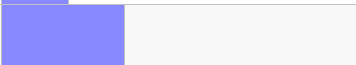
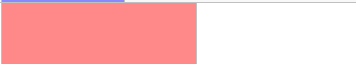
**Have you ever applied for the SES CDP or an SES position?**

*(Respondents could only choose a **single** response)*

Response	Chart	Frequency	Count
Yes		8.6%	134
No		<b>91.4%</b>	<b>1423</b>
		Valid Responses	1557
		Total Responses	1557

**Do you plan to apply for the SES CDP or an SES position at some point in the future?**

*(Respondents could only choose a **single** response)*

Response	Chart	Frequency	Count
Yes		17.1%	267
No		32.2%	502
Not sure/Don't know		<b>50.6%</b>	<b>788</b>
		Valid Responses	1557
		Total Responses	1557



***To what degree did any of the following issues influence your decision to not apply for SSA's most recent SES CDP? (Data sorted by mean score)***  
*(Respondents could only choose a **single** response for each topic)*

		Not a factor	Somewhat Influential	Very influential	Extremely Influential	Not sure/Don't know	Total	Mean
<b>Work/Life balance concerns</b>	Count	409	307	293	<b>515</b>	33	<b>1557</b>	<b>2.55</b>
	% by Row	26.3%	19.7%	18.8%	<b>33.1%</b>	2.1%	<b>100.0%</b>	
<b>Requirement to be mobile</b>	Count	438	283	246	<b>548</b>	42	<b>1557</b>	<b>2.53</b>
	% by Row	28.1%	18.2%	15.8%	<b>35.2%</b>	2.7%	<b>100.0%</b>	
Happy with current role	Count	<b>502</b>	375	327	318	35	<b>1557</b>	<b>2.25</b>
	% by Row	<b>32.2%</b>	24.1%	21.0%	20.4%	2.2%	<b>100.0%</b>	
Expectation to change positions as needed	Count	<b>724</b>	333	212	226	62	<b>1557</b>	<b>1.88</b>
	% by Row	<b>46.5%</b>	21.4%	13.6%	14.5%	4.0%	<b>100.0%</b>	
Concerns over the selection process	Count	<b>820</b>	260	163	221	93	<b>1557</b>	<b>1.74</b>
	% by Row	<b>52.7%</b>	16.7%	10.5%	14.2%	6.0%	<b>100.0%</b>	
Application process overly complicated, long, or burdensome	Count	<b>652</b>	364	194	179	168	<b>1557</b>	<b>1.72</b>
	% by Row	<b>41.9%</b>	23.4%	12.5%	11.5%	10.8%	<b>100.0%</b>	
Inadequate guidance surrounding application and/or selection process	Count	<b>800</b>	323	183	160	91	<b>1557</b>	<b>1.68</b>
	% by Row	<b>51.4%</b>	20.7%	11.8%	10.3%	5.8%	<b>100.0%</b>	
Lack of mentorship	Count	<b>911</b>	253	151	163	79	<b>1557</b>	<b>1.62</b>
	% by Row	<b>58.5%</b>	16.2%	9.7%	10.5%	5.1%	<b>100.0%</b>	
Pay/benefits not commensurate with responsibilities	Count	<b>902</b>	260	136	147	112	<b>1557</b>	<b>1.55</b>
	% by Row	<b>57.9%</b>	16.7%	8.7%	9.4%	7.2%	<b>100.0%</b>	
		Not a	Somewhat	Very	Extremely	Not sure/Don't	Total	Mean





		factor	Influentia	influentia	Influentia	know		
Not interested in SES responsibilities	Count	<b>921</b>	267	122	142	105	<b>1557</b>	<b>1.53</b>
	% by Row	<b>59.2%</b>	17.1%	7.8%	9.1%	6.7%	<b>100.0%</b>	
Not sure my management will support me	Count	<b>994</b>	197	109	163	94	<b>1557</b>	<b>1.52</b>
	% by Row	<b>63.8%</b>	12.7%	7.0%	10.5%	6.0%	<b>100.0%</b>	
Too much paperwork necessary to document performance	Count	<b>844</b>	317	137	109	150	<b>1557</b>	<b>1.49</b>
	% by Row	<b>54.2%</b>	20.4%	8.8%	7.0%	9.6%	<b>100.0%</b>	
Not ready professionally	Count	<b>1048</b>	274	113	78	44	<b>1557</b>	<b>1.44</b>
	% by Row	<b>67.3%</b>	17.6%	7.3%	5.0%	2.8%	<b>100.0%</b>	
Lack of prior development program experience	Count	<b>1075</b>	257	99	65	61	<b>1557</b>	<b>1.38</b>
	% by Row	<b>69.0%</b>	16.5%	6.4%	4.2%	3.9%	<b>100.0%</b>	
Inadequate family support	Count	<b>1111</b>	202	93	107	44	<b>1557</b>	<b>1.37</b>
	% by Row	<b>71.4%</b>	13.0%	6.0%	6.9%	2.8%	<b>100.0%</b>	
It takes too long to get certification	Count	<b>996</b>	218	90	65	188	<b>1557</b>	<b>1.26</b>
	% by Row	<b>64.0%</b>	14.0%	5.8%	4.2%	12.1%	<b>100.0%</b>	
Would apply for an SES position but do not need the development program	Count	<b>1146</b>	135	53	60	163	<b>1557</b>	<b>1.17</b>
	% by Row	<b>73.6%</b>	8.7%	3.4%	3.9%	10.5%	<b>100.0%</b>	

## Demographics

The typical respondent to this survey is white, a GS-14, currently in a supervisory or management position, and has a Bachelor or Graduate degree.



### Please select your pay level.

(Respondents could only choose a *single* response)

Response	Chart	Frequency	Count
GS-13 with one year experience in a GS-14 position		0.4%	6
<b>GS-14</b>		<b>72.8%</b>	<b>1133</b>
GS-15		23.4%	365
AL or AA (Select this category if you are an ALJ or AAJ)		3.4%	53
None of the above		0.0%	0
		<b>Valid Responses</b>	<b>1557</b>
		<b>Total Responses</b>	<b>1557</b>

### Are you currently in a supervisory or management position?





(Respondents could only choose a *single* response)

Response	Chart	Frequency	Count
<b>Yes</b>		<b>75.0%</b>	<b>1168</b>
No		25.0%	389
		<b>Valid Responses</b>	<b>1557</b>
		<b>Total Responses</b>	<b>1557</b>







### **How long have you worked for SSA?**

*(Respondents could only choose a **single** response)*

Response	Chart	Frequency	Count
0-5 years		4.5%	70
6-10 years		13.7%	213
11-20 years		34.7%	541
<b>21+ years</b>		<b>47.1%</b>	<b>733</b>
		Valid Responses	1557
		Total Responses	1557

### **How long have you worked for the federal government?**

*(Respondents could only choose a **single** response)*

Response	Chart	Frequency	Count
0-5 years		2.8%	44
6-10 years		11.8%	183
11-20 years		31.3%	488
<b>21+ years</b>		<b>54.1%</b>	<b>842</b>
		Valid Responses	1557
		Total Responses	1557

***Please identify your component.***

*(Respondents could only choose a **single** response)*

Response	Chart	Frequency	Count
DCO - Field		33.8%	527
DCS		14.0%	218
DCDAR		12.8%	200
DCBFQM		9.8%	152
OGC		8.7%	136
DCO - HQ		5.7%	88
DCRDP		5.2%	81
DCHR		3.7%	57
OIG		3.1%	49
DCCOMM		1.0%	16
DCLCA		0.8%	13
OCACT		0.5%	8
OC		0.4%	6
OCSO		0.4%	6
		Valid Responses	1557
		Total Responses	1557

### *Are you male or female?*

*(Respondents could only choose a **single** response)*

Response	Chart	Frequency	Count
Male		45.4%	702
<b>Female</b>		<b>54.6%</b>	<b>845</b>
Not Answered			10
		Valid Responses	1547
		Total Responses	1557







### *Are you Spanish, Hispanic, or Latino?*

*(Respondents could only choose a **single** response)*

Response	Chart	Frequency	Count
Yes		9.0%	139
<b>No</b>		<b>91.0%</b>	<b>1397</b>
Not Answered			21
		Valid Responses	1536
		Total Responses	1557






**Are you White, Black or African American, American Indian, Asian, Native Hawaiian or Other Pacific Islander, or some other race?**

*(Respondents could only choose a **single** response)*

Response	Chart	Frequency	Count
<b>White</b>		<b>70.3%</b>	<b>1061</b>
Black or African American		18.7%	283
American Indian or Alaska Native		0.5%	8
Asian		3.5%	53
Native Hawaiian or Other Pacific Islander		0.3%	4
A mix of two or more races listed above		3.4%	52
Other		3.2%	49
Not Answered			47
		<b>Valid Responses</b>	<b>1510</b>
		<b>Total Responses</b>	<b>1557</b>



**What is the highest level of school you have completed or the highest degree you have received?**

*(Respondents could only choose a **single** response)*

Response	Chart	Frequency	Count
Less than high school degree		0.0%	0
High school degree or equivalent (e.g., GED)		2.1%	32
Some college but no degree		8.9%	138
Associate degree		2.7%	42
<b>Bachelor degree</b>		<b>49.1%</b>	<b>764</b>
Graduate degree		37.3%	581
		<b>Valid Responses</b>	<b>1557</b>
		<b>Total Responses</b>	<b>1557</b>

**In addition to the highest degree you identified above, do you have any additional certifications (for example, a CPA)?**

*(Respondents could only choose a **single** response)*

Response	Chart	Frequency	Count
Yes		17.1%	266
No		82.9%	1291
		Valid Responses	1557
		Total Responses	1557



## **Strengthening the SES Bench Survey**

Verbatim Question Report

March 2015

Report Preparation: (b) (6)

# Strengthening the SES Bench – Verbatim Question Report

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## Strengthening the SES Bench – Verbatim Question Report

### Please list any certifications you have.

( Note: Respondents could enter up to three certifications. Combined response categories appear in one table.)

(Respondents were limited to **brief** text responses)

Response	Frequency	Count
Attorney	27.9%	99
Systems/Technology	17.2%	61
Project Manager	11.0%	39
Accounting	7.6%	27
Other	5.1%	18
Leadership	2.8%	10
Management	2.3%	8
Contracts	2.3%	8
Mediator	2.3%	8
Degree	2.3%	8
Financial Manager	2.3%	8
Medical	2.0%	7
Actuary	1.7%	6
Paralegal	1.4%	5
Teaching	1.4%	5
Authorization Professional	1.1%	4
Human Resources	1.1%	4
Sports	1.1%	4
Counselor	1.1%	4
College Coursework	0.8%	3
Real Estate	0.8%	3
Fraud Examiner	0.8%	3
Federal	0.8%	3

Auditor	0.8%	3
Privacy	0.8%	3
Translator	0.6%	2
Public Relations	0.6%	2
<b>Total</b>	<b>100.0%</b>	<b>355</b>

## What other issues, if any, influence your decision to not apply for the most recent SES CDP or a future SES CDP?

(Frequency table of categorized verbatim responses)

(Respondents were limited to **brief** text responses)

Response	Frequency	Count
Poor Impressions	13.7%	109
Age/Near Retirement	11.1%	88
Selection Bias	10.5%	83
Work/Life Balance	8.7%	69
Mobility	7.9%	63
Lack of Information	5.8%	46
Process	5.4%	43
Not Worth It	5.4%	43
Political Environment	5.2%	41
Management Support	3.7%	29
Unlikely to be Selected	3.1%	25
Pathing	2.5%	20
Timing	2.4%	19
Placement	2.0%	16
New Job	1.6%	13
Other	1.6%	13
Mentorship	1.5%	12
Not Interested	1.5%	12
Time Involved	1.4%	11
Like My Job	1.1%	9
Education	1.0%	8
Competition	1.0%	8
Health Issues	0.9%	7
Not Eligible	0.9%	7
Total	100.0%	794

What other issues, if any, influence your decision to not apply for the most recent SES CDP or a future SES CDP?

Response
<i>Poor Impressions</i>
changing internal environment
Current leadership landscape too uncertain
impact of budget constraints on ability to achieve expectations
current direction agency is headed
Distrust of SSA's current leadership
I prefer to deal with reality; must tell the emperor when he has no clothes.
ambitious, back-stabbing, climb to the toppers
An SES position should be encouraged to take risk to make operations better not be so concerned that a risk could cost them their career.
Appears that you have to be a sycophant to be recommended
Arriving at this Agency 15 yrs ago, I was excited about going as far as I could go, including SES. But several unexplained experiences from decisions, actions, or statements by SESers have caused me to question whether I want to assume the character.
At SSA, SES members are the problem, not the solution.
Attitudes & behavior of current CDP in my component.
Based on past selections to the program, it does not appear to be based on knowledge, qualifications, or experience
Caliber of SSA SES corps is not inspiring
concern about ability to work effectively with other SES execs who do not want to hear differing opinions
concern about current SES execs appearance of lack of focus on mission and more focus on ego
concern about the current SES core's level of leadership/competence
Credibility of SES selection process based on selection of some current SESers
Current SES staff say program is not working well, and they cannot recommend it.
Current SESer complain about restrictions
Current SESers are poor leaders/behavior does not garner respect
Current SESers in our Region aren't role models I would care to follow
Discouraged by current caliber of SES corps.
Do not believe the agency wants people who will positively change things, they want "yes men"
Do not want to sell my soul to SSA

Doesn't appear to be based on competence
Don't believe in the system and selection process
have heard many SES members complain, but none praise, the SES experience
I do not respect the SES executives that run my component. They disrespect current processes and do not take the time to learn how we do business before making radical changes. I do not want to work the way they work.
I do not think SSA senior leaders are leading the agency in a good direction and I would not want to be forced to emulate them.
I find a lack of integrity to subordinate mgrs, by telling them to hold others accountable, but not supporting them when there is a formal challenge. I back my supervisors, and SESers don't.
I find that many of the SES don't take their position serious
I have little respect for many of the SESers I've dealt with.
I see the environment in which the SES function, it is dysfunctional and cronyism is rampant.
lack of confidence in current management to make fair selections
Lack of confidence in current SSA leadership on all levels
lack of executive level leadership demonstrated
Lack of professionalism among executives
Lack of respect for and observed bad behavior of some existing Execs.
Lack of strong role models among agency SES
Many SES employees seem harried and unhappy
Many, but not all, SES executives that I am familiar with are more concerned with their own advancement than service delivery. I want to make a real difference in the lives of the people we serve, not personally gain from service.
My experience with SES corp
Not pleased with the way SESers see themselves
Of the SESers I have worked with, I find that the SES standards motivate SESers to act primarily from self-promotion and not really care about how their decisions impact subordinate mgrs - many hours are devoted to enhance SES profile, but no benefit.
Past Selections
Personal experiences w mgmt./SES personnel
Privileged demeanor of some current SES members
Concerns about predictable and consistent expectations from the top
External mandates coming to the agency have caused Executive Management to say "yes" to everything and not take a close look at what is right and how to best manage the workload within SSA
having to work closely with political appointees
Lack of focus on the real needs & work of the agency
Lack of follow-up of those in the position

lack of good role models
Lack of partnership/cooperation from other SESrs
Limited confidence in current executive team.
many SES are smart but little leadership experience
My current SES/xxxxx has told us that he takes no interest in the work my staff performs. Therefore, we do not feel that he would supporting any of us for whatever developmental program we would apply, as it would require effort on his part.
Not persuaded true diversity is valued and respected
Numerous conversations among peers, the consensus is, in the beginning we were eager to get into a GS-15 or SES, however after a few years in middle management, there is no longer an interest in SES. The leadership environment is not collaborative.
Perception
Recent SES reassignments/retirements etc. seem to indicate a culture of tension within the agency. The culture does not seem positive or productive.
Seeing some of the candidates that are selected - they may appear to be effective from above, but as their subordinate I feel they are not good leaders
SES cadre are not people I want to work with.
SES infighting / politics is discouraging
SES position has become more focused on saving their job than ensuring the right thing is done for the agency/people they serve.
SES put their own career advancement above all else.
SES role is like a concierge, not a leader.
SES staff seem to be more interested in advancing themselves rather than the agency
SES/Management usually turns out to be adult babysitting.
SESers appear to function as managers not as leaders with vision
SESers too steeped in maintaining the status quo
Several poor quality SES give the position a bad reputation; particularly when it comes to dishonesty
some current SES employees are barely competent
Some in the SES program aren't very good managers - seems like when some fail technical roles - they try the management ladder leading to SES
SSA current direction
SSA current management
SSA does not have a very good succession plan.
SSA SES members are not impressive, or even competent.
SSA's SES culture
Tainted perspective of SES- focus on individual goals and not those benefitting the entire agency



Talent level of many SES selections of the past few years seems marginal. Not a group I aspire to belong to.
The behavior of some current SES
The manner in which the most recent SES program was shared on the all Managers call was very discouraging for many. The perceived negatives were mostly shared and none of the positives of being selected for the program.
The process has been explained by others as overly cumbersome
The quality of SSA's management is not known to be the best in the federal government.
The SES candidates are only interested in getting permanent positions. They do not focus on core work. I do not want to be peers with people who are so focused on their own egos, positions, and status.
The SES program forces non-supervisory GS grade employees to write SESers' achievements. SESers forcible take others work as their own. SES management cannot stand on its own successes; they are elevated on the backs of lower grades.
The SES program punishes those by forcing them to accept an antiquated management doctrine which is then exhibited upon the body of employees who they manage. Your practices and styles are outdated and not in par with industry standards.
to demoralized by SES in ORD
too jaded by the process
too many SESers are idle
Tremendous lack of control at the executive level, very little actual authority to make decisions
untrustworthiness required for success
viewing other non-substantive SES Leaders
Workloads within the agency have gotten unmanageable because of Executive Managements' inability to push back based on appropriate prioritization, so executive management is being held accountable to deliver without a balance of staff to support the work
seems like unable to say no or to disagree and be true to yourself
SES executives not held accountable for poor results
The expectation to need to be a GS-15 first, at least at SSA HQ.
There are too many executives now
Too many supervisor lack business knowledge, and technology skills to understand who is good.
too much change all the time
Too removed from real work.
was told if not selected for SES after completing development program would be fired
do not respect senior leadership
Don't respect a lot of the SES people
Have little respect for SES process
lack of respect for how it's administered at SSA

lack of respect for those in SES positions
<i>Age/Near Retirement</i>
Age
Age
Age
Age
Age
Age
Age (37) + work/life balance; I feel I still have enough time to do this in the future; no rush but preparing for it.
Age (61) and health
age and years to retirement
Current age
my age
my age
My relatively advanced age
42 years of employment looking to retirement
44 years with SSA
About to retire
Approaching Retirement
Close to end of career.
Close to retirement
Close to retirement
close to retirement
Close to retirement
close to retirement
considering retirement
Currently close to retirement
Expect to retire in 2015

expect to retire within next couple of years
I am approaching retirement age
I am in my 39th year of service
I am less than 5 years from retirement.
I am nearly 65 and anticipate retiring within the next 2 years.
I am now to close to retirement to consider
I am planning to retire next year
I am retirement age- not worth it at this point
I am retirement eligible and I believe that fact can influence the selection process.
I am retiring at the end of the year
I am retiring soon
I am retiring within a year
I expect to retire within the next 6 years.
I plan to retire this year.
I'm probably going to retire in a year or two.
I'm within 2 years of retirement
Impending retirement (within 2 years)
Near retirement
near retirement
nearing age 70 with almost 45 years of service. Expect to retire within 2 years
nearing end of career
Nearing Retirement
now close to retirement
Plan on retiring in 24 months
Planned retirement after 40 years service 07/15
Planning to retire
Planning to retire in 2-3 years
plans to retire soon
possible retirement

Ready to retire
Ready to retire.
Retirement
Retirement
retirement expectations in next 5 years
Retirement imminent
Retirement prep - 40 years
Retirement ready now.
Retirement within 2 years
retirement within 5 years
Retiring 04/30/2015
Retiring relatively soon
To close to retirement
Too close to retirement
too close to retirement
too close to retirement
Too close to retirement
too close to retirement by the time I found out about it
Too late in career, past retirement age
Too late in my career to participate.
too near retirement
Very close to retirement
will be retiring
Will retire soon
will retire soon
will retire this year
Will retire within next 2 years
will retired in a couple of years
my next career goal is retirement

Not learning the ins and outs of SES & application process until I was almost in my retirement years
Opportunity coming too late in career
time left in career
not sure how much longer I will work before I retire
<i>Selection Bias</i>
Age appears to be a deterrent
Not enough younger GS 15's to the program
age bias in selection process
Age discrimination
Age discrimination
Ageism
focus on youth for hiring and promotions
only 1 or 2 candidates over 50 selected
When I applied before, the XO pulled me aside and told me that because I had too many years of service and could retire soon, I would not be considered. So even though I had all the points needed, I was not selected to be in the program.
I have been in my position for nearly 10 years. I have managed Executive Oversight projects at SSA and other large-scale projects. I am told how knowledgeable I am, but I cannot break through to the next level. I have no doubt that my age factors in.
Race
Race -- geared towards Caucasians; the lack of diversity and inclusion of Asian representation in the program is glaringly offensive and disappointing
lack of Hispanic SES women in top positions
I'm an ethnic minority and do not believe I will receive a fair chance
Entrance into the program is quite frequently based on the applicants' "associations" and not "qualifications." Although this has been rampant in ODAR, I hear it definitely happens in other DC components as well.
I have applied for 11 vacancies in the past year and only interviewed for 2 jobs-both were selections of friends, personal relationships--all vacancies should be selected by outside contractors to avoid cronyism
Optics: There is the sense that optics dictates selection regardless of merit.
Agency only seems to be selecting diverse candidates
appearance candidates are pre-selected
Appearance of favoritism
Appears they are looking for specific individuals
As with the findings of the recent MSPB report, preselection/favorites is prevalent

Best candidate not always picked
Candidates seem preselected
CDP selections seem to have bias on specific factors
Component candidate recommendations seem to be rooted in favoritism
Cronyism
Culture of nepotism
Ambiguity and inconsistency in the certification process. Those that are favored or well liked seem to receive priority certification and assistance and those that are just as deserving but not in the limelight are left to their own devices.
Current management team has pre-determined who will and will not be included based upon friendships and relationships
executives currently grooming people they want to promote to SES/Executive positions, non-competitive informal process which dominates over the competitive one
Extreme Favoritism at SSA
favor certain people
Favoritism
Favoritism
favoritism from AC and DC
History of questionable selections for prior CDP classes
HR should seek out high performers, supervisory endorsements are too political
I do not think the program is especially interested in an aging, white, Jewish male.
I think the Assessment Center is biased.
it seems to be pre-selected
Not a member of the "executive clique"
Not on the most favored list of current SESers
Not sure applicants are selected on abilities
Perceived preselections already made
Pre-selection
Preselections
Seems biased
seems too much 'in-breeding'
Selection criterion is not based upon merit
selection process fairness

Selection process is not objective
selection process political
Selection seem weight to certain individuals.
selections process not fair
SESCDP favors candidates on the East coast as more opportunities are located in that area.
subjective selection criteria
Fairness
Have seen a lot of cronyism.
i am white male and therefore not eligible based on not being politically connected
I don't believe that the best candidates are selected
I was indirectly told that they are not interested in hiring white males
In my organization, I do not feel that choices to promote people to management positions are done based of the best qualified candidate, but more for internal political reasons.
It appears that most executives already choose who they want to put forward in the program. then they move that person forward by bringing them up to the 9th floor to do briefings so they can get the face time. Being afforded the opportunity is not equal.
It is not open to people who do not come from a field office
Leadership had already picked their favorite
Leadership qualities are not used to identify candidates, cronyism, and personality supersede courage and strategic thinking. Lack of courage hides under the guise of political savvy
Management already knows who they want for those positions; no sense applying if you're not one of the people they are encouraging to apply.
Management selects who they want to participate
Many "appear" to be pre-selected based on their sponsorship.
Not convinced it is really an open opportunity. It seems like some folks are "sponsored" and then are selected. I have been told that they also receive help with the application process. So there seems to be a lack of fair and open competition.
Perceived extreme unlikelihood of being selected
prejudice against people with experience
I am smart enough and a good leader, but I lack political savvy - I think this agency looks for yes people and shies away from those who are honest and state things as they see them
Perception that agency/COSS does not look favorably/value DCS employees
questionable current selectees qualifications
Seems geared towards people who are ALREADY in a management position, and as a result, non-management candidates, who are interested in applying but lack prior management/supervisory experience, have no chance. So, in essence, it is very unfair.
Too many younger, more "favored" candidates



Too much emphasis on diversity in selections
Upper Management plays favorites
my agency does not promote based on quality of work
SES collaboration
Generational differences between selecting officials and myself
<i>Work/Life Balance</i>
uncertainty of assignments and having to change jobs/locations based on needs of program would have a negative impact on my family/children
Late in my career, sacrifice away from family not worth it for CDP
Spouse also career track oriented - need to account for her professional development when applying for positions
spouse disabled/can't have unpredictable schedule
Taking care of ill parent
The need to take care of a disabled child does not permit me to be away from home for extended periods of time. Absent that factor, I would have applied.
Understanding that you can be placed anywhere in the country as needed - family first - important consideration
Very interested in the remote training at Harvard, etc...just can't leave my children.
Working spouse.
4 very, very ill parents that required my time for caregiving; however, sadly the death of two of the ill parents make me hope that it is not too late to consider future SES.
Aged parents have increased needs
being away from family for four week training
Cannot be separated from children during CDP assignments
Care of my children
caring for a critically ill family member
CDP not family friendly
Elder care
Eldercare
Family
Family
Family
family life - young children

Family responsibilities
family/home constraints and obligations
Have elderly parent and mentally challenged sister that i am responsible for
Have young children and want to be home
having 2 young children
i have a child at home who needs me daily
I have an 11th grader
I have an 8th grader
I want to wait until my children are grown
I'm a single parent with sole responsibility over my son. The time/location to where I am must be placed has to allow me to drop/pick him up timely. I do not see this as feasible under the program.
Impact on family with children still in school
My family comes first, i devote enough time to work. Can't commit any more time.
My family situation is not highly mobile due to having school aged children
New family
Previous years, 1 mo away from family. i have a toddler. if i could bring him and place in daycare, my interest would greatly increase
Recent changes to family life (young children at home)
Requirement to spend as much as 6-months away from family during CDP rotation
Requirements to travel to other locations for assignments. I have a young family and that does not work for me.
residential training program after selection would be burden on family
School age children.
SES does not appear to be family-friendly; very demanding; assumed to be long hours - on call 24-7
Single parent
Single parent with teenage daughter and do not have family close by to help with her care since you have to be mobile during program
small children at home
Young children
Young Children
Young children
Young Children - want stability for them
Young children at home

Young children at home; absence would create hardship on family
Young kids
husband's work schedule
Leaving Family for A Year would be tough
Minor child and husband at home
Need for flexibility; such as situational telework for SES. I have very young children and no support network, so all delays, sick days, etc...fall on me.
not family friendly
Work/life balance
Work/Life balance
work/life balance
Work/life balance
Work/Life balance concern
I do not think SES executives are allowed to have work/life balance. The executive who claim to have a work/life balance are probably people who enjoy working nights and weekends, rather than having personal time.
It appears one's entire life is consumed by work, including evenings and weekends.
It's referenced above, but work/life balance and family responsibilities are a key reason that I'm not interested. Our RC travels frequently and that would not work for me on a long-term basis.
SES needs outweigh own personal needs
The inability for SES to work credit hours; affects work/life balance
local family responsibilities
<i><b>Mobility</b></i>
All positions are in very large metropolitan areas. no interest in living in a large metro area
Although lengthy travel is not an issue, it is important that I remain stationed in my current city
always have to be in a metropolitan area
Concrete, buses, taxis, lack of green grass, fresh air, mountains...
Location
moving to Baltimore for an extended period
SES positions are all in large metro areas with expensive housing
Unknown locations

Will there be SES vacancies in my region?
Rarely move SESers to other agencies
type of position avail/ what components
Being transferred to another State without employees agreement
assignments other than home area
Do not want to live in a metro area.
Don't want to live where SES positions available
Geographic location of SES positions
no control over location or placement
Ability to remain in current location
being required to move with 3 days notice for an SES position
changing assignments during developmental program and possibility of having to work in a different location (geographically)
Geographic mobility
I am interested in the SES CDP, however, as a single mom, I do not have the flexibility to complete assignments and/or relocate outside of my current work location.
I am not able to move for a job.
I do not want to have to move.
Inability to leave the area due to spouse's job
My spouse works as a manager in local government and is not mobile. I am unwilling to live separately for career advancement.
My wife has a career so I cannot agree to be mobile
need to move
not looking to relocate for a job
Potential mobility issues related to spouse's job
Probably have to move
Relocation
Relocation
Relocation
Relocation to Baltimore
required detail out of state
required extreme mobility

required to move to Baltimore
required travel
Requirement to be mobile
Requirement to be mobile at this time, since child is in the last two years of high school.
Requirement to work in Central Office
The fact that you can be placed anywhere in the country and have no choices
The requirement to do a rotation in another region.
There are few regional SES positions and only 2 or 3 planned in the future for any of our regional offices. I'm not interested in moving or going to Baltimore. I can influence activities at the local level in my current position.
To be mobile
TRAVEL
Travel
Travel and little information available about exactly what this entails, especially AFTER the CDP
lack of mobility outside state due to small children
Mobility
Mobility - I have 2 special needs children and a support system in place which makes me immobile. Without the mobility requirement, I am extremely interested.
mobility in selecting assignments
mobility is issue #1; I have a disabled spouse and I cannot stay overnight at training sites or move to other locations
Mobility/location uncertainty for execs who may not be as mobile due to various reasons
physical disability-need for new personal assistant in HQ, finding doctors in Baltimore area , accessible housing
month-long training in Boston
must be away from home for extremely long periods of time
must take field assignment
Virtual assignments would be critical.
Virtual participation
requirement for long term training assignments outside of commuting area
Requirements to complete long term assignments outside of normal commuting area
<i>Lack of Information</i>
Inadequate Guidance

Lack of guidance to participate
lack of information
lack of information about program or posting
Lack of information about the process/position
Lack of information on the ability to apply to be stationed in a particular area
Lack of information.
Lack of knowledge of program requirements.
lack of knowledge of the program
do not understand the program/process
Don't understand it.
Field persons in smaller cities have less information and opportunities to gain knowledge from experienced persons
FO management is not notified timely of the SESCDP to apply and secure the required recommendation/documentation.
I don't know about the program or its benefits to me or the Agency
I don't know much about it or why it would benefit me.
I improved marketing having information sessions to clear up some concerns and expectations of the program
Insufficient information from management
It would be more appealing if there was some idea of what positions might be available upon completion of the program.
lack of explanation about process
Lack of leadership motivating employees to apply
Lack of leadership promoting SES CDP
Lack of managers advocating SES CDP
Lack of performance discussion from management
no interaction w/ SES ees
No one has ever explained the requirements
No opportunity to discuss with current SES
Not aware generally
not aware if applicable to me
Not enough information about the program to make a decision
Not knowing about selection criteria

Not really understanding the application process.
requirements have never been communicated to me
SES discussion should be included in the PACS discussion for all GS 14 - 15
To my knowledge no one has specifically gone in to details concerning the SEP CDP process and responsibilities
Very little knowledge of the program or process
Missed the announcement
Notice of openings
I was not aware of this program until now
Also I think the current SES personnel could meet with their staff to explain the parts of the job and paint a good picture of what the SES job does for the Agency
Did not even know about it
Did not know about it
Did not know about it, so none of these apply.
Was not aware of position
Was not aware of posting
I was unaware of the solicitation for applicants
Lack of information from Management
<i>Process</i>
Interview process is flawed and unnecessary
Interview Process is intimidating
Application process overly burdensome
Conversations regarding the application process with leadership
current work and priorities hinders ability to devote enough/appropriate time to application
Day long assessment center
Have applied for CDP before twice. I am not interested in repeating rigorous Assessment Center exercise again.
Candidates are not supported during process.
unrealistic performance expectations as it relates to ratings
interview process
Believe I could do an SES job without going through the program



Documented Executive level experience in the private sector should be enough to certify someone for SES
The process is not merit-based. Too much emphasis on "political acumen" and little emphasis on other executive competencies.
Extensive selection process
DC scoring process
Easier to change agencies and get a 15 than go through SES Program
Lack of understanding of financial management by Leadership
Lack of vision by SES personnel during prior SES interview process (which I interpreted to be the way that they want SES members to think)
Not being part of a development program
Obstruction from Office of Executive Services
Private sector experience is discounted
Process
process is all about who you know and therefore to political
process not based on merit
process within component is rigged
Public Financial Disclosure reporting requirements
ridiculous requirements
Selection Process
Selection Process
Selection process/who makes the decision to select
Selections
The CDP program places too little emphasis on peer review for candidate qualification. The current process over emphasizes requirements of time in service, superior evaluation, specialty examinations for candidate qualification.
too much weight placed on a subjective assessment center as opposed to the applicant's real life demonstrated leadership
unknown selection process
Other Federal Agencies Appoint Individuals to SES
unknown mentorship
Way too much paper work to complete for very limited number of positions- let me get selected first then require that.
CDP not engaging/innovating
CDP not flexible
CDP was not shared as an option

Hard to find time to do good job on application
too long of a program
Provide support and guidance to executives for agency new initiatives in mobility, resiliency, unified communication and automation.
<i>Not Worth It</i>
Ability to work from an alternative duty station
ADS
Not able to work comp/credit
Telework availability
Don't like the fact that you lose the right to earn credit hours and are expected to work 24/7
no work from home opportunities that make it enticing.
Expectation of 24/7 work
Expectation that SES would add to my work hours but not much difference in pay.
long work hours
Fewer civil service protections.
Flexibility
not interested in having a 24/7 job, not worth the time taken away from personal life
As a GS-15, there is no additional compensation for going into the CDP while GS-14's get promoted to a GS-15 while in the program
Because of issue #1, the minimal pay increase is almost laughable.
Noting enticing about working myself to death.
Does not seem rewarding
I'm a grad of the SSA Advanced Leadership Program. Had sufficient exposure to the demands of SES to know I don't want it. Not enough \$\$ for the add'l responsibility/time.
insufficient incentive
Lack of Job Protection/Increased Vulnerability to Political Attack is a critical issue late in your career
more pain than gain
My current salary is commensurate with many SES positions, so my interest in about personal and professional growth. I am not currently persuaded entry into the SES CDP would satisfy that interest.
Not worth the headaches
Program Expects much and returns little compared to a GS-15
Rewards not worth effort

SES I know express concern that they were more influential before SES
Several current SES tell me that pay increase is not much but work increase is
So many meetings!
The increased responsibility and accountability does not seem to match the benefit.
The increased scrutiny of your assignments and decisions seems overly burdensome.
There are a lack of protections for discrimination complaints for the accused. As a manager, I am deeply concerned that an allegation can be made against me that would have a profound negative impact on me and my family. This concern deepens as an SESer
There is too much responsibility for average level of reward
Expectations
SES responsibilities are not always accompanied by the authority necessary to carry out those responsibilities.
I would never adhere to the unwritten dress code!
Pay
Pay/benefits not adequate
In my geographical area, the pay differential between GS 14 and SES is not proportionate to the added responsibilities.
Not enough pay for the responsibility
Don't want to take on the stress of that position.
Stress
stress level of current SES
Fear of the "Unknown"
lack of consistent, nationwide employment and personal protections for gay and lesbian persons, coupled with the requirement to be fungible, make the SES a frightening prospect
<i>Political Environment</i>
Current Political climate
Being SES means you have to become overly "political" (in terms of internal, organizational politics) and, to some extent, have to trade away at least some integrity in the process of satisfying the higher-ups. I'm just not willing to do that.
Changes in administration and influence on executive level politics
Do not like agency politics
Heavy involvement in political motivations instead of doing the right thing
High level of office politics at SES level
Highly Political Environment

Negative political environment at SES level
Not interested in playing politics at such a high level
Not interested in politics
Political
Political
Political association of SES positions
Political Factors
political posturing of SES CDP candidates
Political Process
Political selection process
politicization of federal employees, and in particular SES
Politics
Politics
Politics
politics involved
politics involved in developing and archiving strategic goals
Politics of the ERB selection process
Politics: The DCs already know who they are going to select, so why bother anymore.
SES position has become too politically controlled.
SSA politicization
The politics-driven decision making
Too many political issues I personally like to stay out of between components
Too much politics negatively impacts progress
Too Political
Too political
too political
Too political; too much seems to do with who likes you or if you are in the in group
dissatisfaction with the political nature of the agency
I have seen too many SESers fall out of favor and lose positions due to politics/whims of those in power

Inability to affect and lead true change within the agency
Inability to effectuate change, regardless of position
Lack of camaraderie at SES level
Lack of interest in dealing with the political realities at the highest levels of our organization.
Not pleased and often do not agree with current leadership and their practices and priorities from the top (i.e. COSS) down so don't want to be included in it, wouldn't fit in well
<i>Management Support</i>
current supervisor not supportive in any way
Do not believe my previous supervisor was fair or impartial. He would not have supported me and did not support me giving me the lowest rating I have ever received.
If management wanted me to apply they would have asked me to do so.
Influence - is anyone encouraging me as potential?
Lack of management support -- which, in turn, is often, the result of unconscious bias
Lack of support
Lack of upper management support
My previous supervisor did not complete my PACS until December 2015, the day before I started a two week vacation. He is supposed to be considering changing my PACS, since January 2015, but I have not received any information.
No sponsor.
Requirement that DCDAR recommend or concur.
SES CDP application requires an executive recommendation, but most FO management are too far removed from executives to request a recommendation.
uncertain of mgmt support
Uncertain of Support at Headquarters Level
unknown position of recommending officials
Senior leadership is not always honest with GS 15 managers. One executive encouraged me to apply and the other discouraged me to apply
The SES CDP is not encouraged or promoted from management.
general lack of mentorship in my office
Guidance
no support from component leaders
No support from local mgmt.

No support from Mgmt
Past Supervisor REFUSED to support me in development opportunities
Lack of understanding value of CPA to financial and operations management
Management de-values employees with experience, skills and actual substantive knowledge of social security laws, rules and regulations.
Support
bad prior relationships with management
Management Support
Management support
I was a Supervisor but I did not get my managers support while in the position so I stepped aside.
<i>Unlikely to be Selected</i>
Regional candidate already identified
Don't feel I have a managerial temperament or skills
don't schmooze well
not sure if i fit in as an SESer
SES folks I admire have calmer temperaments than I do.
unable to make decisions
I have successfully led several agency efforts resulting in my direct report executives receiving high SES scores- -I can't even get an interview when I score high on the BQ list
lack of experience in ECQs
Experience
I'm not sure that I would have a fair shot at being selected given that I am a GS-14. I understand it's not impossible to be selected, but it seems like a longshot.
Extremely unlikely to be selected
I am not treated as a valuable employee now.
I do not think that SSA agency leadership is looking for SES candidates like me.
I filed for the Advanced Leadership program in 2012 and got through to be interviewed and due to budget constraints, the program was cancelled. I applied again in 2014 (with two additional years of experience) and didn't make it through to be interviewed.
I have thought of applying to a CDP, but as a Technical 14, I feel I would not be selected due to lack of SSA management experience at the 14 level.
If I cannot get a 15 where they know and appreciate me, how am I going to advance elsewhere?
Inequitable treatment demonstrates that applying would be futile

lack of networking skills in the government I feel would hold me back
Lack of SES positions in my current geographical location
lack of SES positions in Region where live, especially in component
My AC told me she would support me if I applied in the ALP which came out at the same time. Ultimately the results were not positive.
My prior supervisor relationship with a key SESer would have resulted in me not being considered so I did not waste my time.
Not enough experience in my view outside of Systems; feel I need to be more well-rounded first
Recently had temp GS 15 position which was not extended (due to ratios??), very disheartening
unsure if prior experiences qualify me for CDP
<i>Pathing</i>
It appears difficult for those who are not in a supervisory position to be selected for SES, even if they have management experience outside of their SSA career. A path for those not in supervisory positions but qualified would help.
I lack a supervisor job at SSA; however, in previous jobs have led up to 16 employees with success
Lack of leadership dev opportunities to set the stage for SES
need more experiences to enhance application
no established venture for dialoguing with current SESer about the process
No Technical path
No technical track in SES
Career preparation. I believe that a track towards SES should be established. SES seems to be a big secret until the moment the application process is presented and then you get an overview. Mentorship, training, and supplemented education s/b provided
for an attorney, very little opportunities exist
GS 14's are not really considered unless they worked in the Field Offices for several years. It just appears that HQ GS 14's have a harder time getting into the program.
Lack of training
little supervisory experience at the time
need exec training classes
Not sure if expectations require supervisory responsibilities, more interested in Research and Development of Predictive Analytics efforts to combat fraud.
ODAR attorneys do not get the budget experience required. This shuts many good applicants out of the process.
Not given opportunities to excel at Executive Level
Wish to retain my highly technical expertise as well as become an SESer.
If someone is interested in the program, it would be nice to have some training available to develop yourself

towards the goal.
My current position is demanding and stressful and doesn't allow time for training, education, etc. It seems that this Agency just seems to expect you to "get it" from years of trial and error. There should be established tracks. I'm a technical resource not management, therefore, it seems SES doesn't apply to me. But, I would be interested in pursuing higher levels in my career if it is offered for technical resources.
<i>Timing</i>
Asked to help with continuity during middle and upper-management changes.
Closing out the "NSC Project"
Completing the current enterprise telephony projects on-time and under budget.
Current commitment to new data center project.
Very happy with current leadership training opportunities that I have been provided recently.
I was already involved in a leadership development program at the time the CDP was offered. I wanted to finish my current program before trying for the CDP.
I was on military duty for most of the application period and DCHR refused to extend it so that I could get all of the required documents, specifically the SES endorsements. I had an RC willing to do the endorsement, but there was not enough time.
i was personally extremely busy at the time of the opening and did not have the time to complete application.
no one else to take my current role to allow training and time commitment
Timing
Timing
Timing not right last time
Wasn't eligible (time in grade)
Will probably apply next time
Would love to do SES had I come into government earlier in my career rather than later. Unfortunately, I don't foresee having adequate career time left for SES development and subsequent placement. This I regret. A shorter-term opportunity would be great.
My experience did not meet the criteria at that time.
lack of time in current
Additional time needed at GS-14 level
Felt I needed to go through the ALP first
<i>Placement</i>
Position changes that appear as punishment
frequent changes in assignments



Changing Leadership
Constant changes of leadership in these positions
Constant movement of SES positions at SSA
Disenchanted with constant changes and movement of Executives.
Number of yrs that current CDP candidates are eligible for placement, but are not placed in permanent positions.
Worried about SES CDP placement and was it a fit for my skillset or capacity
I do not believe in your method of imparting functional and applicable management practices by moving people to other agencies. You create a false sense of security for management practices as a "well-rounded" manager.
I have known of folks that had to leave the agency to get a position after completing the program
Several individuals from former CDP classes remain in acting SES roles. They receive all the responsibilities and duties of an SES, but none of the benefits. They are remanded to GS-15 pay, parking, and privilege.
Some SES land in positions they are not interested in
agency philosophy of executive fungibility and lack of regard for value of knowledge and technical expertise
I do not agree with moving SE to components where the SE lacks expertise
No idea of where you will end up after program
SES can be pulled or put elsewhere with little regard for the time invested in current assignment
<i>New Job</i>
New manager
new to present job
Came into federal service too late in my career
I was new to my component
ONLY BEEN HERE FOR 3 MOS
Recent Promotion...it would be wrong to leave so soon
Recently acquired new responsibilities and would like to learn them
Recently promoted to current position (less than 3 years)
Was brand new to OEST and did not think new managers could, in good faith, recommend me without yet knowing me very well
I have been in my current position since October 2014.
I was promoted into current position in the last 6 months
I was recently promoted to a new position during the last solicitation for the CDP and did not feel the time was right.
I would like to wait another year due to new position just acquired

<i>Mentorship</i>
lack of mentor
Lack of Mentor
Lack of Mentor for current position
Lack of mentor program to learn about process, prepare, develop skills etc.
lack of mentorship or support
lack of strong mentors
Mentor
Mentor choices
Mentor program is a poor idea, most not competent
Mentoring
Enhanced Mentorship
Need mentoring in our component
<i>Not Interested</i>
no interest
no interest at all
Not interested
Not interested
Not interested
Not interested in applying.
not interested in managing an org other than systems
No longer feeling the ability to be a cheerleader for the agency or suggest people work here
Not tolerance for the verbal diarrhea
no desire to be a leader in the agency as it is now
I do not want to go back to managing people.
I want to stay in OGC.

### *Time Involved*

I do not want a job that requires that much of my time.

I was extremely busy with the affairs of my office at the time of the solicitation.

insufficient time to apply

Not enough time to put an application together

Time

Time away from family for Harvard training and regional rotation.

time commitment

Uncertainty about the length of time I would be located away from my family while I was going through the program.

current workload makes it hard to find time to apply

demands of my current position are overwhelming - time factor

Current workload

### *Like My Job*

Decision not to apply has mostly been related to staying with chosen career path

Happy with current role

I have project commitments I feel obligated to see through

I like really knowing the work that I do. So many at the highest levels seem clueless.

Involved in a project that i feel responsible for - do not want to abandon it until it is complete

prefer a Technical role, not Management

Wanted to invest more time in current organization, which is very new.

current goals and initiatives I am involved in; would not have time to do work on them if I get on the SES CDP

I only want to work in tech positions.

### *Education*

degree qualifications

Is a college degree required

Lack of a Degree/education

lack of formal degree
My Highest Education Level
No Advanced Degree
Only have bachelor's degree, many have master's or JDs
I do not have a college degree
<i>Competition</i>
limited number of SES positions within the agency where I currently reside
Management competition
Many of the individuals selected are very ambitious. It is more important to me to perform well in my current position than trying to build a resume for my next assignment.
Only very few get selected for the program.
Ratio of applicants to selections
small pool of applicants selected
Too few allocations for my component.
willingness of Management to reach out to a select few and not all
<i>Health Issues</i>
lack of success re others I know w disabilities similar to mine who participated in LDPs over the years
health concerns
Health Issues
Health issues
I have serious health problems.
my disability
now having health issues
<i>Not Eligible</i>
New in GS14 position

Recent promotion to GS14. Wanted to have one year of experience at this level.
not eligible at the time
not eligible at time it was open
Not eligible the last time
Not ready yet, only 6 months in GS-14 position.
Not sure I was eligible for last advertised CDP.
<i>Other</i>
1811's don't appear to get selected very often
Did know about the program
Did not acquire and submit an executive reference statement.
I am passionate about our mission at SSA. Not interested in working for another agency.
Demographics
I did not apply for SES, but did apply for ALP. If SES application was similar to ALP, there is no way to describe your abilities with the limited space given on the application.
morale of SSA employees
My greatest talents are research and writing.
Opportunities
spiritual beliefs
Too tired
insufficient staff resources to meet expectations
I am acting in an SES position, and hope to compete for it.

Please tell us if there is anything else you would like us to know about why you don't apply for the CDP or SES positions.

(Frequency table of categorized verbatim responses)

(Respondents were limited to **brief** text responses)

Response	Frequency	Count
Work/Life Balance	<b>12.4%</b>	51
Mobility	<b>11.7%</b>	48
Lack of Information	<b>11.2%</b>	46
Poor Impression	<b>10.0%</b>	41
CDP Process	<b>9.5%</b>	39
Selection Bias	<b>9.2%</b>	38
Not Worth It	<b>7.3%</b>	30
Age/Near Retirement	<b>5.8%</b>	24
Timing	<b>5.6%</b>	23
Management Support	<b>5.3%</b>	22
Not Interested	<b>4.4%</b>	18
Other	<b>3.4%</b>	14
Unlikely to be selected	<b>2.4%</b>	10
Pathing	<b>1.2%</b>	5
Education	<b>0.7%</b>	3
Total	<b>100.0%</b>	412

Please tell us if there is anything else you would like us to know about why you don't apply for the CDP or SES positions.

**Response**

*Work/Life Balance*

At one time the SES factored into my career goals, however I NOW value and enjoy my home life and will not sacrifice soccer practices, soccer games, lacrosse games and other family functions for the benefit of ANY employer.

At this point I am not ready as I have small children. but from what I do see, I would be a concerned a bit as I hear that SES applicants are 'handpicked' (preselection)

At this point in my life I have 4 school age children in high school or college. The thought of having to be move at any time is not very unsettling to my spouse. I am interested in virtual assignments.

Being away from the family for an extended period is not good way of balancing your work life with your family life.

Don't see the SES as a family-friendly career option, since balance is not generally what is expected in the SES positions. The need to be on the BlackBerry 24/7 is a difficult choice for those with young children or other family responsibilities. (Note: Work life balance is discussed and even suggested, but not modeled.) Most who have excelled in the SES appear to be single people with no family responsibilities. It may just be that the mobility requirement self selects these individuals, but the perception is there none-the-less.

For married individuals with families I believe the SES program is nearly impossible.

Four very ill parents for the past 5 years have taken up much of my time and I was unable to apply. I also feel that my lack of supervisory skills at the government will take me out of the pool of candidates even though I teach college and at my last non-government job I had up to 16 employees. Finally, I feel that due to my current job, I don't get "out and about" enough and do not network as I have in other government-held jobs.

Getting my children out of high school who are 14 & 16.

Going into the SES program would require a move to a much larger location and my standard of living would go down compared to current standard, even with the promotion and the pay increase. This is a factor but I have not made a decision to not seek the SES CDP, but it must be considered since I have 3 school age children in the home.

I am interested in the program. The burden on my family and perceived need for more professional development are the main reasons I did not apply.

I am not willing to be away from my family for long periods for my job. I also don't have the time to even apply for something like this because of my current Branch Chief responsibilities. I have to weigh my life against the job.

I am very interested in applying, but I have an autistic son who lives with his mother. His mental well-being requires that I remain nearby to him. I cannot commit to SES that I will relocate at the whim of whomever makes that decision.

I am very much interested in the CDP and/or applying for an SES position; however, the current demands of my very young family will not allow me to put forth the commitment level I feel that an SES position requires.

Unfortunately, my flexibility is driven

by the needs of my children, and not my career at this point. Perhaps once my children are older, then I will again have flexibility and the time that I need to invest to hold a position at the SES level. Thank you.

I believe I would be an asset to the agency as an SESer. I am interested in serving and have been encouraged by SESers to apply. However, I am very concerned about the possibility of having to relocate and work/life balance. I just don't have the option of leaving my current residence. Thank you.

I consider my lack of knowledge about the CDP and SES to be my responsibility. I believe that if I sought out information it would be available. It's my best guess that the responsibilities of the positions are not manageable due to work-life-balance concerns at this time. My current position is a perfect fit now.

I feel that individuals in an SES position have a hard time maintaining a work life balance.

I had two issues with the first that I am a single parent and can't leave my child for a development assignment. The second, my understanding from OPM is that private sector experience at the level of Vice President can be considered for SES certification. However, at Social Security I am told the only way to be considered is by application and acceptance into the SES program. However, I have personal knowledge of two external hires that

were promoted into the SES program and they did not have Executive experience in the private sector. It would be beneficial to allow candidates to pre-certify their private sector experience.
I have 3 young children, which does not afford me the time commitment it appears to be a current SESer. Executives seem too involved in the details of SITAR projects and struggle to provide clear guidance, which can lead to months of a decision making process because we have to wait to get on somebody's calendar. Many agency priorities shift quickly and agency seems more reactionary instead of being proactive. Much of the work we do in Systems currently seems like work Operations could handle. Systems should focus more on Software Development, but currently we handle a fair amount of Business Process Development.
I have been and continue to be encouraged to seek promotion to the SES however, the expectations and commitments needed to be in the SES conflict with a balanced family life. I plan to explore the SES much later in my career.
I have young children. This is my main concern.
I intend to apply in the future; I did not apply this time because my son was too young and our family needed flexibility.
I made most of my statements in the survey. I do however appreciate this survey. But I'll add that I already have a demanding position--I like my work--but its demanding at all times. Being able to handle the demands sufficiently requires constant connection (via blackberry, email, phone, etc.) which leaves very little time for personal health, family interaction, or even outside social needs. I have young daughters. I believe that children need their fathers in their lives and especially daughters need fathers. I already and spread thin and don't spend enough time with them. My mom has stage 4 ovarian cancer and it has spread to her stomach. I am caring for her daily and ensuring she has as much quality of life as I can give her. My long hours at work has already kept me apart from my wife for lengths of time and the weekends I play catchup on administrative things (bills, repairs, etc.). I many times question my world view on things and the manner in which the Agency responds to some things. It makes you cautious wondering if you have made the right decision, when you have really put in work to make the right decision only to find out that it wasn't the right decision by someone else's standards. Government is tricky. The political aspects are hugely challenging. My background is Accounting, I am trained to know that there is always a clear answer in numbers, but in political dialogue or new interviews, nothing seems direct or absolutely true. I would want to hone those skills before or during consideration of an SES position. It just seems that the "it factor" is an invisible thing floating around and those who get hit by it know it, feel confident and go for it. Others just have aspirations for the position. My character is to be an honest, good leader but one that can still be human, take care of his family, and be away from work when I am away from work. One of the survey questions asked if I were ever influenced by an SESer to not consider the SES. The answer is NO, but certain actions or what appear to be responsibilities appear to make the position seem overwhelmingly stressful. It also appears to be one that is for individuals who like to talk, debate, negotiate, state their position. I like to simply discuss and find a workable or best solution. It never seems that simple. What is provided in terms of organization, skills, time management, and people management does the Agency provide to ensure that these individuals are equipped with the right tools? I don't have time now for a simple course in something I'm interested because it falls on a date that an important meeting is scheduled on or because of something else work-related that is a priority. I wonder if I need to take any specialized courses to prepare myself for the SES role? Additionally, I know that there is a whole different perspective in the field offices; i.e., the front line. I seem to think that every administrative person should work a tour in the field--it provides for a more well-rounded employee. I have not had that opportunity. While we offer such opportunities today, I don't feel they are designed for GS-14, GS-15 grade levels. It's been said that you are too high a grade to justify pursuing duties at a lower level, even though it's in an entirely new and different area of the agency. You are in reality "brand new" in that area, regardless of your current grade level. Even certain training is refused to higher grade levels. Overall, I have a great deal of respect for those who are in and have pursued the position. I don't like failing and I'd like to have a good sense that I am confident in the skills and tools I have to at least consider it. Sorry for the length of my response, I wanted to respond honestly because I have contemplated pursuing the SES but I feel I want to make sure that I am equipped with the most and best of qualifications I can before going in.
I think SES is a great program but, since 1999 (and I did not become a mgr until 2001), I have had extraordinary demands for parent care (my own parents and now my mother-in-law) which makes taking on the responsibility of an SES impractical.
I think that although the agency is generally family friendly, applicants with young children or other family obligations may be disinclined to apply for the CDP positions due to mobility and family care issues. This potentially excludes a large portion of viable candidates until/unless there is more widespread support for teleworking and virtual detail opportunity. At this time, employees considering applying are essentially forced to choose either family or career for not just the duration of the CDP, but also potential future SES assignments.



I would love to contribute to the Agency's mission at the SES level, but I have young children; I cannot be away from them during the CDP. I am very concerned about the family-friendliness of the SES. From afar, it seems the real-life expectations are designed by and for empty-nesters; that you devote your life--literally--to the SES, and that family and personal life come last.
Issue of work-family balance - some executives very for the balance, other execs say they are but really are NOT. SSA needs to examine this more closely and make it clear whether or not they support family balance with executive career - or if they will just continue to say they are and still expect work to come first/family second.
Mainly just want to be home every night at a decent hour to be with children as they grow and mature; have a desire to be a good father figure unimpeded by SES workload demands.
Mainly work/life balance and requirement to be mobile. Have family responsibilities and a life other than work.
Mainly, the family support. I currently have a 1 year old and a 5 year old that require more support from me at this stage of their life. Once they are a few years older, I will have more flexibility with my work life to be able to full-fill the requirements and availability to apply and be considered for the program.
My answers on the previous page sum up my main reasons for not applying. My reasons are two-fold. Family responsibilities (have a special needs child in middle school, the next few years are very important) and I don't feel the pay of SES is worth the added responsibilities and stress that come with it. I would like to advance a step further in my career, but not eager to make it happen until my family obligations are more resolved.
My concern is my family. I do not believe I can fully commit to this type of position and still be there for my family. At this time in my life the money and status are not that important and may never be.
My life would not be my own. I would have to move on a moment's notice away from family and friends. SES members seem to work 24 hours per day 7 days a week, there is no perceived work/life balance. I do not have a graduate degree and was once told that it is necessary to have one, or be pursuing one to be SES acceptable. I am in a region where there aren't many opportunities outside of the work I do in the field. It is my understanding that the ACOSS is only interested in people who have worked in more than one component, so it appears most acceptable candidates are located in the Baltimore/Washington area.
My personal situation makes it difficult to be away from family for an extended period of time.
Seems like the program is not meant for people with a young family. I have no desire to be away from my kids during the CDP
Some SESs have mentioned the long days, long hours and no weekends with the family due to professional obligations. Sacrificing family for professional development does not sound as something I am willing to do right now. Thank you for the opportunity to provide feedback.
The biggest challenge by far would be trying to figure out daycare/school arrangements if I were gone for several months on assignment outside of my city; spouse works full time and job is not flexible to allow for both pick up and drop off. Also unsure about missing out on my child's life for several months. If I lived in Baltimore this would not be a barrier. Living in a region now with no extended family nearby to help out with child arrangements makes it difficult.
The impression that I have of executive level positions is that there is not sufficient life/work balance. In addition, SES positions appear to be far more political in nature than I desire at this point in my career. Instead of stating facts, we often seem to be in constant spin-mode.
The main reason I did not apply for SES this year was because my only child is in the last two years of high school. Plan to apply next year or the year after.
The most important factor affecting my decision to apply or not apply is the ability to maintain a work/life balance. From what I have seen, the SES cadre is unable to effectively manage work and family OR the cadre does not have a relatively young family to balance.
The primary reason is personal. I have two young children at home. As circumstances change, so will my ability to apply.
The reason why I did not apply for the CDP or SES position is more personal than professional. There is some expectations that I want to be able to fulfill at that point of my career. At this moment, I have two small kids and I want to be part of their life. I would like to apply for the SES in the future, but I am not willing to miss some stages of their life.
The responsibility level appears scary and more demanding. I already have a demanding job and the SES would be worse. I'm not sure I want that added stress coupled with home/life responsibilities.
The SES CDP plan runs contrary to our agencies stated belief of work-life balance. I have a young family and am not interested in being away for six months for the potential of getting a SES position. However, every executive I spoke to went out of their way to emphasize the mobility requirement of the program. I know I would be a great

executive and have a lot to offer the American public. However, I don't see my opportunity ever coming in my remaining 20 years with the agency. It is more important to me be a good parent and spouse than it is to join the CDP. It is even more discouraging that there are never SES positions opened competitively in DCO. It was even more demoralizing that the last such vacancy announcement (ARC MOS in Atlanta) was cancelled with no explanation. Applying for a SES job is a lot of work and this was really discouraging.

The SES program merely caters to those that are single and have no children. Also the amount of working hours that an SES position demands is not realistic for working parents. Also it seems to favor those in HQ and Regional components. The length of time required to be in the SES is not reasonable as you are required to be away from home for the duration of the program. I have been told on several occasions from my Area Director and other colleagues that I should apply and I currently have a 5.0 PACS rating but there is no flexibility whatsoever for working moms with young children to be involved in a development program such as this. If some of the program could be done in a home component or online courses, etc. I would highly consider applying for the program and positions.

The SES program, in general, needs to evolve with current everyday reality. Many "upcoming" and future SESers are in young families with dual income parents, in some cases with one parent working in the federal government and the other in private sector. This generation may be interested in the program, but unable to relocate for the program due to young family commitments. Thanks for seeking input!

The Work/Life balance is a real concern. I am dedicated to my job and set professional expectations for myself high. However, I am just as dedicated to my children. The balance is a concern.

There does not appear to be support or encouragement for those who do not fit a "scripted" mold within SSA Operations. Observations are, that those who have had potential to have a true impact, find themselves moved on to someplace else. Also, there have been multiple opportunities in the region that I sit and because I was not in the program, I could not be considered. I was very mobile for most of my career and now I am more concerned about my quality of life. I prefer where I am because it keeps me close to aged parent(s).

There is a culture throughout the agency's SES executives that discourages work/life balance. SES executives in other components regularly send emails in the middle of the night and over the weekends. Within OLCA, it is apparent that executives regularly work long hours during the week and over the weekends. I am happy to devote myself to work during normal working hours; however, I will not sacrifice my family for my work. Further, I do not wish to put myself and my family in the position of having to physically relocate at a moment's notice.

There was a DCO call with managers that explained the role of the SES CDP that I felt was very helpful to me. I am interested in the future but am not ready for that challenge at this time in my life with my family (kids in high school).

This concern is captured indirectly in the survey, but I wanted to reiterate it. It is related to work-life balance. I am not afraid of hard work while I am at work, and I firmly believe in the importance of what we do every day. But the existing culture is one in which executives must appear to be on duty at all times, in which seemingly all issues are critical and require immediate attention. For instance, it is common for executives to regularly send email very late at night and very early in the morning on weekends. This behavior too common to brush off as being simply idiosyncratic; it appears to be an expectation and part of the culture.

While I covet the opportunity to obtain "exposure" to other areas of the agency, due to family obligations (children entering college, ageing parents), I am unable to relocate to fulfill a development assignment. My preference is to remain at the Headquarters complex.

## Mobility

Lack of positions in desirable geographic locations.

As a management member of SSA, i fully understand the need to take a position at Central Office as a part of my development program but as a mother and a daughter dealing child and elder care, i don't see that is doable. I hope this requirement will change for the future candidate like myself. I know we have many qualify candidates did not apply for the program for the same reason.

As a parent with small children coupled with strong roots in the area, it is extremely difficult to commit to the mobility requirements of these positions.
At this point in my career, I am not interested in being mobile.
At this point in my life I am not mobile to the degree required by the program. At some point in the future this will change. I also have been in my current position permanently less than 2 years and am still enjoying it and not ready to move on yet.
Centralization of SES positions in Baltimore is a concern.
Family concerns and being mobile.
I am a care giver for my Mom and need flexibility and need to stay close to my home location.
I am a single parent with a young child, and family I need to stay near in my hometown. I cannot currently consider a position that would require me to move, or to frequently relocate on a temporary basis.
I am concerned of relocation if selected. while I would not necessarily need to stay in my current state i would prefer to remain in the current region if possible. this preference may evolve in the coming years once my son graduates from college within three years.
I am not interested in applying for CDP or SES positions at this time because I am unwilling to relocate while raising a school age child. Work/Life balance is also important to me and it is unrealistic to expect this from an executive position. My financial needs are satisfied and my ego doesn't need the next promotion.
I am very, very eager to apply for this program but it is my understanding that these positions are located in HQ. Unless partial telework is available, I could not apply for this position.
I believe the agency needs to re-exam where SES positions have to be located. If work is portable (i.e. telework, transferring work within the agency) why can't human capital be portable. For example, with technology is it absolutely critical that an SES position only be located within a RO or CO? For that matter this should apply to any position at RO or CO, can that position not be done virtually at some other location.
I did not apply primarily because I know I could not fulfill the current requirements for travel and training during the program. I would love to participate in a CDP, and would do so if I could remain at my duty station (or commuting area) for the length of the program.
I do not wish to relocate my family, or be apart from my family for any extended period of time. That is why I have never applied for the SES program.
I have a good team currently and am committed to helping them succeed as I think our work has an impact on meeting agency goals. I also have elementary school children and am not able to move at this point. I need to know that I can stay in Chicago. (My team reports to HQ but is physically located mainly in Chicago.) Occasional travel is acceptable, but long term assignments away from Chicago would not be possible at this time.
I have almost 40 years of service with SSA; most of it in the Regional Office. During the early part of my career, regional leadership positions were primarily filled from within by experienced managers and leaders who "grew up" in the Region. However, the last dozen years or so, our SES positions have been filled almost entirely through the CDP or by recent CDP graduates from Headquarters. With aging parents and other family responsibilities, I have been unable to commit to being mobile, and therefore have not applied for the CDP. I think in some cases the agency is losing the opportunity to fill senior regional positions with the most qualified candidate because the assumption now seems to be that regional SES positions are to be filled by CDP graduates.
I have family obligations that require my physical presence in my current location. I am not able to be away for long periods of time. I do not like the idea of having to move from job to job at the Commissioner's request. I still have a lot to offer the agency right where I am. Maybe down the road as my family obligations change I would reconsider.
I have school age children and I have moved them multiple times. I plan on staying in my current position until my youngest child graduates from high school in 2020.
I intend to - either when my children move out of the house or when the mobility requirement is relaxed, whichever comes first.
I started to file a few years back, but was not interested then in moving out of this area, and also, as an attorney, this Agency offers very little in the way of promotional opportunities. One cannot be hired into the 905 series and ever get to be an RMO - our system does not permit the excepted service - even if from 40 years ago, to be considered for a career position.
I would apply for this position if I could stay in my current location. I am a mother of 3 very young children who need me at home. Otherwise, I would be highly interested in applying.

If we continue to discuss how portable work is, why do SES candidates have to travel? Particularly in metro areas.
It is an unfortunate reality that many highly qualified, talented GS-15s are not interested in applying for the SES CDP. For many, living in Baltimore is a significant drawback-both financially and with regard to family responsibilities and commitments. In an age of teleworking and in an agency where work is highly mobile, SSA is woefully behind the times in its structure; those who lead in Central Office must be centralized. Therefore, the agency misses a number of talented leaders from its top ranks. Additionally, isolating the agency's top leaders removes them the reality of what is needed by those we serve.
It is apparent that the sacrifice required of Field candidates, being away from family for 12-18 months is a significant barrier, much more so than for someone already in Baltimore. In addition, the final placement may well involve a full family decision to relocate, again, not a factor for many in Baltimore.
It was stated that the positions would probably be outside of the Philadelphia region
It's not something most FO management seriously think about. Even if they did it would involve a major move life change. The agency rarely offers any type of advance opportunities or details to FO management that does not involve a move.
Mobility is the biggest factor closely followed by potential reassignment.
Mobility limits my current availability for many HQ SES positions. The first 13 years of my career I was extremely mobile and rose through the ranks from a GS-7 to a GS-15 in under 9 years of service. However, due to family situations, I am not currently mobile. I have applied for the SES program twice. I made the BQL/passed the assessment center as a GS-14 applicant back in 2008. However, I did not make the BQL (failed assessment center) as a GS-15 applicant in 2012. In 2012, I had almost 4 years of GS-15 leadership experience (Director and Deputy AC level) where I was fully supported by my executive leadership. However, a subjective assessment center knocked me out of the process for consideration. While there have been outstanding selections to the CDP, I have witnessed where a number of selections to the SES CDP have been made where the selectees have never served in a supervisory/leadership role where they are truly "leading people," yet they "passed" a subjective assessment center process. While a number of these non-leaders go on to be outstanding SESers, In my opinion, demonstrated experience, coupled with superior recommendations from executive line leadership should hold considerably more weight than a subjective assessment center. An assessment center, in my opinion, only measures your ability to do well with fictitious scenarios and "what if" situations. This doesn't represent the real life challenges of leadership in my humble opinion.
Mobility of SES position every 5 years or so - as an 1811, does this mean another agency because there are no options within SSA? Also doesn't appear SSA/OPM select 1811s from this agency.
Mobility requirements are my only issue restricting me from applying for SES vacancies.
Moving around the country won't work for me or my family.
My primary barrier to applying is the requirement to be mobile for such a long stretch of time. I felt it is unfair to saddle my family with all of the household responsibilities for that length of time while I am gone.
My understanding is that when you receive an SES assignment/appointment that you need to be ready to move anywhere in the country. Declining appointments can be detrimental to further career advancement. At this time I need to consider the well-being of my family. I have young children and a spouse who is a professor at a university. Before putting in for the SES program, I need to be sure that I can meet SSA mobility requirements. I have worked with a handful of SES participants in the past, and regardless of their intent, the total effect on their personal and family lives were often profound.
Nothing besides the mobility factor- I am unable to relocate my family to Baltimore or any other far away location. This factor is the only reason I do not apply for an SES position.
Problem with mobility due to childcare responsibilities. Also, no one in my management has ever approached me and suggested I apply, despite stellar reviews and numerous awards year after year. Moreover, the one time I applied (8 years ago), someone in upper management nixed it. However, there was never any discussion about why or what I needed to do to get their support.
Relocating from some field locations to Baltimore as an SES would actually result in a loss of money by many employees because of the cost of living differences. I think that is a big reason for the low interest in SES positions by some of the best of the best employees. As such, SSA is missing out on some great SES candidates due to locating the majority of the positions in Baltimore. In today's electronic world, you don't need to sit in the overwhelmingly huge SSA complex in Baltimore to be an effective member of the SES. Hopefully, more

progressive and forward thinking management will fix that old mindset of "relocating to Baltimore" in the future.
Relocation and work/life are the most influential factors in not considering SES or CDP positions.
Requirement to be mobile, i.e., move to another region
Still have young children and don't want to be in a position to have to pick up and move if directed to do so.
That's it. I simply do not wish to live in any heavily populated city or metro area.
The mobility factor and perceived expectations of prior OCO/RO experience.
The mobility requirement seems anti-family. Work-family balance is extremely important to me and seems to be lost in the CDP and SES expectations. Removing this requirement would open a whole new set of resources that have never applied to the program before.
The primary reason for not applying is the requirement to accept relocation.
The requirement to be mobile, I assume means out of state. Mobile in my home area is not a problem.
The top reason I do not apply is that I am unwilling to move across the country multiple times, which seems required for these types of positions. It places those with a family at a definite disadvantage.
There doesn't seem to be any control over assignments and unfortunately at this point in my life I can't uproot myself to complete some of the rotations.
You must go work wherever they need you, which may be another region. This could happen frequently and you have to go.
<i>Lack of Information</i>
A bit more information on these positions would be greatly appreciated.
Although I don't know the actual responsibilities for many of the SES positions, for those positions that I know (such as Area Directors, Assistant Regional Commissioners, Center Directors in Regional Offices, etc.) I simply don't have the confidence in handling the SES responsibilities.
Certainly the lack of specific information about the positions is a big thing. Along with that, a concern of how much moving around is involved since I have a family that would prefer not to unreasonably uprooted. They support me, but I don't like to unfairly burden them.
Didn't know I could as a GS-14
For succession planning purposes, I believe it would benefit SSA to provide more information about the SES career path to GS-14s.
How are potential candidates notified about the CDP program, as I do not recall having seen a formal solicitation.
I am not very familiar with the program and or the process to follow. In my current position I have never been formally mentored or attended any type of training. I have learned the job mostly by doing/trials and errors.
I did not know as a GS-14 I could apply always told had to be a GS-15 to apply for the CDP or SES programs.
I don't really know enough about the program to know if it is of interest or if my upper management would support me. In my career I have always felt support with exception of the last year to year and half. This leaves me feeling somewhat uncertain about my future with SSA.
I feel that I am not prepared to apply for an SES position and I have never heard of the CDP. If I knew there was a development program to prepare me for SES, I would have looked further into it and applied.
I feel training on the process would be beneficial. In addition, a clear understanding on how executives get appointed without going through the program would be beneficial; and what SES positions one can apply for as a GS-15 would be helpful.



I have never had the positions explained to me. I do not know what the expectations are in the positions.
I think if I had pertinent information about the program highlighting it's goals, purpose and specialty, I would certainly be more enlightened.
I think the best way to learn about these programs is word of mouth from peers and superiors and that does not happen. The agency just sends out the email announcements so it is difficult to feel like one should really consider it. I also feel like I would like to be an Area Director before looking at an SES position.
I would benefit from conversations with those who have experienced the application and interview process.
I would have been extremely interested in this type of career development earlier in my career. However, I never heard anything about such programs then. At this point, career development would be better devoted to people with more time left to pay back the cost of the development.
I would like to know more about the program.
I'm very little aware of this program. I need some guidance. If a proper guidance is provided, I can certainly apply for the program. I am confident I can overcome any challenges to justify the requirements of CDP and duties of SES positions.
I'd like to know what this program is, what the agency is looking for when selecting candidates, and whether OGC employees have appropriate agency exposure to fit well in these positions.
Information is shared when the program opens. The Agency's succession planning should be viewed for improvement and leaders should actively promote this process.
Insufficient marketing of this program resulted in diminished program awareness.
It appears many SES positions are already assigned so I don't even know the consideration process, let alone apply.
It would be really helpful to have information about what it all entails and the requirements for travel and flexibility etc.
It would be wonderful if the agency would sponsor a workshop that outlines the steps necessary to apply for the program, program requirements, etc.
Lack of clear information about how SES position will interface with duties and performance requirements of HOCALJ position, lack of information about who can answer questions.
Managers need to be educated and mentored more on the process.
MORE (any) information about the program and notification of when it's posted.
More information provided to individuals in management
More information should be provided to potential candidates about the program.
More marketing of the program and information dissemination would help.
My component was moved from OQP to OEST in 2013, and the SES solicitation occurred within 6 months of the move. I did not feel my new management (which changed twice after the initial move) would have enough experience with me to recommend me. I also had concerns about what happens after the CDP. The CDP is now 12 months and requires relocation for at least some of that time. But what happens after that? There was no information about the long-term commitment involved (if the CDP were completed successfully). After the program, are you then required to report to any assignment you are given, anywhere in the country, of any duration? This was a huge factor for me. I did not want to commit to a program like SES without knowing if long-term, I could fulfill the requirements. .You need applicants that are fully prepared to go the distance. If we don't have a complete picture of the SES process, that is difficult to attain.
Never been given any information about the process or of how to pursue. Developmental opportunities are limited in OIG.
no real training or information regarding the programs
Not enough detailed information about the process and the assignments needed for the program.
Not enough information.

Not sure what I would be getting into.
Now is the time for aspiring leaders to think about the SES but we have not put encouraged a lot of interest in the SES corps other than announce a program. We should have SES interview available on VOD; SES forum; SES stories published
Opportunities are needed to prepare for entrance into SES that would give interested parties needed experiences for the program - i.e. taking an certificate program for executive leadership - virtual assignments etc.
Other than the announcement, Field Management persons(especially those in smaller cities) are not provided much information about development opportunities. In addition, we do not work directly with executives who have participated and are willing to share their experience. We must research and figure out available development programs. While we may have access to the information on the intranet, as direct contact persons, we are usually totally occupied with current job responsibilities during the work day. It's difficult to work on self-development when I am constantly working directly with the public, managing two offices, training employees and responding to emails. This year, I took the information home and researched; however, by then, I was not able to meet the time frame. Maybe next time?
Program should be promoted more early in a manager's career so they know more about career options.
There is no clear development track to prepare for a candidate to prepare/identify themselves as "ready" for the SES. It is "understood" that the Region will only support a single candidate and that person had already been identified.
There is no mentorship program that's readily apparent for someone interested in moving up.
There is not enough emphasis on advertising the program. In addition, there is not a strong recruiting plan to solicit Hispanic candidates. Thank you.
There is very little information out there concerning these positions. They are not generally discussed. It seems the thought is as a GS-14 you have gone as high as you should go.
There should be a virtual collaboration to promote the CDP or SES program to engage and motivate employees to apply for the program. Employees are very interested in both the CDP and SES CDP programs. I believe that better marketing of the CDP or SES program on a virtual platform such as a VOD could be beneficial for the agency to attract the interest of employees as a potential recruiting and marketing tool.
Was not aware of the program.
<i>Poor Impressions</i>
As stated when I look at the ranks among the SES Hispanic women and note that they have selected only one or two, that is very discouraging to me. Lack of leadership that could mentor other female Hispanics.
It seems very political in nature.
A number of years ago, I applied for the ALP at the urging of my immediate supervisor. I felt extremely positive about the process and my performance. In the end, the person selected from my component was obviously less qualified and less suited for the program than I was. This has colored my perception of development programs.
Be the change that you want to see in the world is a quote that I have lived by in working at SSA. Some of our current SESers may need to be changed in order to attract new talent and new ideas.
Changes in the SES/CDP resulting from recent reforms.
Commissioner realigns SES too often in Systems for no clear reason. Pay is poor given the commitment and responsibility. Retirement under FERS is worse, no pay benefit. Many SES are still acting after 2 or more years with no permanent assignment. See Commissioner's staff, minorities are favored. Even agency wide 68% women and 50% minority, we stil have a Diversity goal? xxxxx and xxxxx are still not permanent and are women. Selection process is political. Mentoring plays favorites, not competence. Many in the field say the new SES don't

know the business or technology. The agency needs leaders, not mentoring followers. People like me who have had multiple ideas implemented with over ten million in savings are not recognized or rewarded with promotions. The agency is very ungrateful to its champions. Management fears to promote them and take their job after xxxxx did this to xxxxx. The management dynamic still exists today. SES needs a major overhaul.
I am a team player and I have become tainted in my view over the years that SES managers are just concerned about their own "numbers" so they qualify for their bonuses. SES is less appealing to me because of the unabashed, self-serving interest in these individual outcomes. The lack of honest motivation to place the aggregate good of the agency first is concerning.
I don't have the personality for the politically correct games and politics played at that level and generated by the ACOSS
I don't think the program attracts the best people in the agency. It attracts those who want to 'network' and move around.
I don't want to sell my soul just to get ahead.
I have the sense that past Commissioners of SSA have valued loyalty more than competency, and this creates political tension among the members of the SES corps, and as a result among components. Because my salary is already comparable to SES pay, an endeavor into SES would be for the sole purpose of personal and professional growth that enables me to be a member of a team whose primary mission is to foster collaboration in providing world class service to the American people. Sadly, I am not confident this is what current SES at SSA is about.
I have worked alongside many Senior Execs over the past decade. Right now, the Senior Execs with whom I interact do not appear to enjoy their jobs.
I have worked in several components (not just the current one selected) and have seen the failures at the SES level (DCPS being an example). It is not encouraging to see the incompetence at the SES level or the fact that they are not held accountable.
I hope you take the results of this survey seriously, and I hope my peers use this as a vehicle to tell you the honesty of our reluctance to engage the SES program. Smart people in this agency deserving of SES don't apply because the program is flawed (see my issues earlier in this survey). Finally, I watched a friend in SES get bounced all over the country and live out of hotels for 2 years. I would like you to calculate those expenses footed by the public because your program is unsuccessful. Then apply those expenses to paying SSI or Retirement. Horrible frustrated and disappointed with SES.
I question the integrity of our current leaders.
I think it is a great development opportunity but what I see in this office is someone of a turn off. More about how much power rather than caring about agency and employees. Not all but some, need to find a better way to evaluate service delivery and dealing with staff. This was a turn off for me but I still believe it is a good program and will help the agency produce some good leaders.
I think it's an old boys and girls club who protect each other--even the incompetent ones. In general, SESers don't point fingers because they don't want fingers pointed at them. Why they put up with the likes of xxxxx, xxxxx and others is beyond me. It took a Commissioner with guts (xxxxx) to get rid of them, but there are more left who are not 'executives' in my mind.
I would have no concerns regarding the expectation to change positions as needed, when such changes are based on merit and business need. Of mild concern are position changes that occurs as a result of a change in political appointee, or changes that seem to be made as a means to punish.
I'm not certain I believe the rumor I listed on the previous page; however, I have some concerns about the political atmosphere and my ability to navigate through - I tend to be (politely) upfront and honest and expect the same from others.
In recent years, the integrity and behavior of individuals coming through the SES CDP process reflect a sense of entitlement, arrogance, and lack of respect towards federal employees, including managers who have worked their way up through the ranks and served this agency for years. I have seen execs abuse their power, take the position that they can do whatever they want to do, and manage by personality, not responsibility. It's a pool I prefer not to swim in. In my office, the SES CDPs have made statements that adversely affected morale, compromised performance management, and compromised the value of the office directors. In my prior office the SES undermined the integrity of the management team by pitting one director against another, removed a director from his position to promote a female friend, and allowed that person to create a hostile work environment that affected employees and management.
It appears at this level sr. staff must put aside common sense to fit in, or go along with the program. for example it is common knowledge that managers were told to mark down employees during PAC reviews to avoid giving



deserving staff outstanding ratings. Aside from being not nice and unfair, it's dumb to do this to high performing staff. easily confirmed--ask and look at drop in outstanding ratings over the last few years. also distrust in programs being put in place to raise moral are cosmetic, rather than dealing with real issues of trust. I don't have the stomach and would be unable to smile and comply with unfair practices.
It seems that there are people who just get put into an SES position but others have to go through the curriculum. There is no real explanation for this so it makes me feel that the process is unfair.
I've seen individuals who were selected for an SES Development Program, completed it (uncertain if they were certified) and then they retire, begs the question is the agency getting their return on investment? I think not. Conversely, young, inexperienced preselects get into the SES program who have no experience or knowledge about supervising/managing people. In addition, I have had a very negative experience (probably should have resulted in a grievance/complaint) with several current SES members and question how these individuals were ever selected for leadership positions, their ethics and integrity are definitely in question.
Leadership skills are lacking in the new SESers in our Region. It is not motivating to do things because they will yield a higher performance rating for an SESer. Maybe more classes on what motivates a TEAM and what should motivate a leader of value would be helpful within the program.
Most executives do not display good work/life balance, making the SES unattractive to individuals with family responsibilities. The pervasive lack of balance among the current SES cadre results in cultural pressure for potential entrants and situations in which individuals who do not conform to the cultural norm miss accelerated deadlines and critical decision points that impact their organizations. In effect, unless the cadre collectively slows down and exercises balance, individuals who do exercise balance risk becoming outliers and slowing overall organizational performance. The lack of balance exhibited by the SES cadre also exerts pressure on senior managers and technical employees to prioritize work activities and disrupt their own work/life balance. Cultural attitudes and norms create more of a barrier and negative perception of the SES than any of the technical requirements.
Most intelligent people have weighed the cost benefit analysis of SES and decided it confers no real benefit for them, which is why all agencies are having a hard time recruiting for SES. In fact, many talented people have no desire to advance above a GS-14 level for the same reasons. The unfortunate outcome of this is the people applying and getting the positions do so for the purported "prestige" afforded to the position as opposed to wanting the position itself. This has resulted in lackluster management. The mobility agreement is reason alone not to sign up for SES, as it allows retaliation against an individual without recourse for standing up for their beliefs in terms of what is best for the agency and the public we serve.
My limited sense of the SES process is that it selects leaders with a conservative management bias more concerned with personally not failing than in risking innovative approaches that might be controversial, but could change the paradigm.
Not overly impressed with some of the current individuals who are SES.
Public financial disclosure requirements, SES culture in SSA
SES comes across like a middle school clique
The most distressing part of the SES culture that I have observed is how much it is geared to self-promotion. It has become very obvious to me, and it has helped me understand when we are required to spend time and effort doing action items that are, essentially, taking us away from the important work of the agency. Subordinate staff dare not express that these workgroups or projects are detrimental, because the SESers I have worked with do not receive constructive feedback from their staff. As a manager, I routinely feel "used" as an enhancement for the SES performance review. In the meantime, I will continue to do my best in service to the public and make every effort to help my staff do their best in fulfilling our duty to those we serve.
the process does not identify leaders, it identifies those with ambitions but no courage
The public service gets lost in the politics. I do desire to serve the public - genuinely. My observation indicates that the SES positions are about serving other appointees and other individuals' political motivations. Service to the public is lost.
The SES system is a relic of bygone age. It is inefficient and rule-bound. The federal government needs to scrap it and start over.
There are a number of reasons that I am not particularly interested in the CDP or the SES. While I think there is an absolute need for strong leaders with a commitment to public service and the goals of the agency, I don't necessarily see that the CDP grows those skills. So much of it is project and task oriented so that folks can check a success off a list, but my observation is that the CDP does not foster the team building and communication necessary to truly

solve the problems of the agency. Generally, I think team building and communication are skills that folks either inherently have or they don't have - it is hard to grow these kinds of skills and made much more difficult in a program that appears to measure more individual success rather than team success. In addition, I work for DCDAR and the only role within the agency that I am interested in is that of adjudication. I would consider applying directly for an SES position (not through the CDP program), but only if I were sure that doing so would improve public service - I have no interest in career advancement solely for the purpose of advancing myself.
There are too many executives already.
There is an incongruity between the promise of resources and what is committed given the expected outcomes, particularly with new and sometimes poorly focused initiatives. This is challenging enough when you are responsible for a third or a quarter of the office workload. When you are responsible for the totality of the office workload, I'm concerned about the erosive impact that would have on an individual over the long-term.
Too many political appointees and too much turnover in DC level and above leadership at SSA. We risk turning into CMS which will be a shame given our past accomplishments and proud IT culture.
Too political; success measurements are too focused on simplistic goals rather than process and the system at work.
Viewing the recent COSS broadcast 2/06/15 (Quarterly SES VOD) helped convince me I would prefer not being part of SES.
A lot of the movement just pushes the agency backward. I cannot tell you how many SESers I have educated on various topics only to have them replaced or move on, only to be left with educating someone else. In my opinion, this lack of consistency proves to be counterproductive to the agency.
<i>CDP Process</i>
1) One of my concerns is that the process for how candidates are selected for the interview section is not transparent. While a summary of scores in the written and assessment sections of the process is provided to candidates, there is no explanation as to how those scores result in candidates being selected for an interview or not. This part of the process can be improved by providing candidates their numeric score and the cut-off score for interviews. This would not only improve the transparency of the process, but address concerns that the selection process has favoritism and that candidates are selected for reasons other than their application scores. 2) I am also concerned that several SES CDP slots are filled by external candidates, which results in fewer slots available for SSA employees. It is extremely rare for the agency to hire managers externally at the GS-12-15 levels, and a major reason is because knowledge of SSA's business is vitally important for employees to do those management jobs well. Why is this SSA knowledge not as valuable at the SES CDP level when external candidates can be placed in SES positions?
A fundamental flaw in the selection process is that my reviews influence it. I am reviewed by someone who doesn't understand enough detail about what I do to thoroughly review me, but my 3's and 5's influence my possible selection to SES. If I'm always reviewed by the same individual (with no 360 review where the supervisor isn't reviewed by those they supervise), how fair can the selection process be?
Another reason I didn't apply is that there is no immediate feedback. A candidate seems to be kept in the dark for a majority of the time. In addition, my family is young and cannot leave the geographic area because of the logistics. If I was to be relocated, I would expect it to be within driving distance to my home. Or, at least, the ability to make it home a few days of the week and especially the weekends.
Applied for ALP several times and got burned out realizing the selection process is somewhat corrupt.
Appointments seem somewhat arbitrary. It seems that knowing how to fill out the application is far more important than your qualifications.
Based on what I have heard and read about the SES selection program, it rewards the candidates who are most

willing to endure a very elaborate and time-consuming process. This is not good for the candidates or the agency. SES candidates should be selected based on demonstrated performance in their current and previous positions.
Doesn't appear to consider experience without going through the entire process. No "bye" round for people with a lot of experience.
Few GS-14s are selected. Promotion to a 15 isn't readily available. Most recent CDPers haven't been permanently appointed. Insufficient # of SES positions in an agency as large as SSA.
First, from my experience with my SES leaders, the CDP program has worked for SSA. However, it has increasingly become a full-throttle project-driven culture of I need a project that I can complete successfully in my short time here. It's more project management than leadership. This doesn't engage and motivate all managers and leaders to apply for the CDP. Secondly, the CDP program needs to loosen its rigid model and adapt the ways of the private sector to accomplish the same thing, like family-friendly schedules, self-paced programs, etc.
From my experience, my promotions from TSR to Level One Manager were all based on my ability to do my job well. I never had to participate in an interviewing panel to get to the next level, except when I was first hire. Now, every position I apply for requires me to interview, usually in front of a panel. The lack of experience in this area has stunted my growth. I would like to find a SES willing to be an informal mentor to me. Someone who can give me honest feedback and assist me with improving my interviewing skills. I have a wealth of experience and I am capable of learning quickly.
From what I see, we spend a lot of money on training individuals who are never placed in SES positions. Is this because candidates refuse to relocate or accept positions? Having read some online material about posted by participants, many indicate they will not relocate to as required by the program primarily for personal reasons. How do you enforce the requirement? This is a waste of resources and training and an abuse of the program. I am very interested in the program, however it seems that selections are based on who you know. Connections. From what I understand, the interview portion is very intense. Some agencies provide detailed training on applying, this is a great idea.
I am interested in SES. However, I have heard it is a very time intensive and cumbersome application process. It is rigorous as well, which has somewhat dissuaded me from applying.
I am very interested in applying, but again, due to the cumbersome application process, small pool of applicants selected, and lack of mobility, I have not applied.
I have been reluctant to apply for SES positions because of the application process and interview challenge.
I know many African Americans who were selected to participate in SES CDP but none were ever selected for SES position. Glass Ceiling still exists.
I think senior management should select/recruit top talent for the SES ranks. Existing SES ranks considered by some to be generally weak and over populated.
I think the programs should have more selections, greater frequency (availability), and a simpler selection process. I would encourage more NTE/Details at SES positions for current GS 14/15, along with the development programs. I think it would increase the pool of candidates/interest without the 18-24 months commitment of the development programs. Details could serve as trial run that could lead to the development programs or longer probation period post details.
Initial application process is very involved.
Interesting to compare SSA SES with other agencies which seem to be more geared to developing Federal employees who will change agencies over career. Not the case of SSA.
It seems an overly complicated example of bureaucracy that does not yield the desired effect. I've known countless SES employees in my 36+ years with the agency, many of whom lack vision, basic leadership skills, communication skills, and business acumen we think our leaders should possess. As a result, I can only conclude that, despite all the paperwork, interviews, and dollars invested, there must be other factors at work that ultimately result in the selections. We pay lip service to process analysis and process improvement, and continue to chase numbers and encourage internal competition. We make changes in processes, introduce new technology, and thrust employees into a new environment without taking time to change our culture. We then wonder why we fail to secure buy-in and why we continue fall short of a collaborative relationship with the Union. There is a need for SES but perhaps the process for determining our future leaders needs a hard look.
Lack of consistency with the CDP program itself - some are 24+ mos. with no certification, some are less than 12 mos. with immediate certification, along with arbitrary selections midstream and little to no transparency with the process.
Make the application simpler and then weed out the applicants.

Per OPM, the certification process is not a long and protracted process. So, why does SSA take so long to certify its candidates. The whole process needs to be revamped and, perhaps, not just run by one person.
Process is very complicated
Recent selections and eventual placement have left me disappointed and baffled as far as the qualities of a good leader and executive. Age over experience seems to have been the theme; inexperience has resulted in repeating failed processes. An individual with experience and enterprise historical perspective would have not tried a failed process twice. More emphasis should be placed on identifying and mentoring potential leaders and training them through FEI rather than a competitive and lengthy selection process that has often resulted in individuals getting a career position, not completing the program and not providing broad, experienced based leadership.
Rotational experiences do not appear to be as productive for everyone as the time requirement would merit.
Selectees seem to have more to do with the components represented on the ERB rather than the actual scores/qualifications of the candidates that make the BQL.
selection process in current component is very discouraging.
Technical requirements can provide a barrier to applying for some SES positions.
The Agency should actively seek out candidates for the position who have higher degrees other than a JD. Agency should also explore avenues to seek out candidates who have different managerial styles.
The onsite process needs to be more objective. Lack of knowledge in management and financial skills when answering by observers detracts from scoring for specialists
The process is arduous, cumbersome and too long.
The process is extremely cumbersome, and I do not feel that appropriate selection criteria is used to make selections. The time investment to go through the application process is too high to simply get a "no thanks" back.
Though I withdrew my application in 2011 for SES because of family conflict reasons, I did find that when I arrived at SSA with seven years' experience as state government executive, but found that the SES candidacy culture dismissive of executive skills and experience developed outside of Federal service. While this is understandable in terms of organization culture continuity, it may indicate a problematic blind spot in choosing agency leaders.
Too much emphasis is placed on the candidate's performance during the assessment center and the interview. The candidate's body of work experience and recommendations from colleagues and executives should carry more weight.
With the concept of corporate work, outstationed employees and even telework becoming the new norm in our Agency, I strongly feel that the SES CDP would see more applications from more highly qualified individuals if the need to relocate on a permanent basis was reduced or altogether removed from the program. I think that within reason, a candidate should expect to have some outstationed and travel duties, but to the extent possible, I see no reason why a potential SES employee couldn't be stationed offsite and travel as necessary. If you look at other corporate models, it is not uncommon for the director of a territory to be situated in a location outside of their "home" area. They connect with their respective leadership teams by means of technology. If the agency doesn't make a change toward this direction independently, I believe that technology, along with other public and private sector competition, may force some of these changes upon us.
With the expansion of virtual details in many areas of the Agency perhaps it is time to modernize the SES program to include virtual assignments and details while understanding that exposure in the various components (physically present onsite) is beneficial and should be incorporated.
30 years of military experience, with 3 combat tours in Iraq, reporting directly to the highest level General Officers (Equivalent to high level SES), has given me more of the following than an 18 month SES CDP could: leadership challenges, interactions with senior employees outside their department and/or agency, interagency training experiences, executive level development assignments, and mentoring.
If possible, more allocations per component, based on the number of GS-14s or GS-15s that applied from a particular component.
The interviewing process seems a little awkward. Maybe that could be looked at and changed.

## *Selection Bias*

A concern that those known or promoted by executives in the Agency have the inside track to selection. Not clear that the selection process is an open competition.

again the process is flawed selectees are generally from my observation UNABLE to lead because most are not selected based on merit only based on the old paradigm of who know and who can be selected who will support and agree with the person in charge.

Age, primarily. Served in senior management role in industry so some of the factors are familiar, as I was a change agent within a company in a "brown fields" industry. Investment in a younger person is considered a better ROI.

Agency preference for youth and naivety over experience.

Components filter their recommendation towards favored employees so we need to remove this obstacle. SES responsibilities favor those with minimal family responsibilities and the incentive (personal or monetary) is insufficient for the sacrifice. I believe that once in the SES one cannot control choosing preferred assignments, but rather is assigned to posts where needed; perhaps a fast-track and a gradual program is needed as an incentive.

Experience and longevity are no longer respected factors under the current informal process within OAO. This process denies access to the vast majority of people who would otherwise be interested in SES as attorneys and adjudicators. Special projects and responsibilities are given to a few without competition, and without acknowledgement that those projects lead to promotion or change in position to SES. The current chief AAJ position is stated to be non-competitive and several appointments are from the youngest and newest AAJs. There was no special training such as completion of leadership development program, nor prior management experience required. Thus, there is the perception that experience is irrelevant, and even experience gained by working in different components is not valued. The current system in OAO is arbitrary and leaves some of our best minds sitting on the sidelines while relatively inexperienced people are given positions and subsequently developed. There are no failures in the current system, so no vetting and weeding out of those not well suited to leadership. The formal process of selection and development should be the mandated and only process so that the public may benefit from placing individuals in leadership decision-making roles who have proven their qualifications to lead and did not obtain their position first by virtue of proximity to current leaders. The current selection and post selection training process results in the organization having to repeat mistakes, deal with rookie leader mistakes, and the morale issues that come when people who were better suited to the role are left on the sidelines and subject to supervision by those selected who may or may not rise to the challenge. Merit system selection has been bypassed and should not have been. Experienced individuals have a body of knowledge and experience that should be evaluated to see whether it has led to a matured and ready leader. We need more great leaders, not succession planning conducted by a few who select based upon unknown and unknowable variables from a very small pool of individuals.

Few positions and pre-selections

Having worked with senior executives in the past, I find the selection process to be more political then actually selecting qualified individuals. Please do not encourage Senior Executives encourage employees to apply unless they are going to support these individuals as there is a concerted effort to submit the application, family support, and huge disappointments at the end. The agency wastes plenty of money and time reviewing documentation that is not warranted when the DCs already know who they are to select. The agency needs to reevaluate the process, save money and time for all. This is the 21st century, and coming from the private sector, their process in selecting future leaders is expedited seamlessly with less cost.

I aspire to one day hold an SES position. I feel that an SES position would allow me to share the experience that I have gained in frontline operations, and exercise proactive leadership that our changing agency requires. I am discouraged that the SSA SESCDP does not encourage FO management to apply for the program. Current SES staff who worked in the field do not actively advocate for the program and reach out to current FO managers to prepare them for the application process. When they do, it is usually right before the application is due. This almost sets FO managers up for failure when an executive nomination is needed, and a short time line does not permit a proper request. The exclusivity of SES gives the impression that it is a members only group, and those who are selected are given the information to apply, while others are intentionally left in the dark. FO management are not even notified of who were selected into SESCDP/ALP to contact for guidance, or to look up to as mentors, which is very sad, as this information is promptly shared within HQ. I was quite discouraged when prior SESCDP classes were opened off the street candidates with no SSA experience, but employees whose leadership was cultivated within the agency were not given notification of how to apply, or that the posting existed on usajobs.gov. While outside perspectives and experience is valuable, so is the morale of the existing work force. Having a level and accessible playing field



would make the acceptance of outside candidates over current SSA managers much easier to entertain. The majority of SES positions are on the East coast, which is an easy transition for applicants who are local to the area and can easily commute home to family and friends. For applicants who are at a distance, decisions of leaving or relocating family must be made. The SES seems to be sacrifice, at the expense of family and stability, for career success. SSA has a lot of talent, and all of that talent is not unique to the Baltimore/Washington, D.C. area. If the majority of SES candidates come from the HQ area, it is not necessarily the best of the best, but actually the best of those who were local/mobile. Many of the people who are much smarter than me, have ideas that could take the agency to a better, more efficient and proactive place, are my colleagues on the frontlines who will likely never be given the opportunity to join the ranks of SES. With the integration of telework and virtual work sharing, I wonder if the possibility of creating additional SES vacancies outside of the Baltimore/Washington D.C. area has been considered. I see the SES as an opportunity to create positive change within the federal workforce. Sadly, I do not feel that the opportunity is accessible to me as an FO manager. I appreciate that this feedback was solicited, and offer my opinion not in complaint, but in hopes that my perspective and the perspectives of others will be used to create a program that prepares the next generation of SES leadership within SSA, and creates a diverse group of candidates. Thank you.
I have the impression that the SES program is geared towards younger people, and that as a person in my later 50s I would not be selected.
I see the recent selections and for the most part they seem to be for individuals who have far less experience than I do. Unfortunately, I believe the agency no longer values employees with experience and knowledge of SSA's programs. In the 1990s I worked in SSA Operations and was selected for a very competitive rotational program. I know I have the experience, knowledge, management and leadership skills to be in an SES position, but I don't want to spend the time to apply when I believe there are few selections of candidates over a certain age.
I think the selection process is weighted toward applicants who have already completed formal developmental programs.
I think the SES doesn't necessarily pick up the "best and brightest" but rather the people who are most mobile and well connected. The agency is missing out on contributions from innovative thinkers because of the mobility requirement.
I think unlike other federal agencies, SSA is only interested in creating SES from its field office personnel so those who come to SSA with advanced degrees in economics and public management are never encouraged to try for SES because the deck is stacked against them from the beginning.
I was told indirectly that they are not interested in promoting white males. They only want minorities.
I would be interested in the CDP or SES positions, however, it appears that selections are based on location (HQ) and/or the influence of current SES developing protégés based on interpersonal relationships. I hope these programs are streamlined, become more transparent, and diverse in the future.
If you are not one of the "favorites" of management, you do not stand a chance in the process. It is clearly rigged for those with support from management. I would not have that support.
I'm not within the demographic currently being pursued for those positions.
It appears if upper management does not tap you on the shoulder and say apply for SES; you are wasting your time. It appears to be a pre-selection process; thus omitting very talent and strong employees throughout the agency.
It appears that most selections are from the Regional Office who enjoy most details.
It appears to be predetermined.
It has been a long tradition that candidates are chosen who have a certain relationship with SES in the organization. Basically, if you don't have anyone who has stated that they are willing to sponsor and help you develop then you are wasting your time.
It is my perception that SES members are looking for people with similar character traits and personality to join their ranks. During my time with SSA, I have learned that our most underutilized asset is our diversity. Unfortunately, I do not think that this view is shared by those in prominent positions within SSA. As a result, I do not think that I would be an effective SES member.
It seems to be targeted to Regional Office employees only. The field is sent an email about the program but developmental opportunities aren't really offered. Money may be factor.
Management is not really interested in its' experienced employees or those who have a truly intelligent and rationale opinion to share. Management also only wants a select few (those who tend to parrot their decisions and choices)to be involved in molding the direction of the agency and in policy considerations for the future.

Qualifications seem somewhat ambiguous. I have never been approached by any senior level people encouraging me to pursue this option, yet I know of other who have been approached. Not sure why some are chosen and others are not.
Seems the program has in the past been preselected based on affiliation with other current SESers.
Selections for CDP are suspect. Instead of selecting people who have excellent people skills who others will indeed want to work for, some are selected for other skills (e.g., project management or technical knowledge). There should be a place for those folks but NOT leading and inspiring others.
The candidate that will be selected for a position at SSA is a fait accompli prior to the job posting. A 'fair and open' application process is required to comply with the rules, but it is just a facade that wastes everyone's time except that of the pre-selected candidate. If someone wanted me to join the SES CDP they would have told me to apply. Absent that, why in the world would I waste my time?
The main concern I have is that unless you are sponsored by someone in a "good" political position, you will not be selected. My second concern is the requirement to work in various locations/being mobile. Not something I wanted to do while raising a family. Additional Comments: - At the GS14 level the next logical step is the GS15. As an Outstanding employee there is no opportunity for promotion within the Office of Systems. We "hear" that we are too top heavy and that there are sufficient GS15s already.
The only time I applied several years ago, I scored very high. When I did a follow-up session on my application and non-selection, I was told there was an emphasis on selecting minorities, and that was the difference--just not enough spots for non-minority males. Not sure it's worth going through that again.
The process is not fair, especially if your management is not supportive. If you are not in favor in your component, you will not receive support and therefore are not considered.
The process seems to be rigged. It's not what you know, but who you know. Candidates seen to be pre-selected and the process does not appear to be competitive.
There is a common belief that the SES program is a "club", and you need to be of a certain look, background, social group, etc., to REALLY have a chance for selection.
Very prevalent impression it is a foregone conclusion in the regions that the ultimate selection(s) are known long before the process ends.
Why bother, selectees are preselected and there is very little diversity in the process. The exclusivity in the selection of candidates essentially excludes minority women.
With only a few token slots given to "over 50" candidates and non-diverse candidates, it was not worth the application work which takes hours. The results do not show fairness. Its the same with the ALP program.
As noted in previous page. There is the expectation to be a GS-15 prior to SES. While that is somewhat of a reasonable expectation, GS-15 competitive positions are few and far between. So GS-14s are limited in their ability to apply for, or at least their expectation of being selected for, the SES candidate program.
<i>Not Worth It</i>
A GS-14 and GS-15 make almost just as much money. I've seen the way the execs treat others and I have absolutely no interest in being subject to their demands 24/7.
All the SES positions work late every day and on weekends. Private sector positions with that level of responsibility make several times more a year.
As stated - prior to going through the Advanced Leadership Program I was certain SES was in my future. However, after seeing how hard they work and their add'l demands, for not all that much more money - NO THANKS. I also, as a single, childfree man would worry I'd be sent somewhere I did not want to work/live. xxxxx
Considering how much bad press there is in the US regarding the SES programs (such as at the VA), why does it behoove me to apply for this program when I can be fired on sight for something I have not have had any involvement with? Rather, I can stay at a GS-14/15, keep my job security, keep my location secure, and be able to have a work/time balance happiness. And since the pay does not match the stress you'd be under, it doesn't make sense either.
Entry-level positions in the private sector earn more; spineless and reckless politicians insult and denigrate SES officials; the responsibilities and liabilities are enormous, without commensurate respect nor compensation.
Expectation you give 200% and work 24/7 when assigned in headquarters. No one should have to commit to that degree. It is possible to balance both and be an outstanding employee.

Expending the resources and effort to participate in the CDP and SES is not worth the current rewards received. The application process discourages participation. Guidance, involvement, engagement, and mentorship are needed by agency executives for the development of future leaders. As it stands, the CDP and SES is not suited to what I want for a future career trajectory.
Having worked in a field office for 35+ years, I feel there's more of a need to stay in the field to help serve our claimants on the "front line".
Having worked with SES's at another federal Agency (within DoD), it doesn't appear that, at least at the AC/DAC level, that SES's here at SSA have any real authority -- it seems like almost everything has to go up to DC/ADC level for even the most minor of things. At DoD, being an SES is equivalent to being a flag-officer and is a BIG DEAL, and they have the authority to approve things. Here at SSA, not so much - and unfortunately that lack of authority permeates downwards so that front-line supervisors don't have any real authority either. I think we're all just cogs in this huge bureaucracy with multiple layers of "supervision" with little authority. So I don't see the value of growing into an SES at this Agency -- perhaps another one where SES's have real authority.
High stress position; at this point within SSA, rank and file SESers appear to have limited ability to influence outcomes in the agency.
I achieved my career goals. I am not interested in becoming an SES. I am happy at my current grade level and my current job responsibilities.
I am a congressional affairs person. SES would remove me from the work I know how to do best and enjoy.
I am at a place in my career tenure that would make me question whether SES would be worth disrupting my life, changing locations, etc.
I don't want the perceived pressure that would come with an SES position. I already have enough pressure in my current position.
I do not think the rewards are sufficient for the difficulties and burdens that likely follow.
Inadequate salary, bonus money, and fringe benefits compared to comparable positions in private industry. When you become SES, the increase in responsibility and the demands on your time go up way more than the relatively minor increase in compensation. It is not worth it.
It seems like SES requires a lot of training and job flexibility as well as increased paperwork and the pay is not seem commensurate with the work.
Life change is so drastic and pay is not commensurate with the change.
Not interested in late hours, being away from family.
Notwithstanding personal reasons captured earlier in the survey, I have worked with and for multiple SES members and find the expectations as to what can/should be accomplished extremely grueling for the individual. They all accomplish great things, but the time constraints and sheer volume of expectations seems to wear upon them.
Personal risk (such as congressional oversight, political scrutiny, etc.) outweigh the benefit of public service.
Reasons for not applying are not specific to SSA. I've been in several other agencies. The responsibilities, workload, politics involved, and requirement to be mobile (both within the agency and geographically) far outweigh any increase in pay/prestige that comes with being SES. It is just not worth it.
The amount of additional tasks SESers are required to do (many of which seem like fluff), along with the increased risk due to lack of predictability in the location of work/role you fill, and huge increase in time commitment outside of normal hours and negligible increase in pay make the tradeoffs tilt highly in favor of the negative.
The current mood in Washington is to target and fire SESers, and the pay increase is minimal. As with people who go into politics, you wonder about their state of mind. And to date, the people who have gone through the SES program are less impressive than those who were promoted without it. Grooming is nice, but in the field promotions for excellent work is better. I expect your better leaders will not be pondering the program but rather step up to meet a need when called upon.
The money isn't worth the headaches!
The SES positions are fine for those with management goals. I would rather see the GS-16/17/18 slots brought back. I think SES gives up a lot of protection for their slots.
Very little financial reward for some severe life balance loss.



Having to find your own assignments seems like a lot of work. SES staff is constantly moved around the agency.
No guarantees where you will end up! Very political
For the time being, I am trying to assist OIG combat fraud, abuse and misuse in the position I am currently in with the tools and responsibilities assigned to me. Not sure if SES expectations would allow me the same degree of flexibility to accomplish the same or more regarding upcoming efforts to combat fraud, abuse and misuse with Predictive Analytics tools and methodologies that I am learning about.
<i>Age/Near Retirement</i>
I am 72 years old.
I felt that my age would be a factor in the decision making process. Also I did not want to apply for a position when someone who was younger and could serve longer would possibly be displaced.
I'm too old -- will be 69 later this year.
Ask I indicated I feel it is too late in my career to participate/apply for a SES position.
At age 60 I am too close to retirement to start in such a program.
At the end of my career.
At this point I am too close to retirement to be SES. Also the mobility clause really influenced me not to apply. Where I live has a major influence on my work life balance.
At this stage of my career I am not interested in SES positions.
Considering retirement.
I am at the tail end of my career and would not want to shortchange the agency by only having a short-term commitment. The opportunity to apply for CDP or SES positions came along too late in my career.
I believe this is a great program. As I am considering retirement in the not so distant future, it would not be fair to take time away from others to review paperwork etc. when I'm possibly leaving.
I have been with SSA for 38 1/2 years, and plan to stay for 42 years. I do not know whether it would be in SSA's best interest to train me and when I might leave in 3 to 4 years.
I plan to retire in the next 3-5 years and don't really think there is any point.
I wish I had received the encouragement in the past, but I never had a supervisor talk with me about the program. I have 30 years' experience in management and have much to offer. I am now looking forward to retirement.
I work to live; not live to work. SESers are expected to do the opposite. SSA's lack of succession planning will make managing much more difficult in the future. For example, I informed my executives months ago of my plans to retire. Any organization with a sound succession plan would have placed someone under my wing. Unfortunately, SSA is waiting until I retire to replace me and letting nearly 40 years of experience walk out the door without any knowledge transfer.
It is too late in my career.
just an FYI for the survey that I am new to my current position and within 5 years of intended retirement. Thanks!
my time in the government- I possibly have about 2 years left to have 41 years.
Nearing retirement within the next few years.
Plan on retiring in the next couple of years. I don't believe it would be beneficial to the agency
Planned retirement after 40 years' service on 07/03/15

Prior to 2013 family commitments kept me close to home, since then my decision to retire within the next two years made my applying for the SES inappropriate.
when I was younger, I didn't have the mobility==now that I'm older and more mobile, I will be retiring!
Will be retiring soon
<i>Timing</i>
As soon as my children are a little older I plan to apply for the CDP. If an SES position becomes available in OGC, I will apply for it. I may apply for other SES positions in the future.
Being an executive is not the same as being a glorified technician, though at times, with some, it's hard to distinguish between the two. Introspection is important to me. Ensuring I know how to do my GS-15 job well before moving on is also important in order for me to be an effective executive. Thinking you are ready vs. being ready or two different things. I want to make sure I can contribute as an SESer; so I'd like to learn as much as I can as a GS-15 before making the leap.
From my understanding, the SES Positions is for managers will plenty of years of experience. I have just begun my DM position and am striving to learn this position well before I seek elsewhere.
I am a single parent and my child is leaving for college in the fall. I would then probably apply, however I am not a "yes" man which would probably hurt my candidacy.
I am currently participating in a regional LDP. It is not time to consider SES, but the program is on my radar.
I am highly interested in the SES CDP. I have great skills that would translate well into future growth and success for me personally and for the benefit of the agency.
I am not sure if I can apply for SES positions without first completing the CDP first. I have received encouragement from my previous four supervisors as well as from my subordinates to strongly consider the SES. Therefore, I plan to apply in the future. Thank you for including me in the survey and for taking the survey.
I am very busy in my current job, so I don't always pay attention that a position has been posted. Also, at this point in my career, I would consider applying directly for an SES position rather than applying for the SES CDP.
I feel I would benefit from more time in various lateral positions in order to be well rounded and better prepared for a future SES role.
I feel my career at SSA is still in the beginning stage and that some experience as a supervisor would help before applying for the CDP or SES positions. I am currently in a supervisory position since August and would definitely consider applying for the CDP or SES positions in the future.
I feel that I need more time to develop my managerial expertise as a HOCALJ.
I have been encouraged by SES to apply. I fully intended to apply for the last class and even filled out the application. However, DCHR would not accommodate the fact that I was on military duty for the first half of the application period. When the process requires SES endorsements, those SES who want to give endorsements need adequate notice and time to draft endorsements.
I plan to apply for the next SES/CDP. I made significant improvements in the process in my current office, but I still have work to do. Thank you for the opportunity to comment on the SES/CDP process.
I promoted to my target position GS-14 Level 1 Manager in my hometown office/district in 11/2013. I participated in Region 9's leadership development program in 07/08. Since, I have served in 9 different positions/offices/locations (two states and two different components i.e. Field/Teleservice). For now, I am working on learning my new job, developing my skills and abilities to prepare for SES. As well, I am working on completing my degree in anticipation of an SES career.
I simply do not feel I am ready to be SES.
I was hoping to get into the SSA or SSA OIG LDP programs first and then tackle the SES CDP program in a few years. My resume shows completion of extensive leadership training opportunities and dozens of Agency and outside Agency awards. I really wish to advance into leadership and managerial roles and supervise employees, but I encumber a very technical position and many SESers and upper level management here in SSA tell me supervising employees is a huge headache. I need opportunity as a very technical person - if given the opportunity, I can guarantee you I will shine and exceed expectations.

I would like to apply in the future. Recently, I felt that I lacked the necessary experience to be considered after having reviewed the sample answers.
I'm relatively new to my current position (10/13). I have a lot more I can accomplish here before I feel a strong urge to seek new challenges.
I'm very grateful to be a part of this agency and have been blessed to have several promotions over the years. I feel very strongly that I must master one position before moving on to the next. CDP and SES just seem to come up at times where I have just been promoted or started a new position. I certainly appreciate the opportunities, but to leave a staff so soon after just being placed there is a detriment to the team itself. And, I don't feel like I can be a true benefit to the next position without taking the time to learn. So, I guess it's just a matter of mismatched timing, but that is certainly not the fault of the CDP or SES programs.
It would add a lot of stress to my life -which on a personal level is changing, so now is not the right time for me.
Just now in a position professionally and personally that allows for serious consideration for applying for such a challenging assignment.
Maybe later in life the role will fit me. For now, the personal, not financial, pay off does not justify the toll/cost.
Need some more experience and skills before I consider applying.

### *Management Support*

Director and executive management in my area to do encourage, or mentor the process to apply for CDP or SES positions. We tend to get caught up in the day to day work and do not make time for opportunities such as these.
First, this question is worded to ask why I don't apply when I usually do apply when I know my supervisor will support me and I will receive a fair opportunity to compete. Several SES officials have suggested I apply; however, I had a supervisor who in my opinion clearly showed favoritism based on race. Therefore, I would not have been supported and my accomplishments, performance and skills would have been overlooked. Unfortunately, some of our leaders do not understand that a small number of people still make decisions and judgment about others based on race, ethnicity, gender and other factors that should have no place in the decision making process.
I feel that some members of management are reluctant to support employees' participation in leadership development programs, including SES, because they see the programs as taking employees away from performing their day-to-day jobs. This reluctance, when it exists, protects the individual component and its productivity for the short-term, but harms the overall component and agency interests in the long-term, to the degree people with excellent leadership potential do not pursue these opportunities.
I have a strong feeling that the SES application process is biased toward minorities and strongly influenced by affiliation with certain groups, e.g. Advisory Councils. I have worked hard, produced results, achieved a Outstanding overall performance rating but I've never been approached by anyone regarding the SES. Several colleagues have told me that they have been approached by SESers. I assume that's how it works. I find value in my job every day and am quite content not to apply since I have not been approached/sponsored. Thanks for seeking input.
I have been under my current supervisor for 4 years and they are not supportive and does not appreciate the efforts I put into my current position. I have received all 5 for the previous 6 years prior to my current position and am not supported.
I have been with the Agency over 40 years and have worked in management over half that time. Never was I encouraged to seek any candidate program nor was it really explained. In addition, I am not physically mobile, so going to other locations is sometimes a hindrance. I have enjoyed a wonderful career with the Agency and I am thankful for all the opportunities that have been afforded me.
I have had outside my division SES'ers discuss the program with me and encouraged me to apply. But never my own executives, so I suspected that they would not support me.
I have never been approached to consider being a candidate for the SES program.
I was not encouraged to apply and therefore, interpreted that as not having the support of my supervisor. I am very interested in the development that the SES Program provides.
I will never be in a position to apply for an SES position because the organization of which I am a part is not the least bit interested in helping me develop my career. Age discrimination is rampant in SSA. It begins the moment a supervisor decides who they want to groom for promotion and who they will leave behind. Once the younger people

get the significant assignments, it is easy to justify their promotions. If the older individuals are not ever assigned significant work, they are not ever part of the competition. If I sound bitter, it is because I am.
I would likely have applied a number of years ago if I thought that I would have had the support of management. However, I had such a negative experience that I decided I would not have a chance at being selected. So, I am waiting to retire.
If past supervisor wouldn't support us for ALP or Excellence in Govt, there was no way we could get in the front door of SES.
Main concern is getting the development and support of current leadership.
My observation is that candidates for CDP or SES positions who are not "informally sponsored" by a recommending official will not have their application even considered for selection. Folks who submit well written and thoughtful applications supported by very good performance reviews but are not the "it" applicant, will not receive consideration based on merit. Hence, no recent applications from me.
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One of the SESers for whom I work said "Why would you want to go SES--you have the best job in the agency right now." The other was relatively new to our component and did not know me very well professionally. He was given the task of writing my recommendation to the program. When I reviewed the recommendation, I did not feel it was sufficiently positive for me to go forward with my application, although I had already documented all the core skills necessary to apply. For the 13 years prior to coming to SSA, I was a DDS director for a medium-large state. Both the DDS and I were frequently given awards by SSA for performance, management skills, collaboration, and innovation. During my first few years in this component I was managing a project which was then--and is now recognized as a "game changer" for the component. I have personally received 5 Commissioner Citations from three different Commissioners. Yet the recommendation I received from someone who had managed me a year or so was, in my opinion, tepid. I was clearly not the person that senior management wanted to put forward as the component's candidate. I have no desire to put that kind of effort into another application.
References from SES level executives not readily available, especially for employees who work in the field office component.
sometimes when you do your job very well and are surrounded by people who do not work, the tendency is for your management to be interested in solving their own problems by blocking high performers from leaving for new opportunities; high performers need a way to get into the development programs -- without direct line mgmt approval -- e.g., have people qualify on their own merit, instead of merit plus recommendation.
Supervisor never talked about it.
The AC in my office is very selective as to whom they support for promotions (i.e. Per promoted staff, they were called to file for a promotion and then were promoted). I do not see my AC supporting me. I am not encouraged to file the way others have.
The reason I haven't applied to an SES CDP is because my current Associate Commissioner does not support my upward mobility. I have a Master's Degree and I'm an extremely hard worker, but the culture in Operations is that you have to be the AC's friend or part of their outside the workplace clique, before I am "inducted" into the family. There is fear placed in the heart of employees to speak up against wrongs. Just recently, the Commissioner visited our organization and we were told beforehand that we had to tell our staff to not ask questions. All questions staff wanted to ask had to be vetted through the AC and then the Director selected who she wanted to ask the question. Because of this barrier, so many good questions went unasked of the Commissioner. There are great leaders, such as the Commissioner in this Agency, who want to make a change, but there are bad ones as well at the Executive levels. This is very unfortunate for some very hard working employees, who might have without knowing burned a bridge with an Executive; especially a high powered one. I think Executives need to be always professional and nurture all their employees regardless of personal feelings of like and dislike. I doubt in the current environment that employees who are not supported by their AC and/or Deputy Commissioner will ever move into the SES ranks. Usually GS-14s are not supported in HQ, because they still have to "pay their dues" at the GS-15 levels according to some Executives.
The requirement for a letter of recommendation from a current SES member is difficult for a field manager who does not interact regularly with SES. I took it to mean that if someone in SES had not invited me to apply and offered to write such a letter, met once or twice to write a letter, nor would I expect them to have the personal knowledge of my abilities required to make such a recommendation. I had intended to apply based on the outreach on the DCO

call, but then realized I had not been "sponsored." I was prepared to complete every other part of the application, but that one stumped me.
There is a total lack of management encouragement other than pro forma statements. Those they want they encourage.
<i>Not Interested</i>
Wanting to stay in my current field, Information Technology.
-honestly i have no interest. I am retired military and this is a lifestyle maintenance job until i fully retire. But if i did, the next 2 points would influence my decision. -if current AC of Component I work in represents a typical SSA SES, I want nothing
I didn't consider it.
I have been very satisfied with every position I have held from a grade 7 benefit authorizer, to grade 11 claims, 12 quality reviewer, 13 program leader, and now branch chief. I have had a very satisfying career. This is my last job. I have no desire to advance my career and am far from complacency in my current position. Agency resources continue to dwindle and over the last couple of years, more and more administrative responsibilities are being placed on management. I feel we're constantly being backed into a corner, trying to accomplish the day to day work; addressing issues through crisis management and handling the "flavor" of the month priorities. More and more work is being "thrown over the fence" and accountability is a thing of the past. Although, I wonder if accountability was ever there; the blame game is our best defense. Poor performers cannot be dealt with effectively because of the administrative burden. Morale amongst our top performers is severely affected as a result. Burn-out is inevitable if not already there. Yes, without question, these are turbulent times in the government. As a result, I feel our goals/priorities are becoming more and more unrealistic or attainable. We seem to have time/resources to invest in fixing things after that fact; but not the time to properly plan/execute the first time. Lately, I've been questioning my effectiveness as a manager.
I have no interest in an SES position
I have no interest in any senior management position; I have never had an interest in any senior management position.
I see myself primarily as an adjudicator and would not like to lose that skill.
I would rather be a an ALJ or an AAJ.
I'm happy with my work-life situation.
I'm pretty much stretched to the limit now as it is.
It's actually quite simple: I'm not interested. You all make it sound as if everyone should care for an SES position. You should have had as first question in the survey whether the person is even interested in the SES program, and if not, be done with it.
I've think I've accomplished as much if not more than if I was in the SES program. It is a matter where the right place for me to be to best help this Agency.
Just not interested at this point in my life. Happy with current position.
long term goal position has not been SES but uncertain about where that job is headed
never had an interest
satisfied with current position and still learning to be a good manager
Although I am not interested in an SES position, I think that Agency leaders could reach out to potential applicants to encourage participation. Obviously, mobility is a factor that applicants need to consider.

### *Unlikely to be selected*

Current SES vacancies indicate you must have been in the GS-15 grade for 52 weeks. I was interested in applying for the CDP, but I was told it would be highly unlikely a GS-14 would be chosen unless he/she was already in Central Office.

Experience applying for other positions suggest I would not be selected.

Have never made it to the interview stage of the ALP (have tried twice) so I believe I would not have the necessary skills to get further in the SES application process either.

I am an introvert by nature. Based on my observations of people in the SES candidate program or in those positions, introverts do not fare well.

I am not sure I am "in the know" or, have backing/support from executives who make decisions.

I didn't think I'd make the cut since I wasn't sure my background/experiences were strong enough.

I enjoy practicing law. In my observation, SES folks are more managers than practitioners. Essential to the operation of an organization, but it would be a major shift in professional focus to no longer practice.

My main concern was the amount of time I would need to invest in the application process weighed against everything I had going on in my home life and work life at the time. Combined with the fact that the number of 14s selected are extremely limited and I can't cite supervisory experience (being a tech 14), my chances seemed so low that it wasn't worthwhile.

The last application I sent (for the ALP) I was not selected and received no feedback. Really this is a lot of information to submit and receive absolutely no feedback. Also, my current supervisor is very unsupportive on any career development on my part. And lastly, my impression is there is a fair amount of what I might call pre-selection for these positions--true or not that is my impression.

I do not think I would be given a fair chance to succeed in the program.

### *Pathing*

A mentoring program for those considering SES would be helpful to prepare for and become oriented to expectations and challenges of SES

If the budget/financial experience continues to be a requirement, many exceptional ODAR attorneys will never be eligible for the program. Also, the agency needs to make more opportunities in general for excepted service employees.

I'm in a technical role, not managerial role. My understanding is that SES is for a managerial career.

It seems that the goal of maintaining a certain staff to supervisor ratio is at cross-purposes with the leaning of the SES program to selecting those in supervisor roles. It would be good to create other paths to the SES opportunity.

many programs limit excepted service participation which is generally what all agency attorneys are hired under

### *Education*

Do not feel by only having an associate's degree that my package would get more than a cursory look. My experience level comes from practical experience not from sitting in a class.

I have not finished my undergraduate degree, and I believe the agency looks down on employees that don't at least have an undergraduate degree.

I would love the opportunity, but it seems that because I do not have a college degree, there is no chance of getting selected. I would think the many years of experience would count...



## *Other*

All SES participants should spend time in Field Office operations, learning about our delivery of services to the public.

I believe SSA is not developing and maintaining the expertise needed to keep this agency performing at the high level expected by the public. We are losing highly technical staff and we are not preparing younger staff to take over the technical duties. The agency's efforts to reduce the supervisor to employee ratio is also short sighted for the same reason. We need younger managers "waiting in the wings" to take over when "seasoned" managers retire.

I cannot stress enough the significance of the lack of consistent, nationwide protections for gay and lesbian persons influences many of us not to apply. There is no federal law that consistently protects LGBT individuals from employment discrimination; there are no state laws in 29 states that explicitly prohibit discrimination based on sexual orientation, and in 32 states that do so based on gender identity. In addition, our marriages may not be recognized in all States, much less our families should we have children. The thought of being sent to work in certain States is absolutely terrifying when you consider that you could lose recognition of your children, your job, your right to visit your spouse in the hospital, etc.

I have done my research and am informed.

I have great respect for our agency leadership. I would really like the process to yield the very best candidates to move the organization forward.

I would like to be part of the SES program.

I would suggest establishing a portal for the Agency's SES staff to record mini presentation on the SES process, roles with the Agency and challenges along with relevant leadership competencies. These presentations could be viewed by interested applicants throughout the agency. Also, quarterly "brown bag" Lync sessions should be established to allow for live Q&A with SES personnel.

I'd like to see more diversity in the SES ranks. Conversations about the SES program should happen more frequently for effective succession planning.

If I do end up in an SES position, it will be within my component, and the selection will be based on component-specific skills, so I have no interest in the CDP. There haven't been any SES openings here in the time I've been working, so I haven't had to give serious thought to applying for one yet. I will consider it carefully when the time comes.

Many of these programs are specifically developmental, or promotion-oriented. It would be nice to have such programs available to those who are not looking to change jobs, but want to learn more about how SSA works and gain additional experience to make us better at the job we already have.

No. However, this survey was nicely organized and worded. Great Job!

Overall, I think there is a lack of good leadership development programs at SSA. I have not received adequate training for my management position. There should be structured program for all managers, including a mentor. The training should not be offered via VOD. It should be periodic in person training where managers can network and share problems.

thanks for having this survey

I have been acting in an SES position in OGC for more than two years. I love my job, enjoy working with attorneys, and want to stay in OGC. I hope to be able to compete for my position sometime in the future.



*OGC: Here to Serve*  
*Excellence Integrity Judgment*

## OGC SIGNIFICANT LITIGATION BRIEFING



# Litigation Overview

- The litigation OGC handles falls under two broad categories: Program litigation and General Law litigation.
  - Program litigation involves challenges to, and issues concerning, SSA programs.
  - General Law litigation involves challenges and issues that are unrelated to SSA programs.

# Program Litigation

# Types of Program Litigation

- Although most program litigation involves individual claims for benefits, some litigation may involve multiple claimants
  - Class actions
  - *Qui tam* cases
  - Other cases (*e.g.*, constitutional challenges)

# Types of Program Litigation (cont'd)

- Class actions—generally involve a challenge to an agency rule or policy that affects a large number of claimants
- *Qui tam*—an action brought under the False Claims Act that allows a whistleblower to receive part of the funds recovered by the Government
- Other significant cases—may involve a single plaintiff or just a few claimants, but involves an important issue (*e.g.*, constitutional issue, same-sex marriage)

# DOJ Staffing

- Most individual program litigation cases are handled by U.S. Attorneys' Offices or OGC attorneys (as Special Assistant U.S. Attorneys)
- Significant litigation may involve:
  - U.S. Attorneys' Offices
  - DOJ Civil Division, Federal Programs Branch
  - DOJ Civil Division, Civil Fraud Section
  - DOJ Civil Division, Appellate Staff

# Program-related Class Actions

- Historically, class actions tended to involve challenges to disability program policy
- Examples
  - Evaluation of pain
  - Treating physicians' opinions
  - Continuing disability review standards
- 1980s—Saw a historically high number of program-related class actions—over 40

# Program-related Class Actions (cont'd)

- In the last two years there has been a significant increase in number of class actions and significant litigation against SSA
- Fiscal year 2014—4 class actions or other significant program cases filed
- Fiscal year 2015—18 class actions or other significant program cases filed
- Fiscal year 2016—9 class actions or other significant program cases filed (not including over 100 individual fraud redetermination cases that may involve constitutional and statutory claims)

# Program-related Class Actions (cont'd)

- Most current class actions don't involve challenge to disability program policy
- Broad range of issues including:
  - Same sex marriage
  - Treasury Offset Program
  - Windfall Elimination Provision
  - Fraud redeterminations



# Same-Sex Marriage

- Murphy (D. D.C); Williams (N.D. Ill.)
  - Title II surviving spouse benefit applicants from states without same-sex marriage, after Windsor but before Obergefell
  - Murphy: Agency issued fully favorable decision to named plaintiff; plaintiff dismissed case in March 2016
  - Williams: Appeals Council issued fully favorable decision after court remand
- Held (N.D. Cal.)
  - Class action: SSI claimants whose marriages were recognized after Windsor, resulting in overpayments caused by the delay in recognition
  - District court dismissed due to lack of jurisdiction; while case was pending appeal, SSA made a policy change that addressed issues raised in the case, and plaintiffs voluntarily dismissed their appeal

# Treasury Offset Program

- Grice (D. Md.) and Heard (D. D.C.)
  - Class actions challenging collection of delinquent overpayment debt from beneficiaries' tax refunds
  - Court initially denied SSA's motion to dismiss on jurisdictional grounds
  - After SSA waived named plaintiffs' overpayments in both cases, the district courts dismissed cases as moot
  - Cases are pending appeal in the Courts of Appeals for the Fourth Circuit (Grice, now captioned Hart v. Colvin), and D.C. Circuit (Heard)

# Fraud Redeterminations

- Martin (E.D. Ky.)
  - Class action: due process challenge to suspension of benefits for claimants connected to Eric Conn and challenge to fraud redetermination process
  - District court dismissed for lack of jurisdiction, and plaintiffs' appealed to the Court of Appeals for the Sixth Circuit
  - Case is briefed and will be argued on December 2
- Justiniano (D. P.R.)
  - Class action: challenge to redetermination process for fraud cases in Puerto Rico
  - District court dismissed the case for lack of jurisdiction on August 3, 2016, and no appeal was filed

# Fraud Redeterminations

- Robertson (S.D. W. Va.)
  - Case involves same issue that was raised in Martin
  - On October 5, the district court dismissed the case for lack of jurisdiction and denied plaintiffs' motion for class certification
  - On October 18, plaintiffs filed an amended complaint, raising similar issues to the complaint the court dismissed

# Fraud Redeterminations

- Individual Cases Involving Redetermination Process
  - Redetermination hearings in Eric Conn fraud case have resulted in over 100 civil actions seeking judicial review of the agency's unfavorable redetermination decision
  - District courts have reached conflicting results on the validity of the process

# Fraud Redeterminations

- On October 12, in Hicks (E.D. Ky.), District Judge Amul Thapar granted plaintiff's motion for summary judgment and held that the agency's fraud redetermination process denied plaintiff due process because she was not allowed to challenge the finding that there was reason to believe fraud was involved in her application.
  - The court issued orders in six other cases adopting the reasoning of Hicks.
  - The agency's Rule 59(e) motion seeking reconsideration of the court's order is pending.

# Fraud Redeterminations

- On November 15, in Carter (E.D. Ky.), a consolidated case involving nine plaintiffs, District Judge Danny Reeves granted the agency's motion for summary judgment and upheld the constitutionality of the fraud redetermination process against a due process claim identical to the claim made in Hicks.
- On October 6, in Perkins (E.D. Ky.), District Judge Joseph Hood denied plaintiff's motion for a preliminary injunction. The court found that plaintiff had not established a likelihood of success on his claim that the redetermination process violated the statute and due process.

# Disability Policy

- Consultative Examiners
  - Hart (N.D. Cal.)
    - District court certified a class of individuals who had a consultative examination by a specific CE provider in California
    - Parties agreed to settle the case, and the district court gave preliminary approval to the settlement on November 9, 2016. The court will hold a final approval hearing on March 16, 2017
  - Keovongsa (S.D. Cal.)
    - Class action challenge to use of a specific CE provider in Southern California
    - District court dismissed the case on June 20, 2016



# Disability Policy

- Use of Vocational Experts
  - Ash (E.D. Wis.)
    - Challenge to SSA's use of vocational expert evidence.
    - District court dismissed case as to all but two plaintiffs on March 28, 2016, and allowed plaintiffs to amend their complaint
    - Plaintiffs filed an amended complaint, and SSA's motion to dismiss is pending a court decision

# ALJ Bias

- Ahmed, Smith, Seibel (W.D. Wash)
  - Class actions: Allege bias by three ALJs in Seattle Hearing Office
  - Ahmed dismissed for failure to exhaust remedies
  - No class certified in other cases, but review of individual claims by court is pending

# Windfall Elimination Provision (WEP)

- Mitchael (E.D. Ark.)
  - Challenge to application of WEP to dual-service National Guard technicians in Eighth Circuit prior to Petersen decision and Acquiescence Ruling (AR) 12-1(8)
  - Court of Appeals for the Eighth Circuit affirmed decision to dismiss for lack of jurisdiction on January 13, 2016
- Crawford (M.D. Ala.); Martin (N.D. Ala.); Bauer (M.D. Fla.)
  - District court challenges to application of WEP to dual-service National Guard technicians
  - In Eleventh Circuit, so not covered by AR 12-1(8)
  - Decisions on motions to dismiss pending

# Windfall Elimination Provision (cont'd)

- Greenberg (D.D.C.)
  - Class action: challenge to application of WEP to recipients of pension from Israeli National Insurance Institute
  - SSA agreed that WEP should not apply and quickly settled case
  - SSA is currently implementing settlement, recalculating benefits retroactive to 2004
- Beeler (S.D. Ind.); Barnes (W.D. N.C.); Turnbull (D.D.C.)
  - Class actions: challenges to application of WEP to recipients of benefits under the Canadian Pension Plan (Beeler and Barnes) and pension plans of Canada, United Kingdom, Norway, Germany, and Greece (Turnbull)
  - Barnes was voluntarily dismissed on May 23, 2016. A motion to dismiss in Beeler is pending. Turnbull is only recently filed, so there has been no response by the agency to the complaint yet.

# Representative Sanctions

- Manbeck (S.D.N.Y.)
  - SSA sought to sanction Manbeck for refusing to do business electronically
  - Manbeck argued that ALJ appointment process is unconstitutional because Commissioner does not directly appoint ALJs
  - SSA withdrew proposed sanctions, and district court dismissed the case as moot
- Nassiri (S.D. Cal.)
  - Class action: challenge to alleged searches of Vietnamese immigrant claimants by armed SSA agents, supposedly to pressure claimants to recant testimony in prior rep. sanctions case against Manbeck
  - Partially dismissed, and class certification denied, but remains active. Renewed motion to dismiss pending

# Hearing Office Scheduling

- Johnson (S.D. Fla.)
  - Challenge to delay in scheduling hearings in Miami HO
  - Several plaintiffs have voluntarily withdrawn after having hearings scheduled
  - Motion to dismiss is pending

# Due Process

- Amin
  - Challenge by 11 plaintiffs to New York City field offices' failure to timely document reconsideration requests in SSI cessation cases and waiver requests in SSI overpayment cases
  - Plaintiffs allege they have unable to have benefits continued in full while appeals were pending
  - Government's motion to dismiss is pending

# Qui Tam Cases - Background

- Involve alleged fraud against Federal Government or its agencies
- Whistleblower sues in Federal district court
- Department of Justice decides whether to intervene in the case
- Whistleblower gets reward – percentage of the damages recovered and attorneys' fees



# General Law Litigation

# General Law Litigation

- All of our current significant General Law cases are discrimination complaints brought by SSA employees before the Equal Employment Opportunity Commission (EEOC).
  - one active
  - two pending
  - one where the settlement is being implemented.

# Significant Active General Law Litigation

- (b) (6) v. SSA
  - Complainants originally alleged that SSA discriminated against African-American men at Headquarters based on race and gender in promotions and awards decisions.
  - Successful agency motion practice narrowed the scope of alleged discrimination and reduced the agency's possible liability from more than \$8.5 million to \$2 million.
  - Pre-class certification fact and expert discovery has concluded.
  - The motion to certify the class is fully briefed and has been pending before the EEOC since July 2016.

# Significant Inactive General Law Litigation

- (b) (6) v. SSA
  - This is a breach of settlement action that arose from an earlier class action settled in 2002. This action alleged that the agency violated the settlement agreement.
  - The EEOC found in the class's favor on the breach allegation and remanded the case to an Administrative Judge to distribute compensation to each class member.

# Significant Inactive General Law Litigation (cont'd)

- (b) (6) v. SSA – cont'd.
  - In August 2014, the Department of Justice Office of Legal Counsel issued a legal opinion concluding that the EEOC did not have authority to order SSA to pay money damages for the alleged breach. Despite this opinion, the EEOC Administrative Judge has ordered the case to proceed.

# Significant Inactive General Law Litigation (cont'd)

- **(b) (6)** v. SSA
  - Complainants challenged SSA's promotions of African-American women in positions at the GS-5 through GS-13 grades at Headquarters between 2003 and 2013 as discriminatory based on race and gender.
  - After a hearing in 2008, the Administrative Judge ruled only those at the GS-11 to GS-12 levels were affected.
  - In 2014, both SSA and Complainants appealed the Administrative Judge's decision to the EEOC Office of Federal Operations in 2014, where both appeals are currently pending.

# Significant General Law Litigation Under Implementation

- **(b) (6)** v. SSA
  - Complainants challenged SSA's agency-wide promotions of employees with targeted disabilities (e.g., total deafness, blindness, missing extremities, paralysis, epilepsy, intellectual disability, psychiatric illness, dwarfism) from 2003 to 2014.
  - Complainants alleged that the agency discriminated against employees based on their disabilities in making selections for competitive promotions from best qualified lists.
  - We settled this class action in September 2014 and the EEOC Administrative Judge granted final approval of the settlement in March 2015. The settlement became effective August 16, 2015 after the appeals period lapsed.

# Significant General Law Litigation Under Implementation (cont'd)

- (b) (6) v. SSA – cont'd.
  - SSA distributed lump sum payment (i.e., class settlement funds, “holdback” funds for late claims, administrative expenses, attorneys’ fees, and incentive awards) to the class on August 31, 2015.
  - Approximately 700 current and former employees were deemed eligible to receive settlement payments and have received those payments.
  - The Office of Human Resources is implementing the programmatic requirements of the settlement including (including such things as an improved reasonable accommodation decision process).



# ORDP Challenges and Opportunities

(b) (5)

[Redacted]

[Redacted]

[Redacted]

[Redacted]

[Redacted]

[Redacted]

[Redacted]

(b) (5)

■

### *Promising Opportunities*

- (b) (5)
- **Significant improvement in representative payee monitoring.** Our Representative Payee Program allows an individual family member, friend or other third party to manage the benefits of a beneficiary, when we deem that beneficiary to be incapable of managing his own benefits. This has historically been a challenging aspect of our mission because we do not have sufficient funding to comprehensively monitor the performance of all representative payees. In 2016, we modernized our site review program and will use a skilled contractor to double the number of site reviews, while strategically focusing on the highest-risk representative payees.
- (b) (5)
- **National Disability Forum.** The National Disability Forum will provide the new administration with an early opportunity to interact with an array of external stakeholders. This inclusive and collaborative approach helps us develop responsive, effective, and efficient policies in order to empower individuals with a disability, minimize their financial hardship, and ensure proper use of Disability Trust funds.

### *Key Partners*

- Advocate community;
- Researchers/consortia;
- OMB

Last Update 11/30/16

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- GAO
- SSAB
- Congress (we provide testimony and answer requests for data on a range of policy and research issues)
- Other federal agencies (we lead numerous agency workgroups involving more than 40 agencies)

# The Office of Disability Adjudication and Review



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December 14, 2016

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# Discussion Points

- **General Information about the Disability Process**
  - **The Disability Process**
  - **Key Metrics**
- **Telework Issues in ODAR**
  - **Administrative Law Judge and Decision-Writer Metrics**
- **ALJ Discipline**
- **Policy Issues and Options**

# The Disability Process



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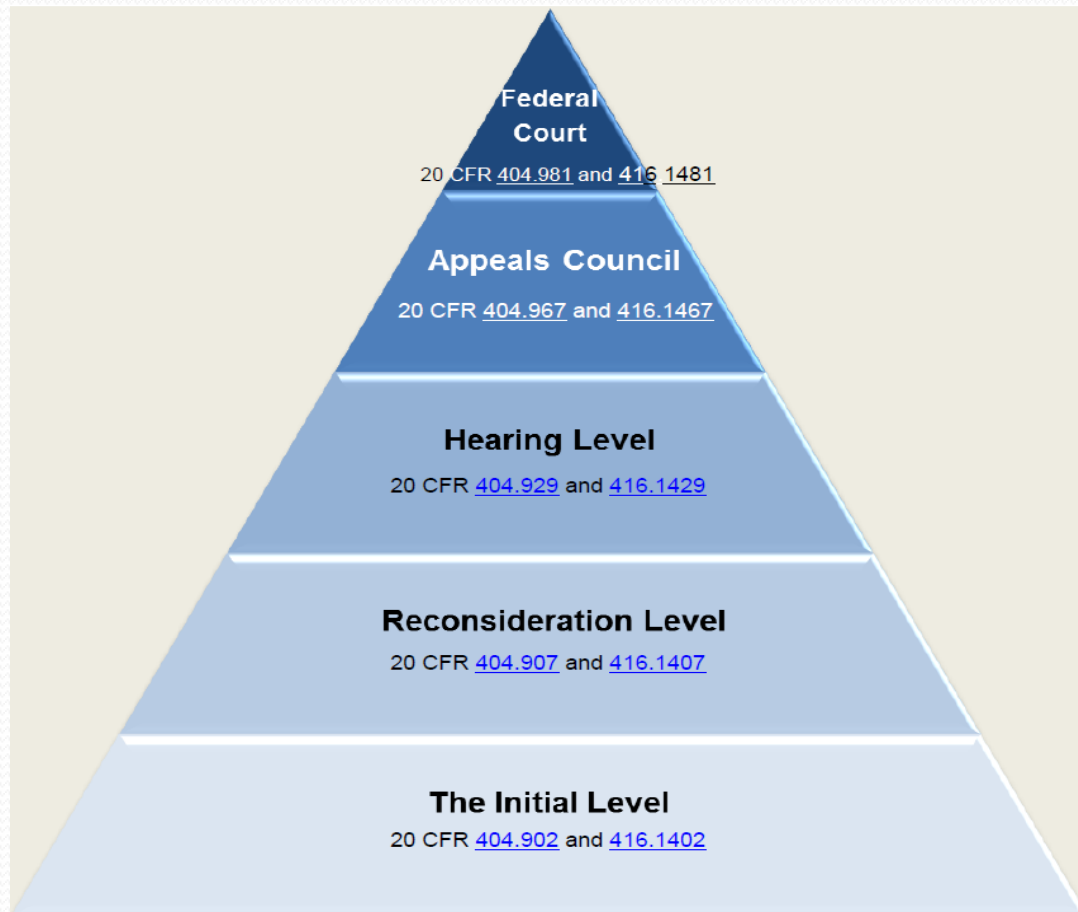
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# A Brief Overview of the Disability Process

- Disability is the gateway to retirement from the workforce for many unfortunate people
- There are up to four levels of administrative review. Claims are typically filed in local field offices or online
- Disability claims are considered at the initial and reconsideration stages by 54 State agencies known as the Disability Determination Services (DDS)
- Hearings and appeals are handled by federal employees in SSA's Office of Disability Adjudication and Review

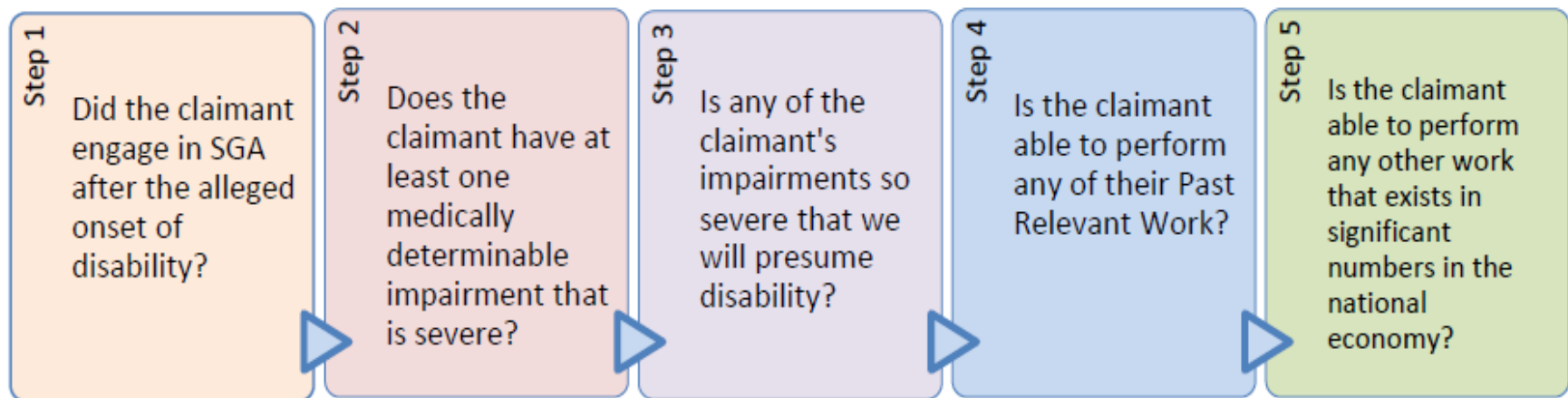
# Levels of Administrative Review and Describing Regulations





## What are the five steps?

The initial adult sequential evaluation is composed of five steps which must be considered in sequence, but the process is stopped at any step at which a finding of disabled or not disabled can be made (20 CFR 404.1520(a) through (g) and 416.920(a) through (g)).



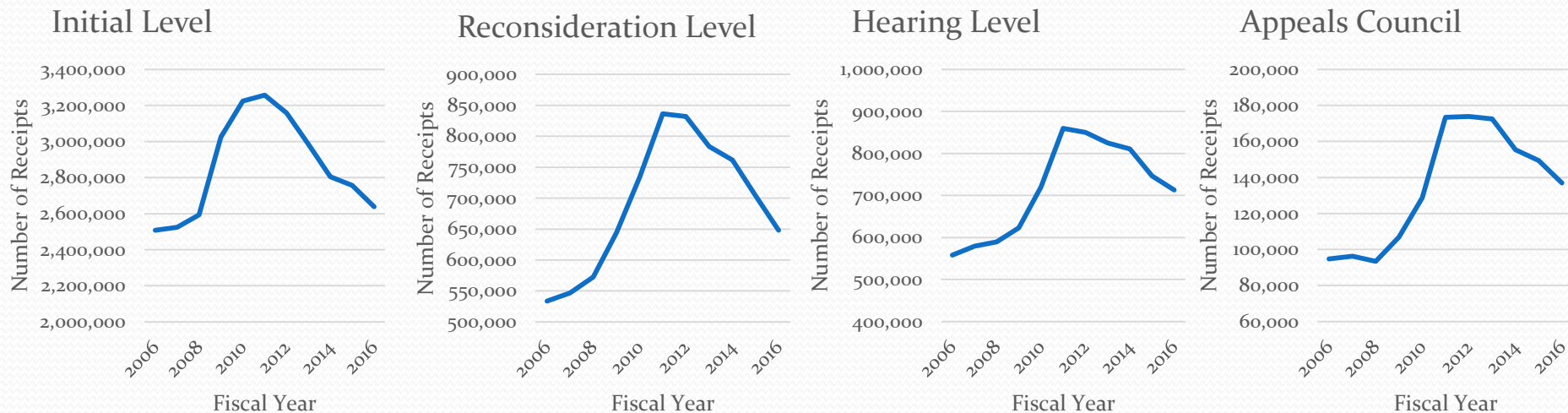
# Key Metrics



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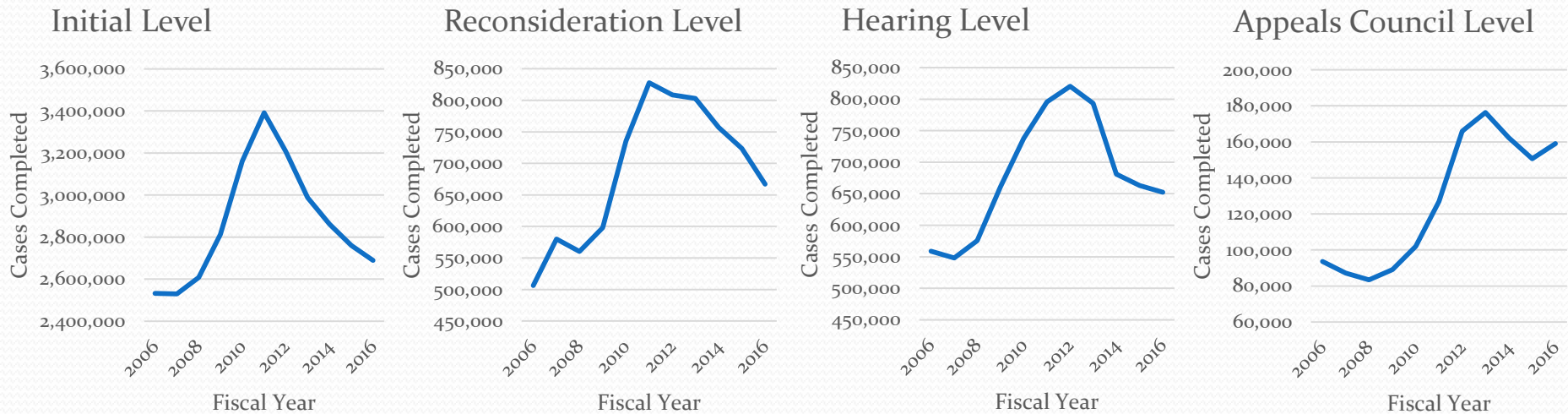
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# Number of Receipts by Level of Adjudication from FY2006 to FY2016



		Fiscal Year										
		2006	2007	2008	2009	2010	2011	2012	2013	2014	2015	2016
Level of Adjudication	Initial	2,507,958	2,524,211	2,592,863	3,024,418	3,224,668	3,257,461	3,158,421	2,984,985	2,805,067	2,756,319	2,637,755
	Reconsideration	533,421	546,705	572,631	643,916	734,138	836,406	832,090	783,615	761,722	704,341	647,910
	Hearing	557,970	579,127	589,449	622,851	720,161	859,514	849,869	824,989	810,715	746,300	712,853
	Appeals Council	94,755	96,260	93,423	106,965	128,689	173,332	173,849	172,492	155,352	149,437	136,987

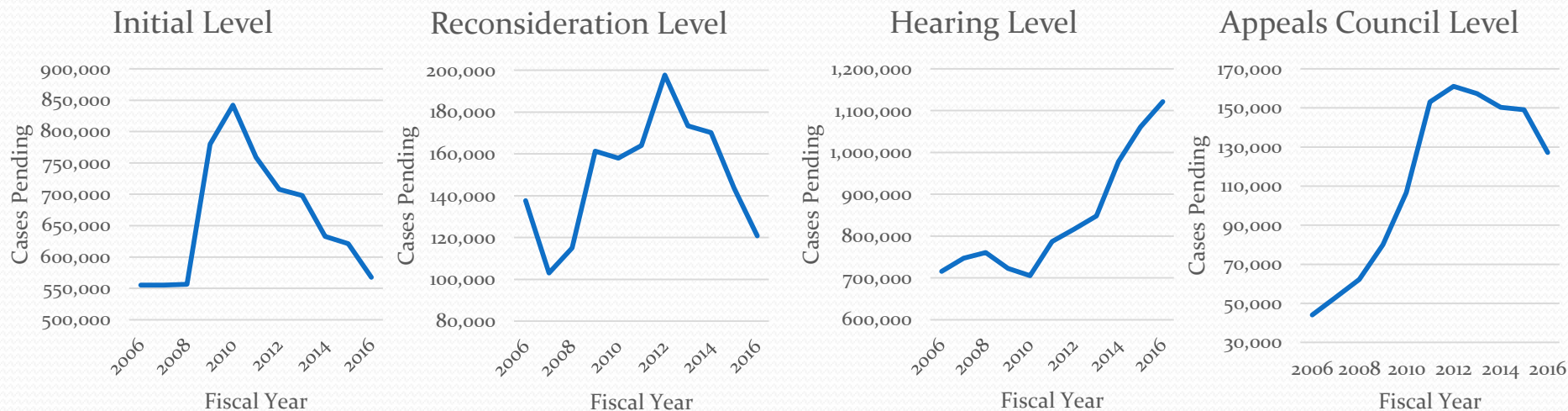
# Number of Cases Completed by Level of Adjudication from FY2006 to FY2016



		Fiscal Year										
		2006	2007	2008	2009	2010	2011	2012	2013	2014	2015	2016
Level of Adjudication	Initial	2,532,264	2,529,721	2,607,282	2,812,918	3,161,314	3,390,936	3,206,869	2,987,883	2,861,895	2,759,432	2,688,977
	Reconsideration	506,446	580,163	560,365	598,098	735,067	828,010	808,521	803,194	757,198	723,485	666,948
	Hearing	558,978	547,951	575,380	660,842	737,616	795,424	820,484	793,580	680,963	663,129	652,241
	Appeals Council	93,538	87,129	83,407	89,066	102,062	126,992	166,020	176,251	162,280	150,673	159,000

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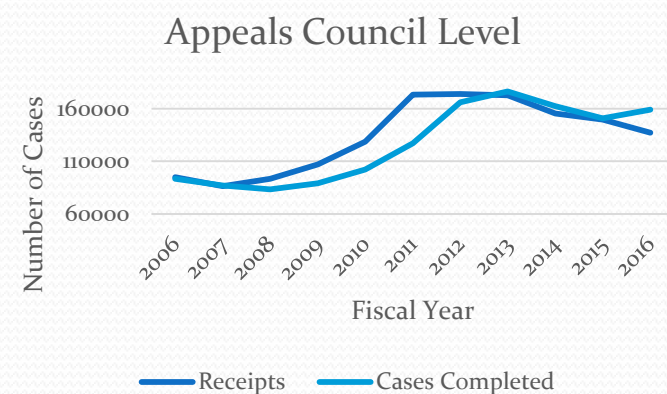
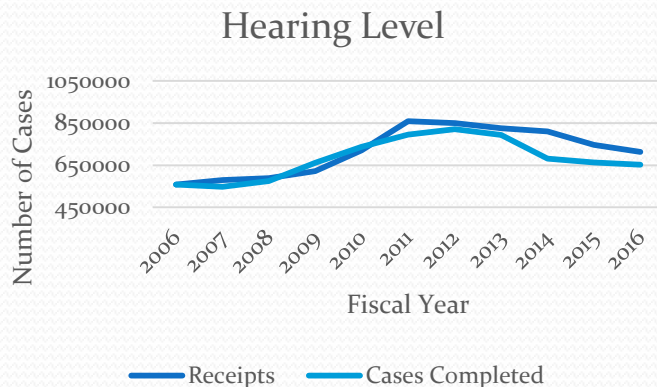
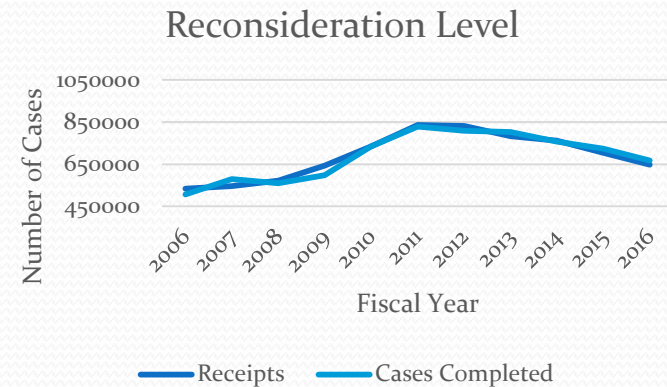
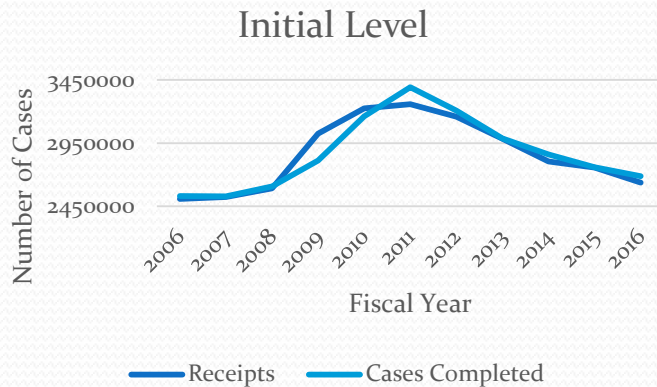
# Number of Cases Pending by Level of Adjudication from FY2006 to FY2016



		Fiscal Year										
		2006	2007	2008	2009	2010	2011	2012	2013	2014	2015	2016
Level of Adjudication	Initial	555,071	555,317	556,670	779,854	842,192	759,023	707,700	698,127	632,656	621,315	567,644
	Reconsideration	137,626	102,990	115,059	161,264	157,977	164,049	197,788	173,472	170,255	143,540	120,829
	Hearing	715,568	746,744	760,813	722,822	705,367	787,190	816,575	847,984	977,736	1,060,907	1,121,519
	Appeals Council	44,032	53,163	62,210	80,143	106,664	153,004	161,070	157,311	150,383	149,147	127,134

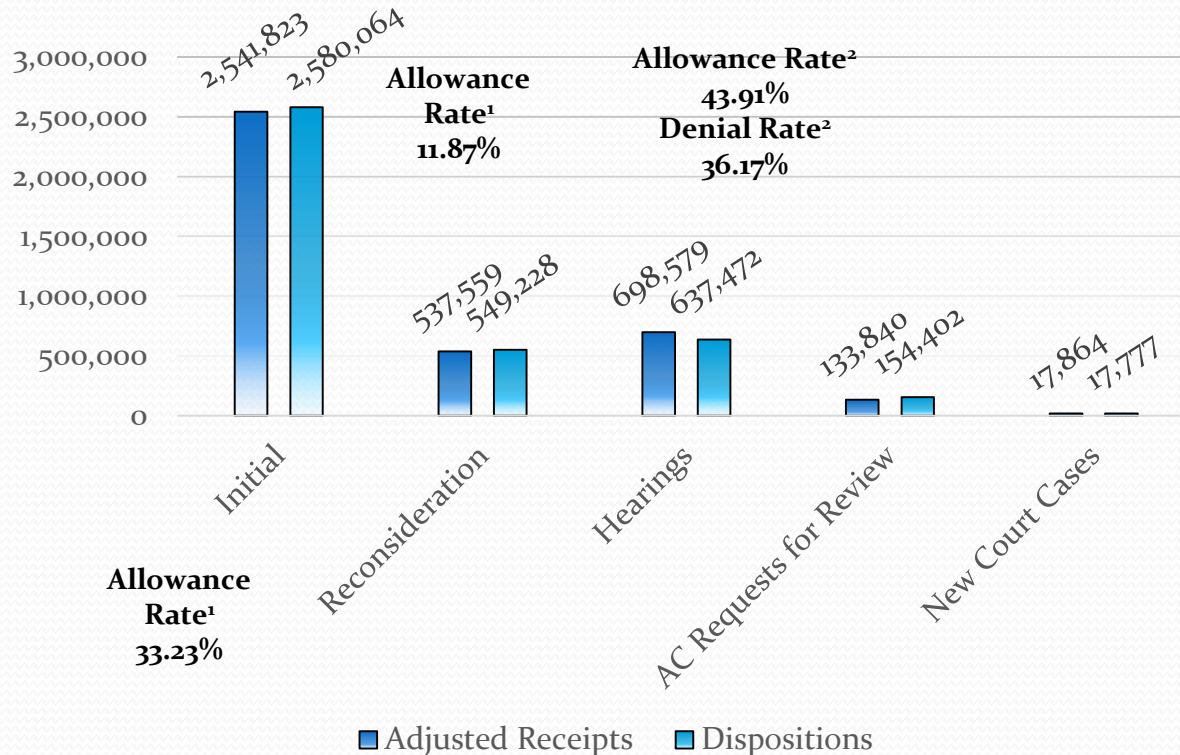
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# Relationship Between the Number of Receipts and the Number of Cases Completed Between FY2006 and FY2016



# Comparative Data FY 2016

## FISCAL YEAR 2016 INITIAL FILINGS & APPEALS



<sup>1</sup> Rates based on decisions

<sup>2</sup> Rates based on dispositions

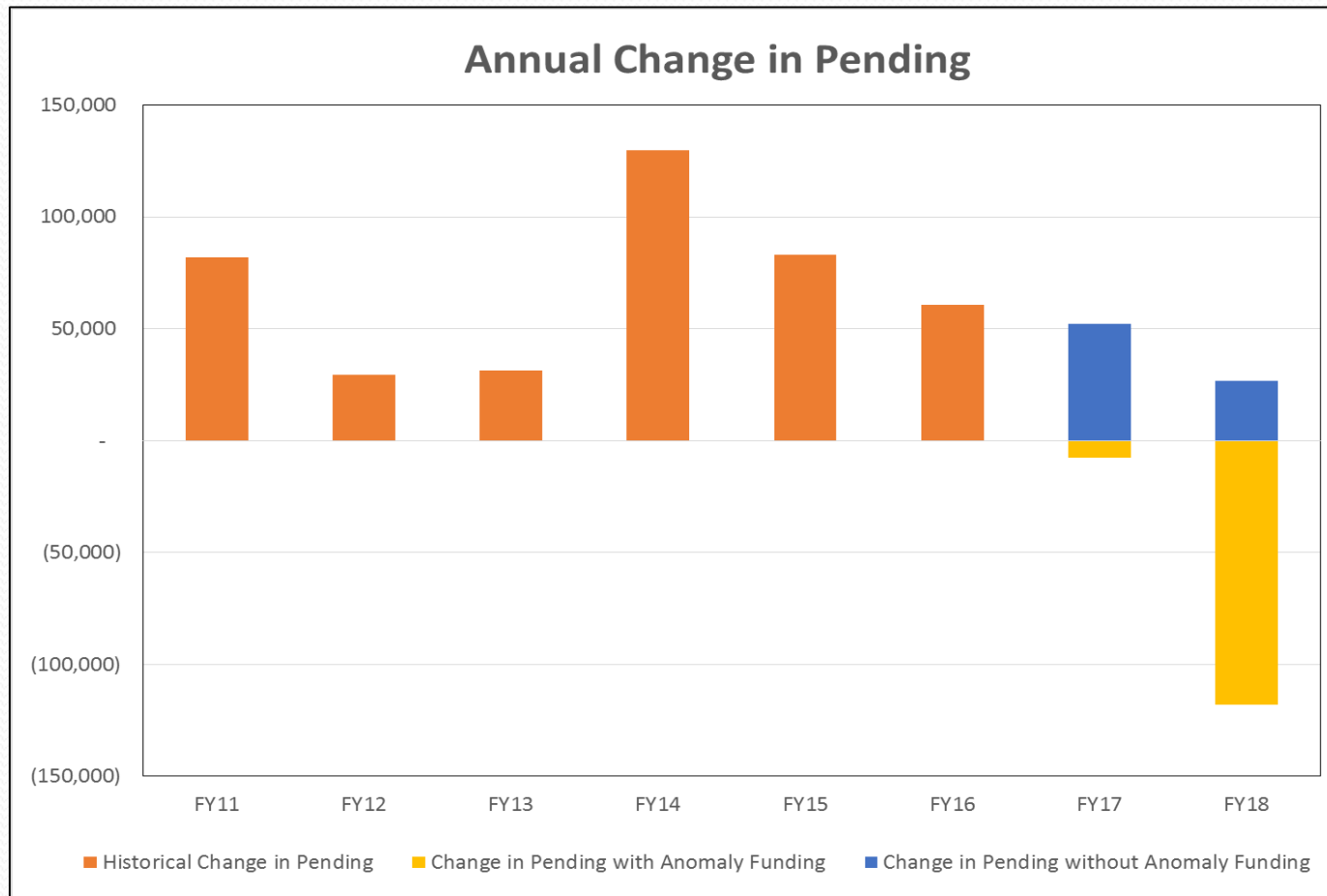
Note: Data do not include 53<sup>rd</sup> week.

Source: ANS/MIA Court Case Data only; Data Sources for other levels are previously mentioned.

Prepared by: ODAR/OESSI/DMIA on October 17, 2016

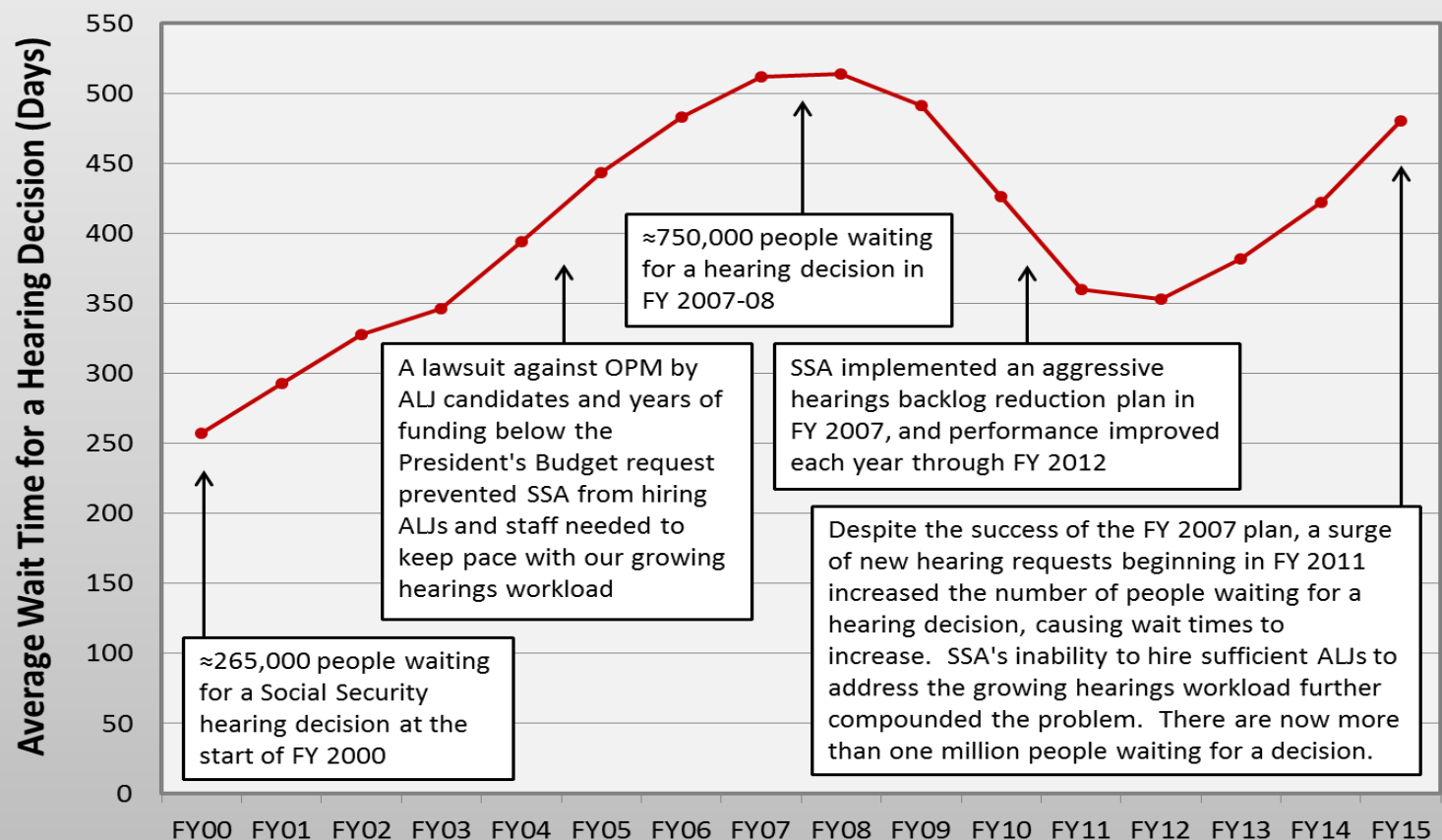
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# Change in Pending FY 11-FY18



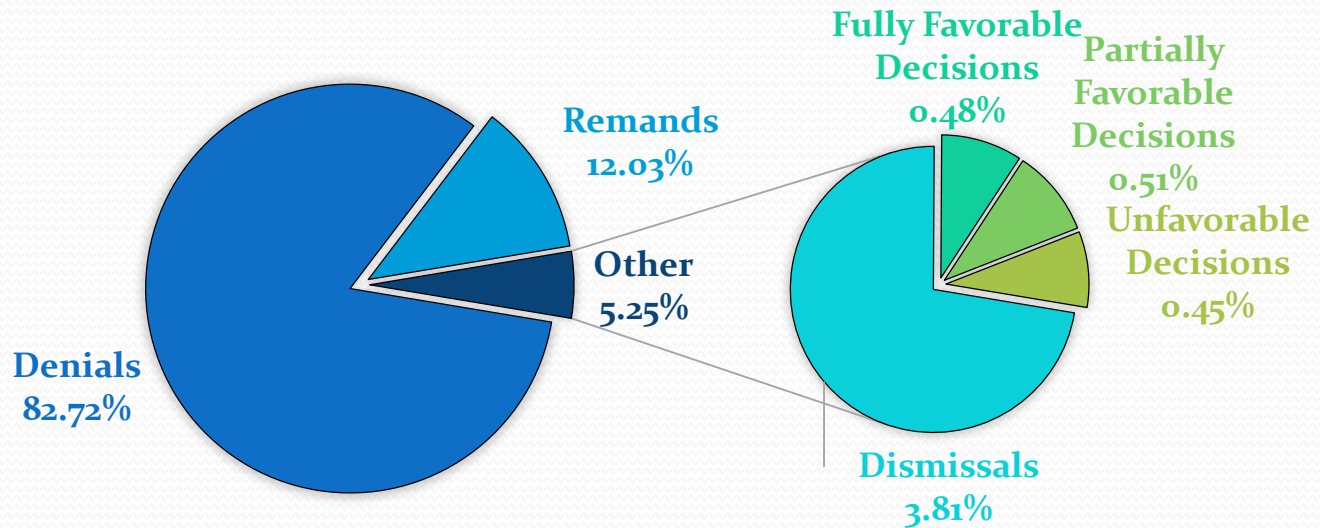


## History of Pending Claims and Wait Times



# FY16 Requests for Review

## FY16 REQUEST FOR REVIEW DISPOSITIONS



Source: ARPS MI – Appeals Council  
Note: Data do not include 53<sup>rd</sup> week.  
Prepared by: ODAR/OESSI/DMIA on October 17, 2016

## CHANGING DISPOSITION AND APPEALS RATES

FY 2010 – FY 2016

	2010	2011	2012	2013	2014	2015	2016 *
Favorable ALJ, SAA Decisions as % of All Dispositions	61.13%	60.70%	56.25%	50.06%	46.99%	43.70%	43.91%
Appeals to AC as % of Appealable Cases	39.48%	45.17%	38.85%	37.59%	37.36%	36.42%	33.73%
AC Remands as % of All AC Dispositions	21.77%	21.19%	18.62%	17.11%	14.34%	13.58%	12.03%
New Court Cases Processed at AC as % of Appealable AC Dispositions	16.23%	15.07%	12.99%	13.67%	14.04%	14.88%	13.71%
Federal Court Remands as % of Court Dispositions	46.90%	46.12%	44.80%	42.35%	42.57%	45.36%	NA

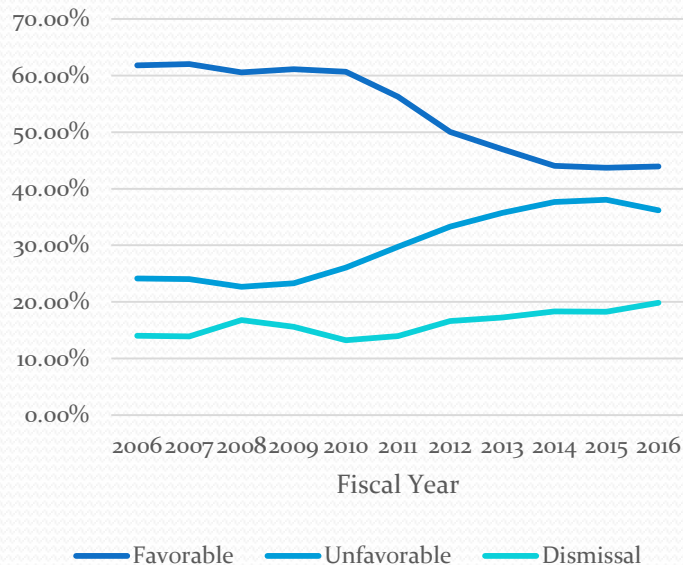
\* = FY 2016 numbers below represent 53 data weeks

# Hearing Office Dispositions

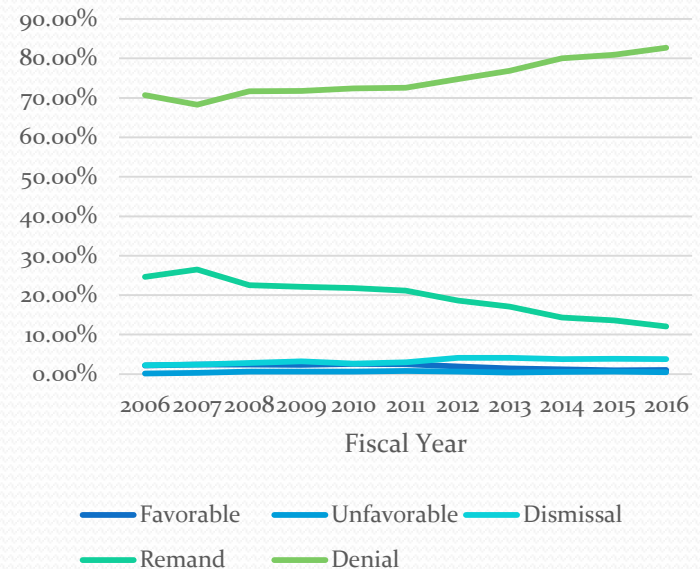
Fiscal Year (FY)	Total Dispositions	Dismissed	% Dismissals of Total Dispositions
FY 2007	547,951	76,189	13.9%
FY 2008	575,380	96,529	16.8%
FY 2009	660,842	103,071	15.60%
FY 2010	737,616	97,574	13.23%
FY 2011	793,563	111,015	13.99%
FY 2012	820,484	136,252	16.61%
FY 2013	793,580	136,890	17.25%
FY 2014	680,963	124,616	18.30%
FY 2015	663,129	121,078	18.26%
FY 2016	637,472	126,949	19.91%

# Case Disposition Breakdown at the Hearing Level and Appeals Council from FY2006 through FY2016

## Case Dispositions at the Hearing Level

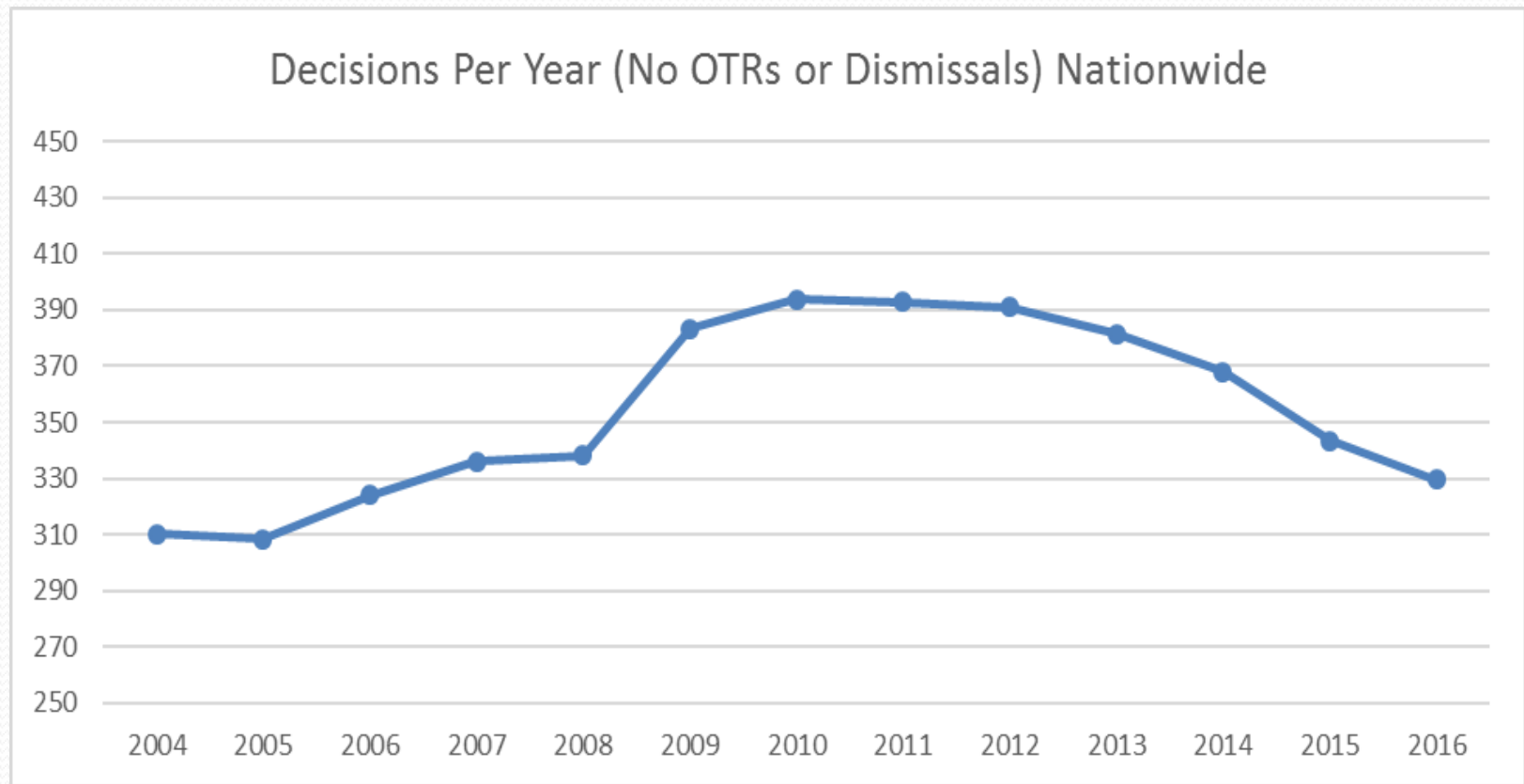


## Case Dispositions at the Appeals Council

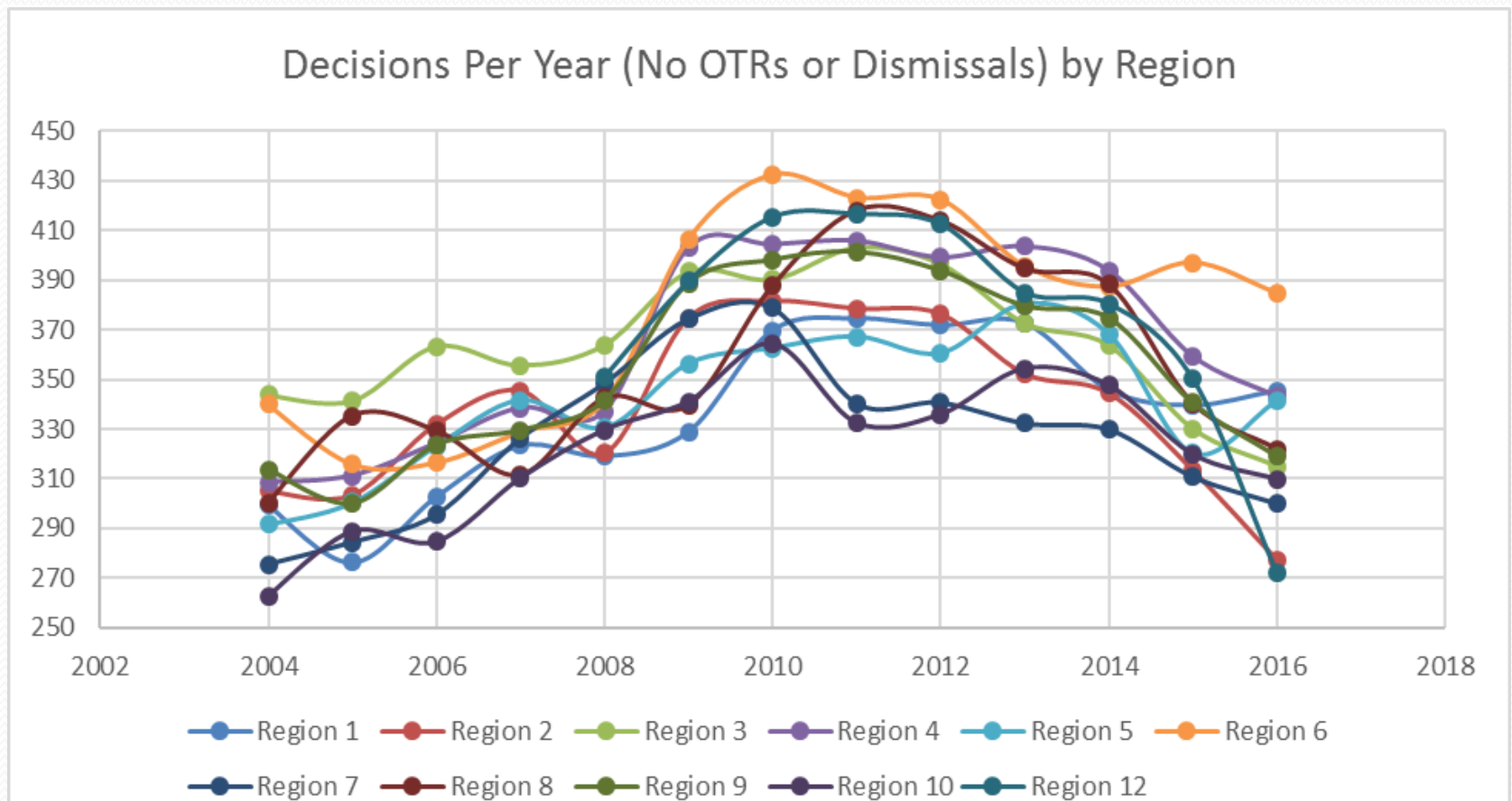


Note: Favorable decisions include both partially and fully favorable decisions.

# Administrative Law Judge Performance

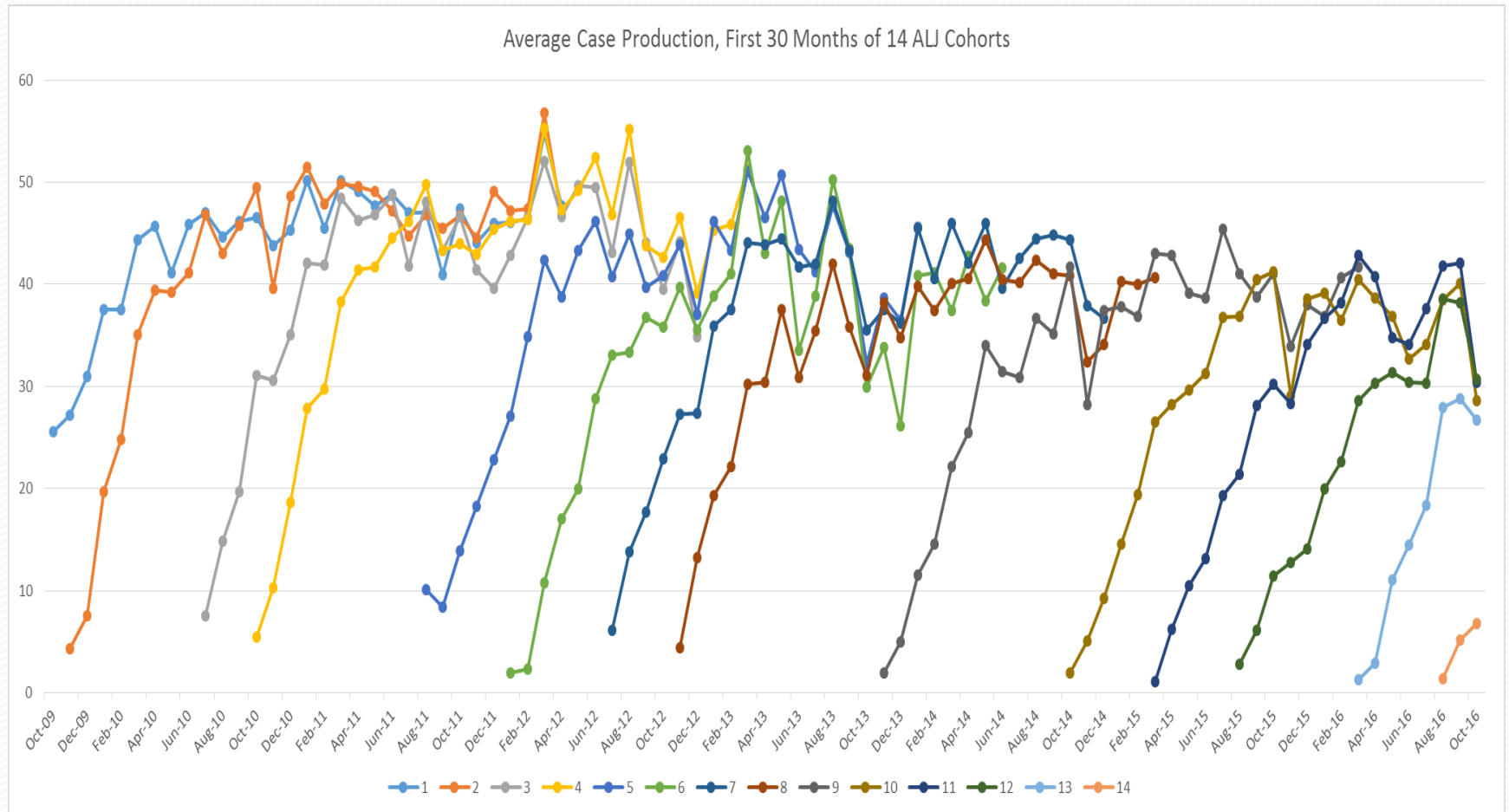


# Regional Average ALJ Decisions Per Year



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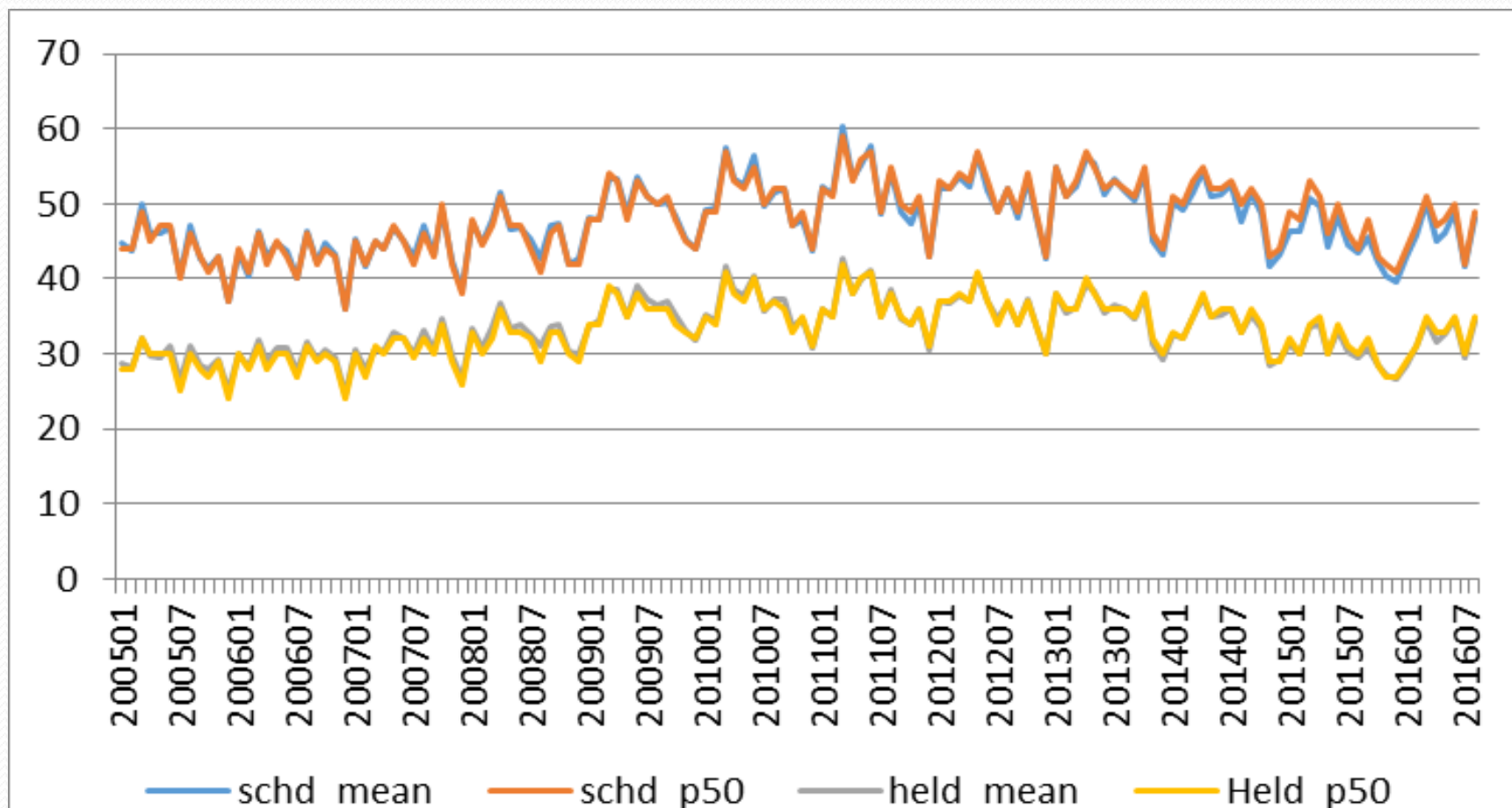
# Dispositions by ALJ Training Cohort



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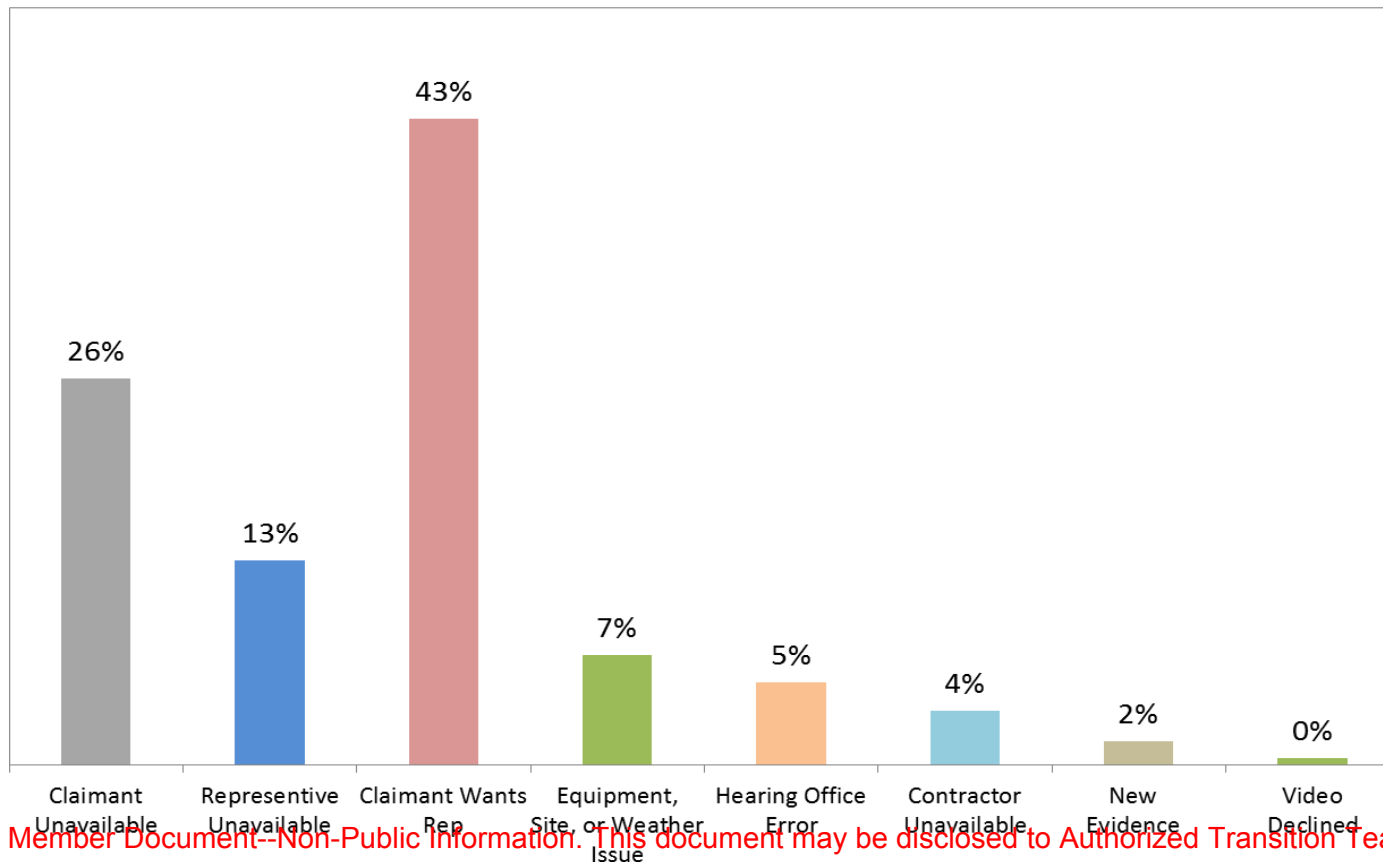
# Mean Scheduled to Held Hearings



# Postponements

## Hearing Postponements, by Reason FY17 (YTD)

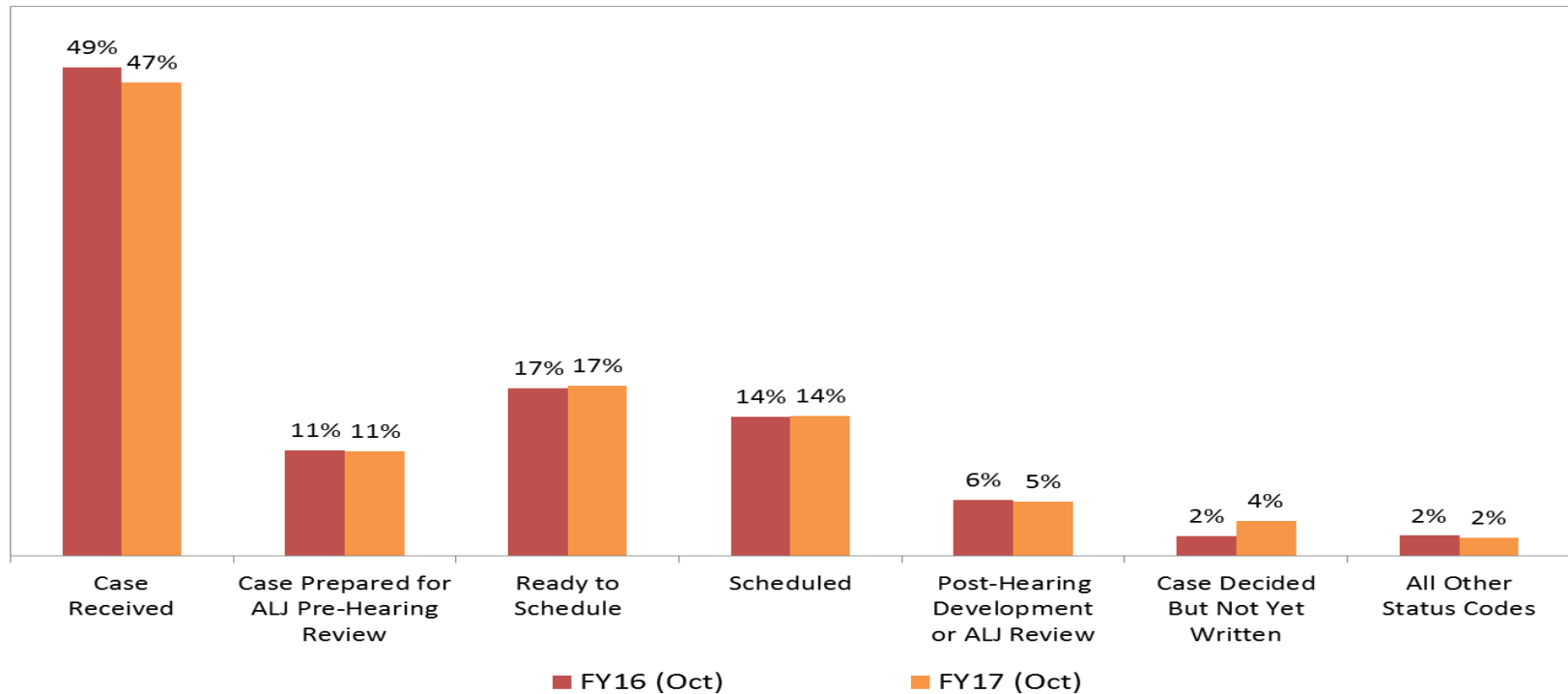
*Percentages may not add up to 100% due to rounding*



# Current Case Status

## Current Case Status of All Pending Hearings FY16 vs. FY17

*Percentages may not add up to 100% due to rounding*



# Telework in ODAR



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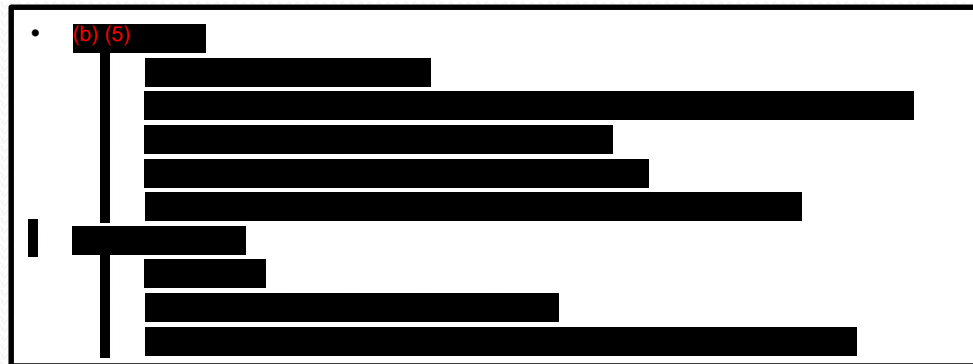
# Telework in AFGE

## HISTORY

- Originally called Flexiplace as part of 2000 ODAR-AFGE MOU
- 2012 AFGE CBA added new Article 41 – Telework
- Article 41 Sidebar required component MOU, completed June 4, 2015, expanded telework to Legal Assistants through VPN

## CURRENT

- AFGE eligible teleworkers may telework 1-3 days per week
- Awaiting rollout of Softphones to enable telephonic workloads such as hearing scheduling



# Telework in NTEU

## HISTORY

- Originally called Flexiplace as part of 1996 ODAR-NEU Flexiplace agreement
- 2014 ODAR-NTEU CBA revised to Article 17-Telework
- NTEU re-opened Article 17 in 2016. The parties went to impasse and ODAR was compelled by FSIP to propose a 4<sup>th</sup> day of telework pilot for NTEU decision writers

## CURRENT

- (b) (5) [REDACTED]
- [REDACTED]
- [REDACTED]
- [REDACTED]

- (b) (5) [REDACTED]

[REDACTED]

[REDACTED]

[REDACTED]

[REDACTED]

[REDACTED]

[REDACTED]

[REDACTED]

[REDACTED]

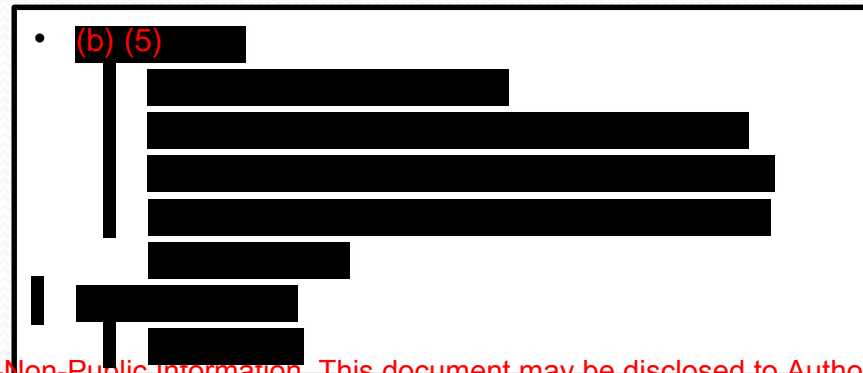
# Telework in IFPTE

## HISTORY

- Originally called Flexiplace in 2000 ODAR-IFPTE CBA
- 2013 CBA revised to Telework
- Limited to 8 days per month but additional days can be approved by HOCALJ

## CURRENT

- HOCALJs originally limited telework to 8 days but 2016 arbitration decision required local decisions
- HOCALJs have approved additional days but typically limited to 2 additional days per month (10 total)
- ALJs must schedule a reasonably attainable number of cases



# Teleworking ALJs

Region	ALJs	Teleworking ALJs	Non-teleworking ALJs	Average days per pay period per ALJ	ALJs recalled to cover hearings	ALJs denied telework for scheduling
1	61	39	22	4	0	0
2	138	71	67	4	0	0
3	173	96	77	4	0	1
4	425	251	174	4	0	1
5	257	122	125	4	0	6
6	177	99	78	4	0	0
7	79	35	44	2	0	1
8	50	26	34	4	0	0
9	178	109	69	4	0	1
10	59	34	25	4	0	3
NHC	58	48	10	2	0	0
Total	1655	930	725	4	0	12



# CURRENT TELEWORK STATISTICS

ODAR Employees participating in scheduled telework:

- Total: 7,336
  - 841 ALJs
  - 6,495 Non-ALJs
- Managers are currently allowed to telework up to 2 days per week.

# Management Rights When Suspending Telework or Calling Employees Back

- AFGE – Contract provides recall of employees on a telework day for specific in-office work need or IT issues. Telework may be suspended for in-office work or training. Telework can be terminated for 1-year for poor performance, diminished performance or not meeting eligibility factors.
- NTEU – Employees may be recalled under the same conditions as AFGE employees. Telework may be suspended for in-office work or training. Telework can be terminated for 6 months for poor performance, diminished performance or not meeting eligibility factors.
- IFPTE – ALJ telework may be suspended if the ALJ does not schedule a reasonably attainable number of cases, or has overdue cases in controlled statuses. Telework can be terminated for 1-year due to disciplinary actions.

# Administrative Law Judge and Decision-Writer Metrics



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# Capturing Business Process Data

We documented our business process in guides and flow charts:

- Identifying all important tasks and who performs them
- Charting how work moves from one step in the process to the next
- Creating status codes for each step in the process
- Identifying outputs at every step in the process

# Setting Performance Expectations

- We captured data about each work output and the time spent performing the work enabling us to calculate how long each task takes, as well as the number of people needed to do each task
- We set performance expectations based on the time needed to perform the tasks
- We set parameters that helped us derive the time values
- We disambiguated the time values for different categories of work using an iterative process that ensured that all values fell within the established parameters

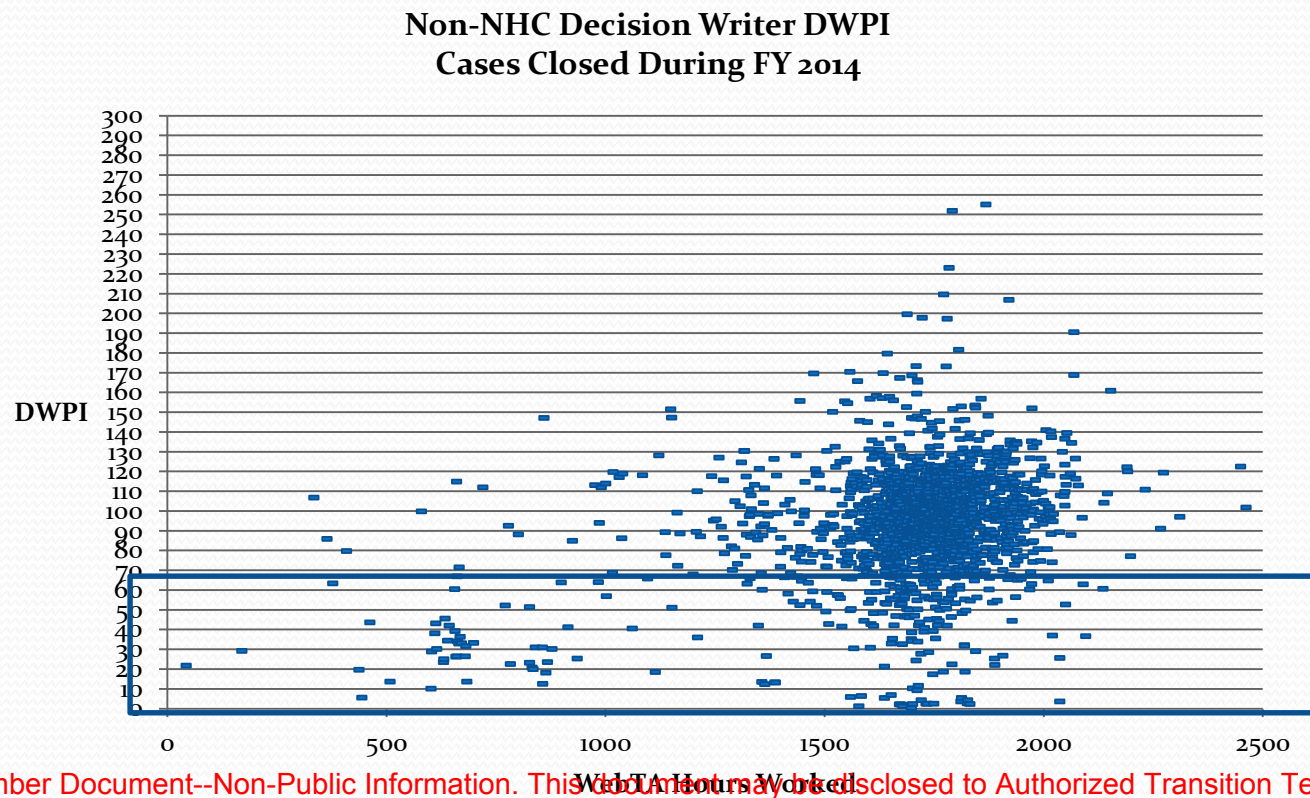
# Case Crediting Based on Work Complexity

## Scale of Weighted Actions

Each type of case was assigned a time value, representing the average time needed to process the average case of that type as follows:

• Fully Favorable Decision – Step 3 or Other	3.03
• SGA Unfavorable Decision	3.17
• Non-Severe Unfavorable Decision	3.78
• Fully Favorable Decision – Step 5	3.94
• Fully Favorable Decision - CDR	9.76
• Unfavorable Decision - Other	10.50
• Unfavorable Decision - CDR	10.63
• Non-Disability Fully Favorable Decision	10.85
• Non-Disability Unfavorable Decision	11.18
• Non-Disability Partially Favorable Decision	11.39
• Partially Favorable	12.00
• Unfavorable Decision – DA&A	14.63

# Numeric Based Performance Standards Should Drive ODAR Decision Writer Productivity Higher



# Calculating Quarterly Goals – Branch Inputs

We obtain information from our branch chiefs to calculate quarterly goals. Specifically, we:

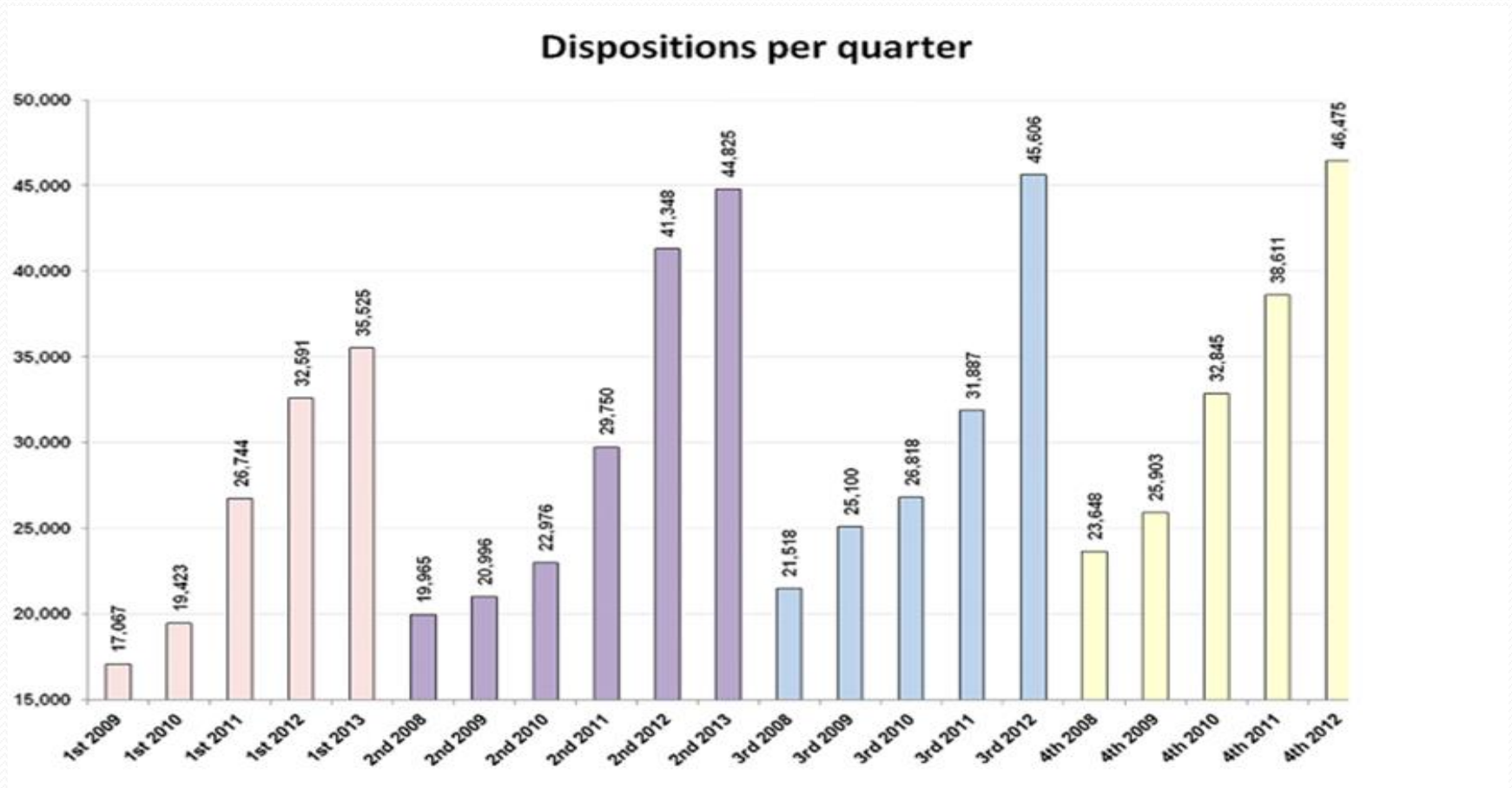
- Categorize staff by leave category
- Include training curves and mentoring
- Exclude leave earned, holidays, meeting time, approved time for EEO counselors and union officials, and employees on details
- Provide a discount for employees on performance assistance plans
- We then derive monthly goals for each branch



# Divisional Productivity Goals

Branch <small>(goals are shown in whole dispositions)</small>	1st Quarter staff available <small>In persons</small>	1st Quarter unadjusted performance goal <small>In dispositions</small>	1st month monthly goal <small>24 / 61</small>	2nd month monthly goal <small>18 / 61</small>	3rd month monthly goal <small>19 / 61</small>	Simple Weekly Divide <small>Divide quarterly goal evenly by 12 weeks as usual for any quarter.</small>	Sum of monthly goals
Div 1							
1	7.156	633	276	191	166	49	633
2	9.569	846	369	255	222	65	846
3	9.428	821	359	247	215	63	821
4	9.428	832	363	251	219	64	832
5	10.928	959	419	289	251	74	959
6	9.582	847	369	255	223	65	847
Div 1 total	56.090	4,938	2,155	1,487	1,296	380	4,938
Div 2							
7	9.883	889	386	268	235	68	889
9	10.133	908	394	274	239	70	908
10	13.981	1,225	535	369	321	94	1,225
RSI/SSI-1	14.438	152	66	46	40	12	152
Div 2 total	48.435	3,173	1,382	957	835	244	3,173

# Results – Increased Dispositions




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# ALJ Discipline



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- 
- Most ALJs are hardworking, dedicated public servants.
  - Nonetheless, the ALJ construct is complex -
    - ALJs are difficult to hire
    - ALJs may not be performance managed in any traditional sense
    - ALJS are extremely difficult to suspend or remove

- Reprimand - RCALJ has delegated authority
- Suspension – Associate CALJ and above has delegated authority to file charges with MSPB. Only MSPB has authority to suspend.
- Removal – CALJ and above have delegated authority to file charges with MSPB. Only MSPB has authority to remove.

- Even when ALJ conduct or performance is so egregious that the agency must refrain from allowing the ALJ to continue to hear and decide cases, immediate removal or immediate suspension or removal from federal service is not possible
- Unlike with any other employee, SSA typically places the ALJ on administrative leave for lengthy periods of time at a grievous cost in terms of
  - Continued payment of salary and benefits
  - Management and attorney personnel required to handle the years long discipline process
- It can take 2 - 3 years, sometimes more, to suspend or remove an ALJ as the action winds through the MSPB process

- From 2013 to current, SSA formally disciplined more than 60 ALJs
- Since Terrie and Donna took office :
  - 3 removals completed
  - 3 removals pending before the MSPB
    - (another will be signed this week if not settled)
    - Several others are in development and we expect these to move more quickly than past removals building on past success
  - 2 suspensions
  - 16 reprimands

- In addition, we have sent 100s of directives and cure letters to ALJs regarding serious delinquency of their duties, some of which have led to telework restrictions or other discipline
  - We have increased our use of directives in the last several years
  - Nearly 140 judges have been sent at least one seriously delinquent letter
  - 8 ALJs have had telework suspended as a result



- Of the 4 ALJs that are currently on administrative leave pending the ultimate outcome of their removal complaints
  - One has been on administrative leave since 12/18/13 (current dollar amount close to \$500,000)
  - One has been on administrative leave since 5/12/14 (current dollar amount over \$400,000)
  - One has been on administrative leave since 10/2/15 (current dollar amount over \$200,000)
  - One has been on administrative leave since 12/14/16 (removal charge will be filed this week if not settled)

# ALJ Administrative Leave

- From 2013-2015, SSA paid nearly \$2.3 million in salary to ALJs on administrative leave who had engaged in egregious conduct or extreme poor performance.

FY	Total hours administrative leave granted	Total cost of administrative leave
FY13-FY15	30,044.50	\$2,283,718.78

# Policy Issues and Options



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# Data Analysis and Policy Development

- Sometimes training alone cannot resolve the core underlying issues related to why cases are remanded
- We have seen that various courts interpret some of our policies in different ways, raising the potential need for clarification of those policies
- Arraying data showing reasons for remand by adjudicator or district court in heat maps helps identify both outlier behaviors as well as issues more related to policy construction than training

# Procedural and Policy Change

- Our current practice is to mobilize and analyze data about a problem, determine if we can address it with training, and then, as necessary, progress through changes in sub-regulatory guidance, before moving on to regulatory or legislative proposals
- We publish changes to HALLEX and POMS, the operational instructions for disability adjudicators, on an almost daily basis
- Multiple Social Security Rulings are published annually
- Regulatory changes and legislative proposals are pursued as necessary

# Opportunities for Change

- Business Process
  - *NLP, PHC Expansion, new HO business model*
- Management
  - *Service delivery goals set at unit/office/regional/national levels*
  - *Greater management authorities*
- Sub Regulatory Policy Change
- Regulatory Proposals
  - *Final—National Uniformity (expansion of Boston rules nationwide)*
  - *Pending Regulations*
    - *Medical Evidence*
    - *Representative Conduct*
- Legislative Proposals

# Program Improvement Ideas

- Application Rate
- State Agency Decision-making
- Hearing Level Processing
- AC and Federal Court Review
- Substantive Policy and Data Capture
- Structural Improvements
- Program Integrity

# The Office of Disability Adjudication and Review



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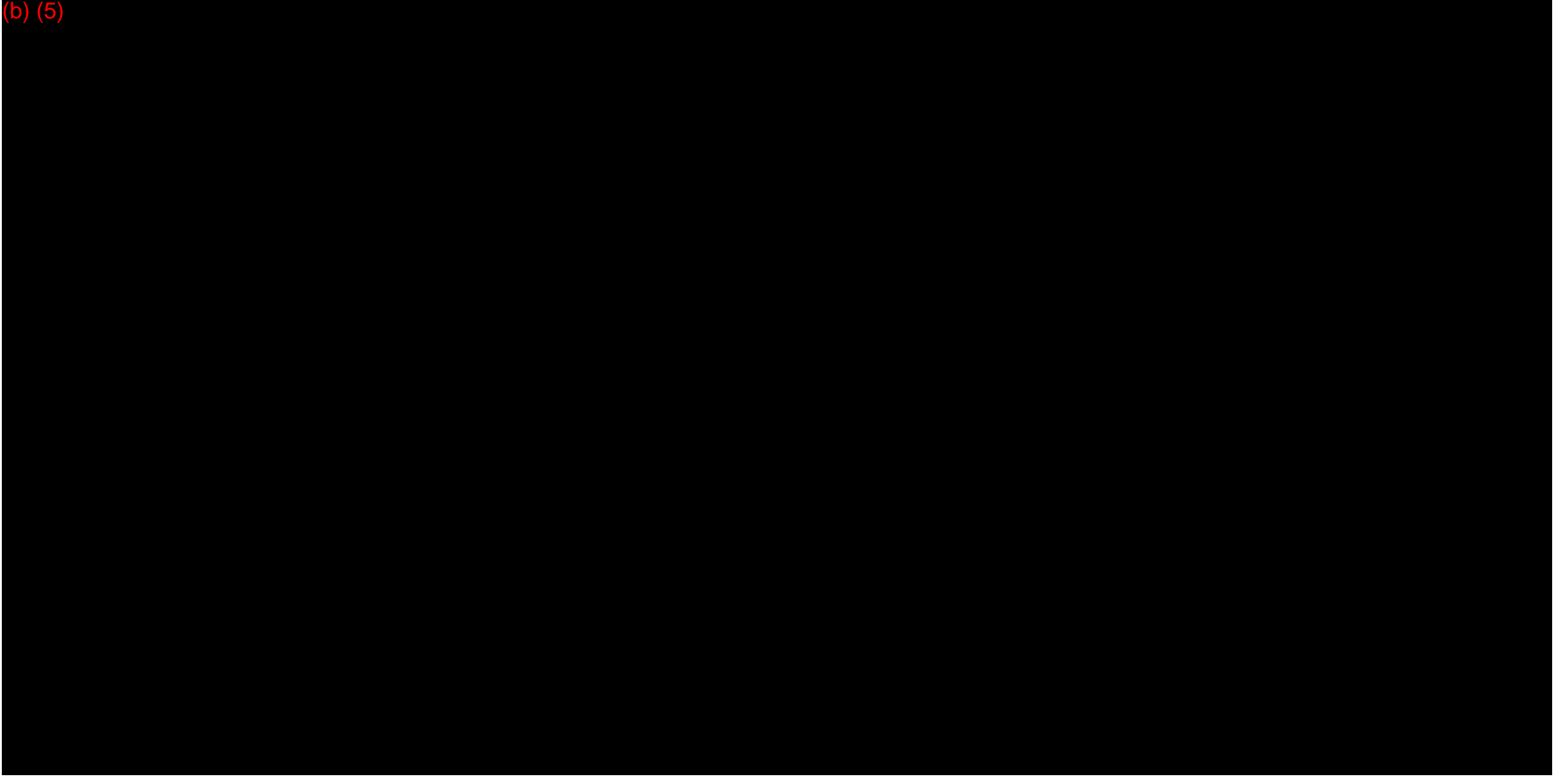
December 14, 2016



(b) (5)

## ODAR Hearings Backlog Proposed Scenario <sup>1/</sup>

(b) (5)



### **New CR Provision**

SEC. 172. The fifth proviso under the heading 'Social Security Administration—Limitation on Administrative Expenses' in division H of Public Law 114–113 shall be applied during the period covered by this Act by substituting 'shall be used for activities to address the hearing backlog within the Office of Disability Adjudication and Review' for 'shall be for necessary expenses for the renovation and modernization of the Arthur J. Altmeyer Building'.

The above new CR provision refers to the language below from SSA's FY 2016 appropriation:

### **FY 2016 Altmeyer Provision**

*Provided further*, That, (b) (5), to remain available until expended, shall be for necessary expenses for the renovation and modernization of the Arthur J. Altmeyer Building:

Tom and David:

- A one-page document describing the status of our three collective bargaining agreements. As we noted during our briefing and in the document, SSA’s Office of Labor-Management and Employee Relations is the agency lead on collective bargaining agreements. (non-public document)
- Data relative to ALJ productivity (non-public documents):
  1. A chart reflecting Hearing Receipts and Dispositions (FY04-16)
  2. A chart reflecting Hearings Dispositions Per Day Per Available ALJ (FY04-16)
  3. (b) (5) [REDACTED]

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We look forward to working with you and the opportunity to discuss these documents at your convenience. We will continue to forward promised documents as we develop and/or clear them. Please let us know if you have any questions or would like to discuss more fully.

Terrie Gruber  
Deputy Commissioner, Office of Disability Adjudication and Review

Donna L. Calvert  
Assistant Deputy Commissioner, Office of Disability Adjudication and Review

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## ODAR Bargaining Unit Contract Updates

Please note: The Office of Labor Management and Employee Relations (OLMER) is the lead on term bargaining and may have more detailed information.

### **IFPTE CBA:**

Covers non-management Administrative Law Judges (ALJ). Currently 1456 bargaining unit ALJs.

- Last negotiated September 30, 2013. Final settlement of CBA with IFPTE was signed October 14, 2015. Ratification was completed on December 18, 2015.
- CBA will expire on September 30, 2017.

### **NTEU CBA:**

Covers Attorney Advisers (Decision Writers) nationwide (except for hearing offices in the Atlanta Region), and Legal Assistants and Paralegals in the Denver Region. Currently 1717 total employees in the NTEU bargaining unit.

- Last negotiated June 2, 2014.
- NTEU had re-opener provision, which they utilized for Article 17 – Telework. Resulted in a September 2016 decision from Federal Service Impasses Panel providing a pilot program for a 4<sup>th</sup> day of telework.
- CBA will expire June 2018.

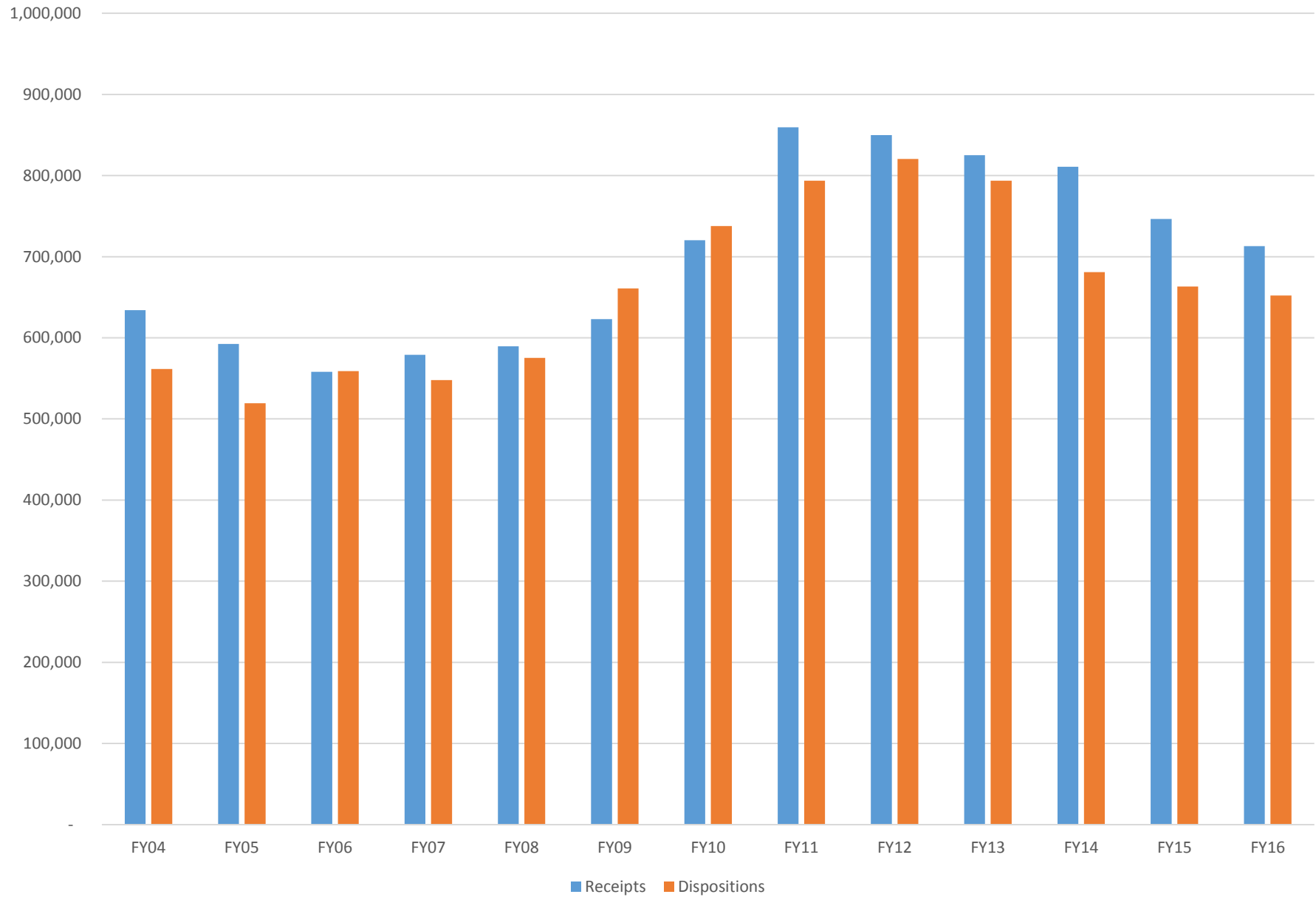
### **AFGE CBA:**

Covers non-attorney (paralegal decision writers and legal assistants) nationwide (with exception of Denver Region) including National Hearing Centers (NHCs) and National Case Assistance Centers (NCACs), and attorney adviser decision writers in Atlanta Region hearing offices. Also includes analysts and legal assistants in the Office of Appellate Operations (OAO). Currently 5456 total employees in the ODAR AFGE bargaining unit.

- OLMER is better POC for detailed info.
- Last negotiated July 16, 2012.
- Expired July 2016 but extended until March 2017.
- Negotiation preparations are currently underway, however, AFGE has requested to roll CBA for extended period. We defer to OLMER on latest status.

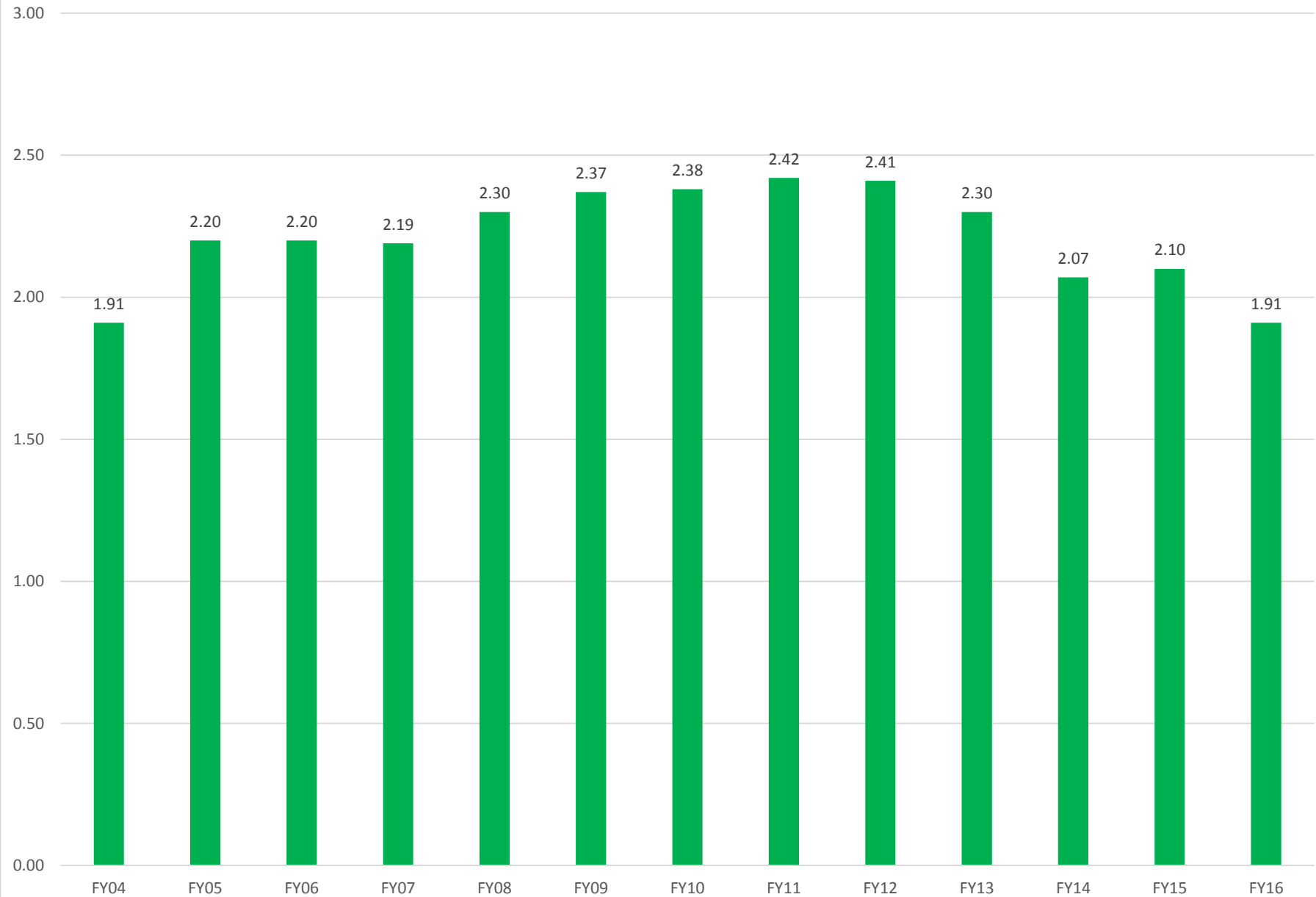
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Hearing Receipts and Dispositions (FY04 - FY16)



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Hearings Dispositions Per Day Per Available ALJ (FY04 - FY16)



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MAJOR PROJECTS COST BY YEAR							
PROJECT	2016*	2017	2018	2019	2020	2021	Total
<b>Security West</b>			(b) (5)				
Current RSF/USF: 820,676; 713,631							
Current Annual Rent: \$14.6M							
Proposed RSF/USF: \$11,000; TBD							
Proposed Annual Rent: \$16.9M							
<b>ODAR DC/VA</b>							
Current RSF/USF: 422,070; 354,489							
Current Annual Rent: \$14.9M							
Proposed RSF/USF: 270,000; 224,400							
Proposed Annual Rent: \$10.8M							
<b>Dallas RO</b>	\$ 14,352,500	\$ 4,900,000					
Current RSF/USF: 197,884; 174,082	construction	furniture					
Current Annual Rent: \$5.9M							
Proposed RSF/USF: 141,297; 122,867							
Proposed Annual Rent: \$5.7M							
<b>NCC3</b>	\$ 24,900,000						
Current RSF/USF: N/A	const. (\$21.4M) & furniture (\$3.5M)						
Current Annual Rent: N/A							
Proposed RSF/USF: N/A							
Proposed Annual Rent: N/A							
<b>ITC / 400 VA</b>	\$ 4,600,000	\$ 1,300,000					
Current RSF/USF: 66,716; 58,586	construction (ITC-\$4.1M, VA Ave-\$490K)	furniture					
Current Annual Rent: \$3.3M							
Proposed RSF/USF: 52,258; 43,548							
Proposed Annual Rent: \$2.7M							
<b>Frank Hagel</b>							
Current RSF/USF: 534,598; 388,139							
Current Annual Rent: \$3.6M							
Proposed RSF/USF: TBD							
Proposed Annual Rent: TBD							
<b>Addabbo</b>							
Current RSF/USF: 805,118; 666,300							
Current Annual Rent: \$12M							
Proposed RSF/USF: TBD							
Proposed Annual Rent: TBD							
<b>Mid Atlantic</b>							
Current RSF/USF: 532,057; 381,838							
Current Annual Rent: \$3M							
Proposed RSF/USF: TBD							
Proposed Annual Rent: TBD							
<b>Harold Washington</b>		\$\$\$\$					
Current RSF/USF: 685,664; 519,499		construction/furniture					
Current Annual Rent: \$9.2M							
Proposed RSF/USF: TBD							
Proposed Annual Rent: TBD							
<b>TOTAL</b>	\$ 43,852,500	\$ 6,200,000					

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\* - Funded

Security West lease expires in October 2020 (8 option years remain)

ODAR DC/VA Occupancy Agreements:

One Sykline Tower (AVA06619) OA expires 9/30/2019 (No prenegotiated option, however an extension will be necessary to align with current GSA schedule)

NHC/Park CTR II (AVA07671) OA expiration date extended to 6/5/2020 with options until 06/05/2022

Crystal Drive (AVA07285) OA expires 10/20/2019

\*\* ODAR has \$30M in their FY2017 budget for construction costs.

Dallas RO lease expires in October 2017 (No prenegotiated option, however a short term extension will be necessary to align with current GSA schedule)

NCC3 construction is actual RWA amount. Furniture estimate was adjusted from \$4.2M to \$3.5M

ITC lease expires in August 2017 (Extended to 2/11/19 - firm to 8/10/18)

VA Avenue lease expires in September 2017 (Extended to 9/29/19 - firm to 3/30/18)

# Data Analytics: Fraud Detection

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# Data Analysis

- As problems arise, or preferably before problems arise, we try to determine what is happening with our workload
- What we ask for depends upon what we are trying to figure out and what data is available
- The subject matter experts determine what the problem is we are trying to isolate or solve

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# Extracting and Analyzing the Data

There are a variety of platforms available to use in conducting data analysis.

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# Data Analysis

- The data analysis experts usually determine whether applicable data exists
- The data analysis experts array the data in visually interesting ways

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# Visualize the Data

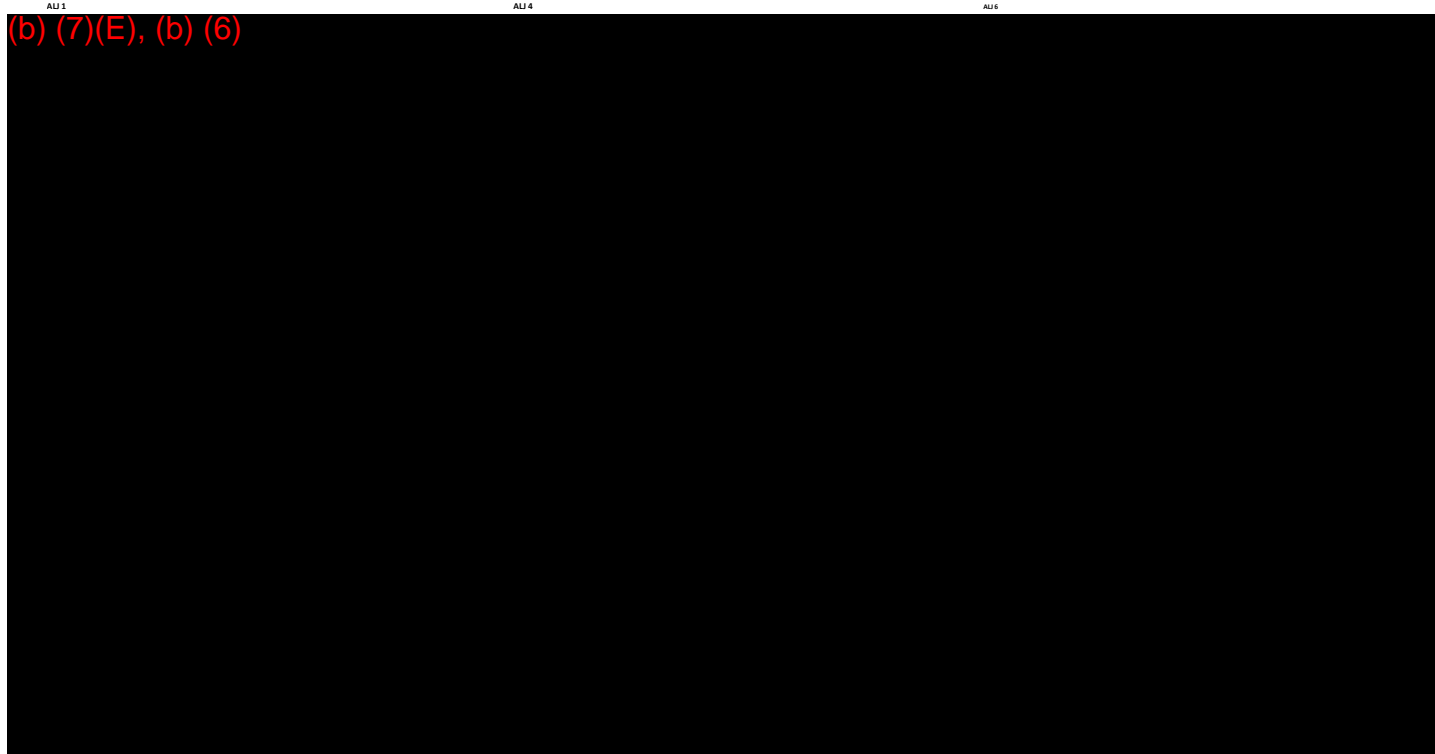
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## Vocational Expert Usage



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# Visualization

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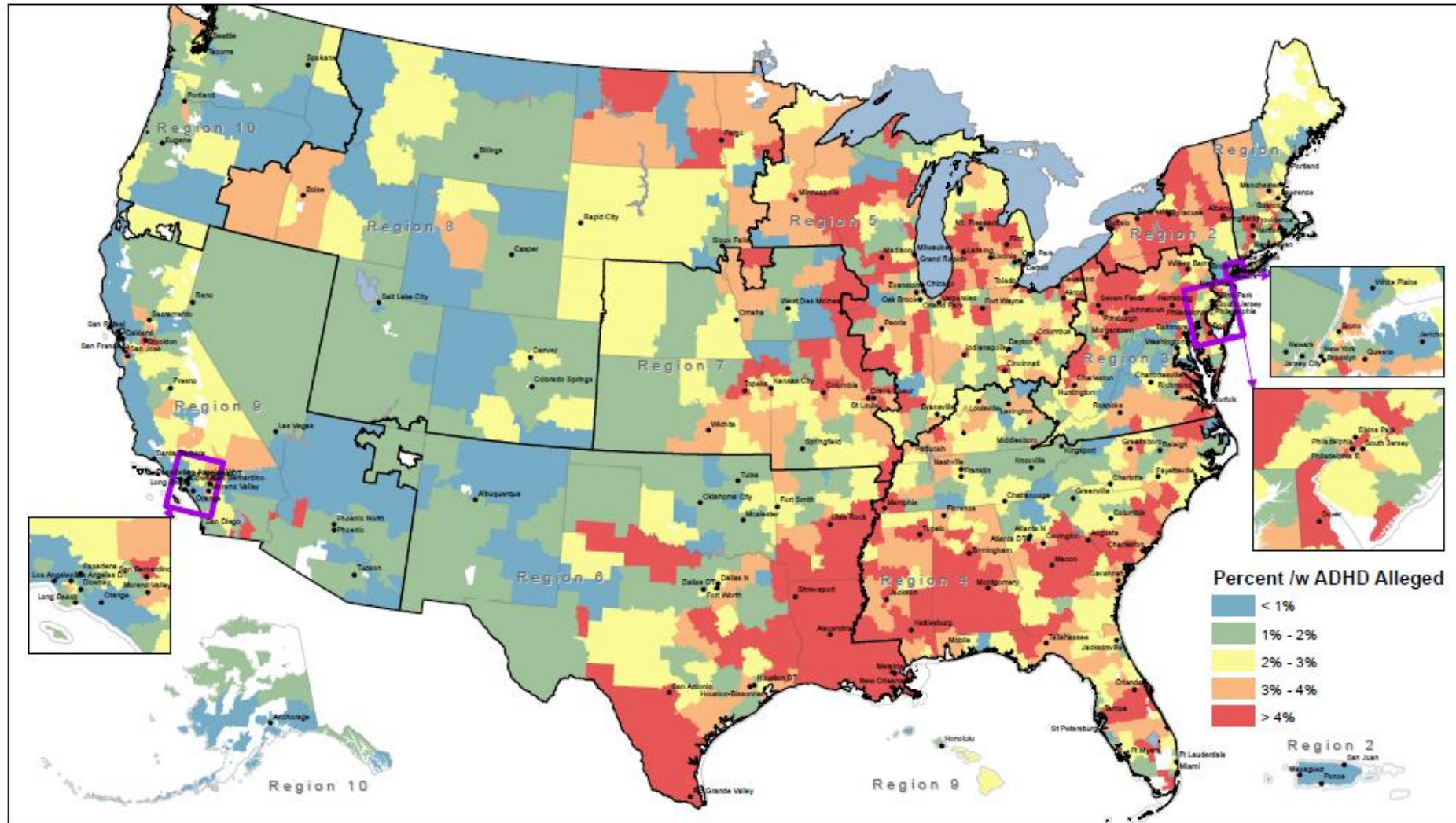
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Percent of ODAR Claims Alleging ADHD Impairment by Servicing Field Office, FY11 Dispositions



Source: DOORS, CPMS  
Prepared by: Ben Gunga  
ODAR, OESSI, DMIA  
02/01/2012

Notes:  
Sites in Guam, Virgin Islands and American Samoa not shown.

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## Analysis

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# Analysis

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- Where fraud or abuse is suspected, we refer the matter to the OIG

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# Unusual Incidence of Allowances by One Rep. Before a Specific ALJ

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# Unusual Incidence of Mental Impairments

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Per our office conference of Friday, March 5, 2010 enclosed please find the newest RFC which I would like to have Dr.  complete at your next visit at the VA Fort Smith.

Remember; please remind her that the column entitled "marked" is the important column that will get you on disability. I do not mind a few "moderates" or a couple of "extremes"; but, the "marked" column is the important one for purposes of finding you disabled.

Please return the completed form to be at your earliest convenience. If you have any comments or questions regarding any of the foregoing, please do not hesitate to contact me. Thank you for your kind consideration herein. I look forward to hearing from you regarding this matter.

Sincerely,

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# Data Analytics: Fraud Detection

## Top Issues for New Leadership: The First 100 Days

### COMPONENT EXECUTIVE SUMMARY: **Office of Systems**

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### *Promising Opportunities/Quick Wins*

- Bandwidth: Quantum Leap
- Mainframe Storage Encryption
- Mainframe: Plan for migration to Cloud for applicable workloads
- Staff & Organization
- Hiring for staff attrition to maintain workload performance capacity
- Collaboration tools
- Training for staff on current and modern technologies
- Employee technology refresh – printers
- Continue roll-out of SDS laptops

### *Key Partners*

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### *Key Partners*

- Advocate community; researchers/consortia; OMB

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## Top Issues for New Leadership: The First 100 Days



## COMPONENT EXECUTIVE SUMMARY: Operations

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### *Promising Opportunities/Quick Wins*

- **Expansion of Internet Social Security Number Replacement Card (iSSNRC)** - Including more states in SSA's iSSNRC process would improve customer service and have a positive impact on Operations by reducing traffic in field offices.
- **Expansion of Multifactor Authentication (MFA)** - Scheduled release on April 29, 2017 to coincide with the debut of the redesigned *my* Social Security web portal.
- **Release of New Customer Engagement Tool** - Scheduled release in Fall of 2017; Will allow for two-way communication with millions of my Social Security account holders, improving service while keeping more customers in the online channel using our self-service options.
- **Collocation of Grand Island, Nebraska SSA Field Office and IRS Audit Division Office—Reduce the Footprint Initiative** - Management and the labor union recently approved the combined floor plan. Construction to start in December 2016. The goal is to have the IRS space ready by March 2017.
- **Release of SMART Claim** - The release for the myAps portion of SMART Claim is planned for December 2016 and the iSSI portion of SMART Claim is currently planned for release in mid-year FY 2017. SMART Claim- Internet based Supplemental Security Income (iSSI) will allow the public to apply for SSI benefits online.
- **National Remittance and Accounting Unit (RAU)** - Our Remittance Process still relies on having a paper payment coupon with each payment received. Funding has been approved in FY17 to begin moving to a fully electronic environment.

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*Key Partners*

➤ OIG; IRS; GSA; DDSs.

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## Top Issues for New Leadership: The First 100 Days



**COMPONENT EXECUTIVE SUMMARY: Office of Legislation and Congressional Affairs**

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- The chart displays 12 groups of data, each represented by four horizontal bars. The bars are black and their lengths vary significantly between groups and within groups. The groups are separated by small gaps, and the bars within each group are also separated by small gaps. The overall layout is clean and professional, with a white background and no visible axes or labels.

## Pending Decisions & Actions

- Upcoming Hearings (Congress sets schedule, OLCA helps prepare SSA witnesses and testimony)

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## *Promising Opportunities/Quick Wins – N/A*

### *Key Partners*

#### ➤ **Key congressional or outside contacts:**

*Senate Finance Committee* - Chairman Orrin Hatch; Ranking Member Ron Wyden.  
Key issues: Solvency, the DI and SSI programs, ALJ hearings, improper payments, representative payees, DCPS, and service delivery.

*House Ways and Means Committee* - Chairman Kevin Brady. Key issues: Windfall Elimination Provision, solvency, improper payments.

Ranking Member Sander Levin. Key issues: solvency, implementation of same-sex marriage Supreme Court decision, service delivery.

*House Ways and Means, Social Security Subcommittee* - Chairman Sam Johnson.

Key issues: fraud in the DI program, IT modernization, implementing the Bipartisan Budget Act of 2015, representative payee program, DCPS, the DI program in general, Return to Work, SSA's implementation of NICS.

Ranking Member Xavier Becerra. Key issues: service delivery and adequacy of administrative budget, benefit adequacy, the DI program.

*Subcommittee on Human Resources* - Chairman Vern Buchanan/Ranking Member Lloyd Doggett. Key issues: the Supplemental Security Income program.

*Senate Homeland Security and Government Affairs*- Chairman Ron Johnson.

Key issues: Wisconsin hearing offices, SSA's death information.

Ranking Member Tom Carper. Key issues: SSA's death information, improper payments.

Senator James Lankford. Key issues: the DI program in general, DI fraud, ALJs, the administrative appeals process.

*House Oversight and Government Reform* - Chairman Jason Chaffetz/Ranking Member Elijah Cummings. Key issues: cybersecurity, FISMA, FITARA, ALJs, DCPS.

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## Top Issues for New Leadership: The First 100 Days



## COMPONENT EXECUTIVE SUMMARY: Office of Human Resources

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### Promising Opportunities/Quick Wins

- **Anti-Harassment Program** - The agency implemented a standard operating procedure in FY 2016 to maintain a workplace free from discrimination and harassment. We will continue to review and evaluate the program to make any necessary changes to ensure its efficiency.

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- | Government          | Percentage |
|---------------------|------------|
| Current government  | 100%       |
| Previous government | 0%         |

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### *Key Partners*

- **OPM; Unions** (e.g., the American Federation of Government Employees (AFGE), the National Treasury Employees Union (NTEU) and the International Federation of Professional and Technical Engineers (IFPTE); and **Management Associations**

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# Top Issues for New Leadership: The First 100 Days

## COMPONENT EXECUTIVE SUMMARY: Office of the General Counsel



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### *Pending Decisions and Actions*

(N/A)

### *Promising Opportunities*

- Compliance with the new Freedom of Information Act (FOIA)
  - To comply with the new FOIA law, we are updating our FOIA regulations, procedures, and training. We are working with the Environmental Protection Agency to procure FOIA Online, a web based application that will aid in processing FOIA requests. These procedural changes should improve the position by which SSA responds to FOIA requests.

### *Key Partners*

- OGC collaborates with the Office of Retirement and Disability Policy, the Office of Disability Adjudication and Review and the DOJ to represent SSA in program and general litigation before federal district and appellate courts.
- OGC develops and implements privacy and disclosure policy to protect the records of members of the public.
- OGC partners with the Office of Inspector General to combat fraud and protect the SSA Trust Fund.

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## Top Issues for New Leadership: The First 100 Days

### COMPONENT EXECUTIVE SUMMARY:

#### **Office of Disability Adjudication and Review**

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### *Promising Opportunities/Quick Wins*

- **Natural Language processing (NLP) and Related Technologies** - The Appeals Council is testing the use of NLP to scan ALJ decisions for language that suggests a higher likelihood of an error so we can select and identify those cases for a pre-effectuation quality review.
- **Video Usage**- We continue our effort to increase the number of sites that can accommodate video hearings, including co-locating video facilities in field offices and partnering with the Veterans Administration and other government entities. If we expand in this area, we will provide better service to claimants and reduce costs by sharing common space with other SSA components.
- (b) (5)
- **Career Development Programs** - Our Plan for Compassionate and REsponsive Service (CARES) outlines our current comprehensive and multi-layered approach to deal with the immediate crisis of the growing number of hearings pending and increasing wait times. We have created the COMPASS career development program under the CARES initiatives to provide more flexibility in our hearing offices. The COMPASS program is a component-wide career development program that will provide virtual details to employees depending on their respective grade levels. We have begun the recruiting effort and expect to roll out the program in the second and third quarters of FY 2017.

### *Key Partners*

OPM; federal courts; Disability Determination Services (DDS)

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## Top Issues for New Leadership: The First 100 Days

### COMPONENT EXECUTIVE SUMMARY: **Office of the Chief Strategic Officer**



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### *Promising Opportunities/Quick Wins*

- Accelerate Data – Driven Decisions
  - Continue supporting the agency Performance Management Process by providing data analytics in setting, monitoring and analyzing SSA Agency Priority Goals
  - Promote advanced analytics literacy with enhancement to existing intranet website for a dynamic user experience
  - Host Analytics Community of Interest events and additional analytics training (Gerald Ray Academy)
  - Conduct in-depth analytics maturity assessments and deliver roadmaps for expanding analytics capacity in agency components

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- Improve Agency Performance and Integrate Strategy and Performance
  - Increase agency awareness of program performance management principles
  - Continue to participate in interagency performance community initiatives and activities
  - Strengthen the Performance Management Process
  - Ensure development of outcome based performance measures that support ASP goals and objectives
- Implement a successful Enterprise Risk Management (ERM) program

### **Key Partners**

- Agency Employees–Provide subject matter expertise on program performance and progress in achieving agency goals
- Agency Priority Goal Leaders and Deputy Goal Leaders–Provide executive leadership, guidance and direction in establishing and achieving agency priority goals
- Office of Management and Budget–Provides guidance, direction and clearance on mandated deliverables
- Social Security Advisory Board (SSAB)–Provides advice regarding strategic planning and performance initiatives
- Open Government Steering Committee–Provides executive support related to Open Government initiatives
- Improper Payment Oversight Board–Provides executive support related to Improper Payment initiatives
- Executive Internal Control Committee (EICC)–Provides executive oversight and guidance to ensure agency controls are operating as intended, to guide activities to strengthen controls, and to manage issues relate to the annual Agency Financial Audit
- National Anti-Fraud Committee (NAFC)–Provides executive support and guidance for agency anti-fraud activities to ensure the integrity of Social Security programs
- Information Technology Investment Review Board (IT IRB)–Reviews and approves all significant Information Technology Investments, ensuring they align with agency strategy, priorities and goals
- Executive Resources Board (ERB)–Provides executive support to senior-level personnel decisions
- Contract Review Board–Provides executive review of high value agency contracts to identify potential savings and efficiencies
- Vision 2025 Advocacy Groups– Provide ideas and insights to improve our services , comprised of various advocacy groups: Leadership Council of Aging Organizations (LCAO), umbrella group of advocates for seniors, National Social Security and SSI Advocates, umbrella group of advocates for beneficiaries
- Labor Unions–Represent agency bargaining unit employees, provide insight into the issues and challenges the labor unions deem critical to delivering the agency’s mission
- Analytics Community of Interest–Provides guidance for analytics decisions, comprised of analytics practitioners, executives and those interested in promoting agency data analytics to derive value from our information assets

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Last Update 11/13/16

## Top Issues for New Leadership: The First 100 Days

## COMPONENT EXECUTIVE SUMMARY: Office of Communications



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■ [REDACTED]  
[REDACTED]  
[REDACTED]  
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### Promising Opportunities/Quick Wins

➤ **my Social Security Week** – Historically, this themed week has produced increases in the use of our online services in the range of 20 percent to 25 percent. (b) (5)

Last Update 11/17/16

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- (b) (5) [REDACTED]  
[REDACTED]  
[REDACTED]

### *Key Partners*

- **Targeted Outreach and Media Relations** – Various print and online outlets; radio; television; and organizations such as AARP, American Federation of Teachers, Consortium for Citizens with Disabilities, Department of Veterans Affairs, etc. (b) (5) [REDACTED].

Last Update 11/17/16

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## Top Issues for New Leadership: The First 100 Days

**COMPONENT EXECUTIVE SUMMARY:** Office of the Chief Actuary

(b) (5)

5

(b) (5)

7

*Promising Opportunities/Quick Wins – N/A*

## Key Partners

- Board of Trustees of the Old-Age, Survivor, and Disability Insurance Trust Funds
- House Ways and Means Committee
- Senate Finance Committee
- Social Security Advisory Board, and its Technical Panels
- Office of Management and Budget

Last Update 11/17/16

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**COMPONENT EXECUTIVE SUMMARY: Office of Budget, Finance, Quality, and Management**

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(b) (5)

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Last update 11/18/16

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(b) (5)

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#### *Pending Decisions and Actions*

- (b) (5)
- [Redacted text block]

#### *Promising Opportunities/Quick Wins*

- (b) (5)
- [Redacted text block]
- [Redacted text block]

- **Enterprise Risk Management (ERM):** Continue developing our agency's implementation ERM. ERM is in response to OMB Circular A-123, requiring Federal agencies to integrate risk management and internal control functions into the daily management practices. Agencies are also required to establish and implement an assessment process based on the Government Accountability Office's (GAO) Standard for Internal Control in the Federal Government (Green Book). ERM will improve the effectiveness of management processes and decision-making within the agency.

Last update 11/18/16

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### Key Partners

- **Office of Management and Budget (OMB)** – This agency is tasked with the government-wide management of the Executive branch. It represents the White House and its policies are binding on all Executive branch agencies. OMB examiners will confer with SSA on our priorities, critical issues, and possible legislative proposals.
- **House and Senate Labor HHS Subcommittee Staff** – Each house of Congress has an appropriations committee, which is further divided into twelve appropriations subcommittees; SSA falls under the Labor, HHS, Education, and Related Agencies Subcommittee.
- **House and Senate Budget Committees** – Each house of Congress has a budget committee that reviews the President's Budget. These committees draft Congress' annual budget resolution and propose improvements to Congressional budget processes.
- **Congressional Budget Office (CBO)** – CBO is the nonpartisan budget review office in the Legislative branch. CBO analysts review the President's Budget and offer their alternative estimates to Congress, including estimates SSA provides in the Congressional Justification.
- **Government Accountability Office (GAO)** – GAO is the nonpartisan auditing and investigative agency of Congress in the Legislative branch. They have recently conducted audits regarding SSA's IT modernization plan and service delivery challenges.
- **Social Security Advocacy Groups** – These are organizations, such as the National Council of Social Security Management Associations and AARP, that provide advocacy services and support to employees and beneficiaries of Social Security.
- **Labor Unions** – AFGE, NTEU, and ITEFA are Federal employee unions that provide workers at SSA and other government agencies with legislative advocacy and legal representation.
- **General Services Administration (GSA)** – We work with GSA for budgetary obligations, master housing, and leasing for all GSA owned, delegated, and leased properties nationwide.
- **Department of Homeland Security (DHS)** – We work with the Federal Protection Service (FPS) for our physical security nationwide. We also work with the Federal Emergency Management Agency (FEMA) for our nationwide emergency management (Continuity of Operations). We work with the Interagency Security Committee for our security standards.
- **Federal Bureau of Investigation (FBI), Department of Defense (DOD), and the Central Intelligence Agency (CIA)** – We work with these agencies for our nationwide Insider Threat and Counter Intelligence programs.
- **Social Security Advisory Board (SSAB)** – We work with the SSAB on matters of policy and administration of the Old-Age, Survivors, and Disability Insurance and the Supplemental Security Income programs.
- **Department of the Treasury (Treasury)** – We partner with Treasury, as our disbursing agent, to make benefit and administrative payments and to recover overpayments.

Last update 11/18/16

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## Project Health and Financial Data<sup>1</sup>:

Agency Cloud Infrastructure (ACI) (8353)		Schedule	Cost	Status: Completed and in-flight	
Budget:	\$ 14,247,200.69	Cost Actuals:	\$ 12,881,660.86	FY18 Anticipated Cost:	(b) (5)
<b>Description:</b> Agency Cloud Infrastructure (ACI) enables a modern platform to support modern and emerging technologies more easily. We will be able to increase and decrease storage needs, as necessary, ensuring that we pay for what we need at any given time. We have created a modern development environment, which takes advantage of Platform as a Service, Infrastructure as a Service, and Software as a Service to allow our developers to do their jobs better and faster, in a DevOps environment. The vision for ACI is to provide a suite of Cloud Offerings with a consistent platform across the software lifecycle to provide relevant and modern services. To date more than 250 servers have been provisioned in Amazon Web Services (AWS) supporting the cloud infrastructure, Enterprise Data Warehouse (EDW), KNOT (Oracle Tools Environment), Disability Case Processing System (DCPS), and Multi-Channel Communication, reducing typical acquisition time to allow projects to begin working immediately.					
<b>Remarks:</b> 12% cost overburn in FY16; ; variances between 10% and <30% are reported as yellow on the Federal IT Dashboard					

Benefit Rate Increase/Cost of Living Adjustment (BRI/COLA) (6681/8013/9031)		Schedule	Cost	Status: Cyclical	
Budget:	\$ 3,675,230.47	Cost Actuals:	\$ 1,541,883.83	FY18 Anticipated Cost:	(b) (5)
<b>Description:</b> BRI/COLA is a legislative annual cyclical operation to apply updated annual rates to the Title II Master Beneficiary Record (MBR). SSA is required by law to pay the cost-of-living adjustment (COLA) to Title II beneficiaries. Even when the COLA equals 0.0%, active records on the Title II Master Beneficiary Record (MBR) must be updated to reflect Medicare Part B premium amounts. The timely update of the MBRs allows SSA to ensure the timely and accurate payment delivery of Title II payments to 60 million beneficiaries each month.					
<b>Remarks:</b> 22% cost underburn in FY16; variances between 10% and <30% are reported as yellow on the Federal IT Dashboard					

Customer Engagement Tools (CET) (8188/8189/8190/8191)		Schedule	Cost	Status: Completed and in-flight	
Budget:	\$ 13,435,984.03	Cost Actuals:	\$ 5,496,870.82	FY18 Anticipated Cost:	(b) (5)
<b>Description:</b> CET adds new infrastructure within SSA's Enterprise Architecture to allow interactions over multiple communication channels to facilitate business between the agency and the public. Both Dynamic Help, Click to call back and Message Center have been implemented to date. Click to chat is scheduled for FY17.					
<b>Remarks:</b> 21% cost underburn in FY16; variances between 10% and <30% are reported as yellow on the Federal IT Dashboard					

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<sup>1</sup> Financial Data encompasses FY16 – FY18 budget and labor cost data in investment management tool as of report date. Prior FY data and associated Special Expense Item (SEI) costs not included. Cost variances based on FY16 budget vs FY16 cost actuals.





<b>Electronic Access Mandatory Multifactor Authentication (MFA) (8211)</b>		<b>Schedule</b>	<b>Cost</b>	<b>Status: Completed and in-flight</b>	
<b>Budget:</b>	<b>\$ 4,355,611.97</b>	<b>Cost Actuals:</b>	<b>\$ 2,687,712.95</b>	<b>FY18 Anticipated Cost:</b>	<b>(b) (5)</b>
<b>Description:</b> MFA supports the multi factor authentication requirements in Executive Order 13681 and requires two-factor authentication for applications behind Electronic Access. The 1 <sup>st</sup> release of MFA was successfully implemented and based on external pressure – was rolled back. We are on track for a release with increased features in April 2017.					
<b>Remarks:</b> 61% cost overrun in FY16; ; variances >30% are reported as red on the Federal IT Dashboard					

<b>Electronic Case Analysis Tool (eCAT) (8309/5548/6717/8088)</b>		<b>Schedule</b>	<b>Cost</b>	<b>Status: Ongoing</b>	
<b>Budget:</b>	<b>\$ 5,815,189.49</b>	<b>Cost Actuals:</b>	<b>\$ 3,778,794.01</b>	<b>FY18 Anticipated Cost:</b>	<b>(b) (5)</b>
<b>Description:</b> eCAT is a policy compliant web-based application designed to assist the user throughout the sequential evaluation process. The tool aids in documenting, analyzing, and adjudicating the disability claim in accordance with SSA regulations. eCAT utilizes “intelligent pathing” and quality checks to assist the user in addressing critical policy issues relevant to the claim. eCAT is a critical component of the Disability Case Processing System (DCPS). It continues development of functionality necessary to support DCPS as it is developed and rolls out nationally and other functionality needed to support programmatic and policy updates/changes.					
<b>Remarks:</b> 16% cost overrun in FY16; ; variances between 10% and <30% are reported as yellow on the Federal IT Dashboard					

<b>Health Information Technology (HIT) (9148/6026/6718)</b>		<b>Schedule</b>	<b>Cost</b>	<b>Status: Ongoing</b>	
<b>Budget:</b>	<b>\$ 10,070,117.32</b>	<b>Cost Actuals:</b>	<b>\$ 1,139,078.89</b>	<b>FY18 Anticipated Cost:</b>	<b>(b) (5)</b>
<b>Description:</b> The Health Information Technology (HIT) project completed nationwide implementation of the electronic medical exchange with the Department of Defense (DOD) on 2/1/2016. This effort was the culmination of many years of close coordination between SSA and DOD. From November 2015 through September 2016, DOD has processed over 15,800 electronic requests for medical evidence from SSA, reducing the amount of time it takes to receive DoD-held medical evidence from an average of 5 weeks to minutes. The agency’s Health IT team is also continuing to work closely with Veterans Administration (VA) to begin the electronic exchange of medical evidence in the first quarter of Fiscal Year 2017. Both of these efforts are part of SSA’s joint plan of action to improve the sharing of medical information between SSA, DoD and VA, intended to improve service to Wounded Warriors, Service members, and Veterans.					
<b>Remarks:</b> 30% cost overrun in FY16; variances >30% are reported as red on the Federal IT Dashboard					

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HR Portal (6556/8054)		Schedule	Cost	Status: Completed and in-flight	
Budget:	\$ 5,560,609.44	Cost Actuals:	\$ 2,948,521.76	FY18 Anticipated Cost:	(b) (5)
<b>Description:</b> The HR Portal provides employees with a web-based operation for viewing HR applications. Two services were in an initial release. In FY16, we continued to enhance HR Portal data and services, using agile software development methodologies with the implementation of multiple releases of Employees Reports and the initial e7B release on 06/11/16. The Agile teams adoption of modern methodologies and automated testing tools such as Cucumber and Selenium helped drive team collaboration, facilitated multi-cycle regression testing, and resulted in the delivery of a quality product.					
<b>Remarks:</b> 11% cost overrun in FY16; ; variances between 10% and <30% are reported as yellow on the Federal IT Dashboard					

Internet Application Status (iAPS) Enhancements (8197)		Schedule	Cost	Status: Completed	
Budget:	\$ 2,109,477.98	Cost Actuals:	\$ 3,431,724.53	FY18 Anticipated Cost:	(b) (5)
<b>Description:</b> myAPS provides secure status on benefit claims at the initial, reconsideration and hearing level. It is functional behind the mySocialSecurity portal. It includes usage and local Management Information (MI). There were technical challenges due to the interaction between numerous siloed legacy systems into modern software that affected the schedule and the cost.					
<b>Remarks:</b> Finished beyond original schedule. 78% cost overrun in FY16; variances >30% are reported as red on the Federal IT Dashboard					

Internet SSN Replacement Cards (iSSNRC) (5886/8314)		Schedule	Cost	Status: Completed and in maintenance	
Budget:	\$ 3,323,310.68	Cost Actuals:	\$ 2,144,778.45	FY18 Anticipated Cost:	(b) (5)
<b>Description:</b> The addition of the online Social Security number replacement card requests to the MySocialSecurity portal was implemented. Each year the agency provides 10 million replacement cards and providing this service online diverts customer traffic away from field offices and reduces operational workloads.					
<b>Remarks:</b> Variances less than 10% are reported as green on the Federal IT Dashboard					

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Investment Management Tool (IMT) (8365)		Schedule		Cost	Status: Completed and in-flight	
Budget:	\$ 6,200,378.77	Cost Actuals:	\$ 2,132,184.22		FY18 Anticipated Cost:	(b) (5)
<b>Description:</b> OS worked with the IT Investment Process (ITIP) team to gather requirements and implemented the agency’s IT Investment Management Tool (IMT). IMT is a standard Portfolio and Project Management (PPM) tool used in support of the agency’s Capital Planning and Investment Control (CPIC) process. In the past year, functionality was developed to support project management and the budget formulation processes used by the agency’s IT Investment Review Board (ITIRB) during prioritization and selection of IT investments. Customers across the agency are able to submit their IT requests for labor and non-labor resources using one central application. IMT provides customers with project management information used to monitor performance and supports external reporting. It has created needed transparency into the budget and planning areas.						
<b>Remarks:</b> 13% cost overrun in FY16; ; variances between 10% and <30% are reported as yellow on the Federal IT Dashboard						

SMART Claim iSSI (8194)			Schedule	Cost	Status: In-flight	
Budget:	\$ 2,735,848.91	Cost Actuals:	\$ 2,282,885.58		FY18 Anticipated Cost:	(b) (5)
<b>Description:</b> iSSI incorporates the capability to apply for SSI (T16) online. The functionality will be added to the current iClaim, includes management information and ensures a single submission application.						
<b>Remarks:</b> 42% cost underburn in FY16; variances >30% are reported as red on the Federal IT Dashboard						

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# Transition Team DCPS2 Update

December 13, 2016

**Linda Kerr-Davis**  
Chief Program Officer

**Michelle Minton**  
Chief Product Owner

**John Garrigues**  
Deputy Chief Program Officer

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# Agenda

- Purpose – Why build DCPS?
- Historical Timeline
- DCPS2 Road Map
- Early Adopter Release (EAR)
- Site Status
- Tracking Velocity
- Costs and Timelines
- External Oversight
- OIG Audit Reports
- User Feedback

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# Purpose – Why build DCPS?

- Improve service to the American public
  - Optimized productivity
  - Enhance accuracy and consistency
- Control cost
  - Code ownership
  - Change management
- Improve security
  - Effective disaster recovery
  - Fewer entry points
- Improve workforce agility
  - Better tools for employees
  - Borderless processing (workload sharing)

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# DCPS Historical Timeline

- 2007 Project started
- 2010 Contract awarded
- 2014 CPO established
- 2015 DCPS1 terminated and Agile started
- 2016 Through Line delivered
- 2016 Early Adopter Release (next week)

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# DCPS Product Road Map

Last Updated: 12/2/2016

(b) (5)

Through Line Completed:  
3/31/2016

DCPS2 Early Adopter Release:  
12/17/2016

Sites 4 - 6:  
3/18/2017

Sites 7 - 9:  
6/24/2017

✓ PI* 0	✓ PI 1	✓ PI 2	✓ PI 3	✓ PI 4	(b) (5)	
9/30/15 – 12/1/15	12/2/15 – 1/3/16	1/4/16 – 5/10/16	5/11/16 – 8/16/16	8/17/16 - 11/29/16		
<ul style="list-style-type: none"><li>Established systems environments</li><li>Microstrategy configuration</li><li>Organizational Set Up</li><li>Created Receipt Queue with quality check</li><li>Basic case header</li></ul>	<ul style="list-style-type: none"><li>User Profiles</li><li>Introduced sub-set of dashboard categories</li><li>Manual case receipt</li><li>Manual case assignment</li><li>Template administration</li><li>Claimant Correspondence</li><li>Case Analysis: Allowance forms</li><li>Added case sub-header</li></ul>	<ul style="list-style-type: none"><li>DIB claims only</li><li>User roles &amp; tasks</li><li>Switching Dashboard Views</li><li>831 Closure form</li><li>Signatures for closure forms</li><li>Consultative Exam (CE) Request</li></ul>	<ul style="list-style-type: none"><li>Quality Check for Missing 1696</li><li>Quality Check for Missing Appointed Rep</li><li>Detect Receipt of 827, Remove Issue</li><li>Auto Case Receipt</li><li>Evidence Request Framework</li><li>CE Request</li><li>CE Scheduling Framework</li><li>Case Activity Framework</li><li>RFC Assessment</li><li>831 PDF</li><li>Print Framework</li><li>Table Filters, Sort and Find Feature</li><li>Standardization of UI Components</li></ul>	<p>Support for QDD/CAL cases</p> <ul style="list-style-type: none"><li>DI</li><li>DI/DIB Concurrent</li><li>Physical Allegations</li><li>Fully Favorable Allowances</li><li>State Isolation</li><li>Transfer to Legacy</li><li>Auditing</li><li>Security</li><li>Error Logging</li><li>Transaction Management</li><li>Evidence Requests to Medical Sources</li><li>FOFAE</li><li>Case Notes</li><li>Disability Determination Explanation PDF</li><li>Case Activity Log</li><li>Fiscal – MER</li><li>Updates After Transfer</li><li>DE Authority</li></ul>		

\* PI = Product Increment, normally consists of seven 2-week sprints (approximately one Quarter)

12/7/2016

DCPS | Office of the Chief Program Officer  
Completed

Committed

5  
Forecast

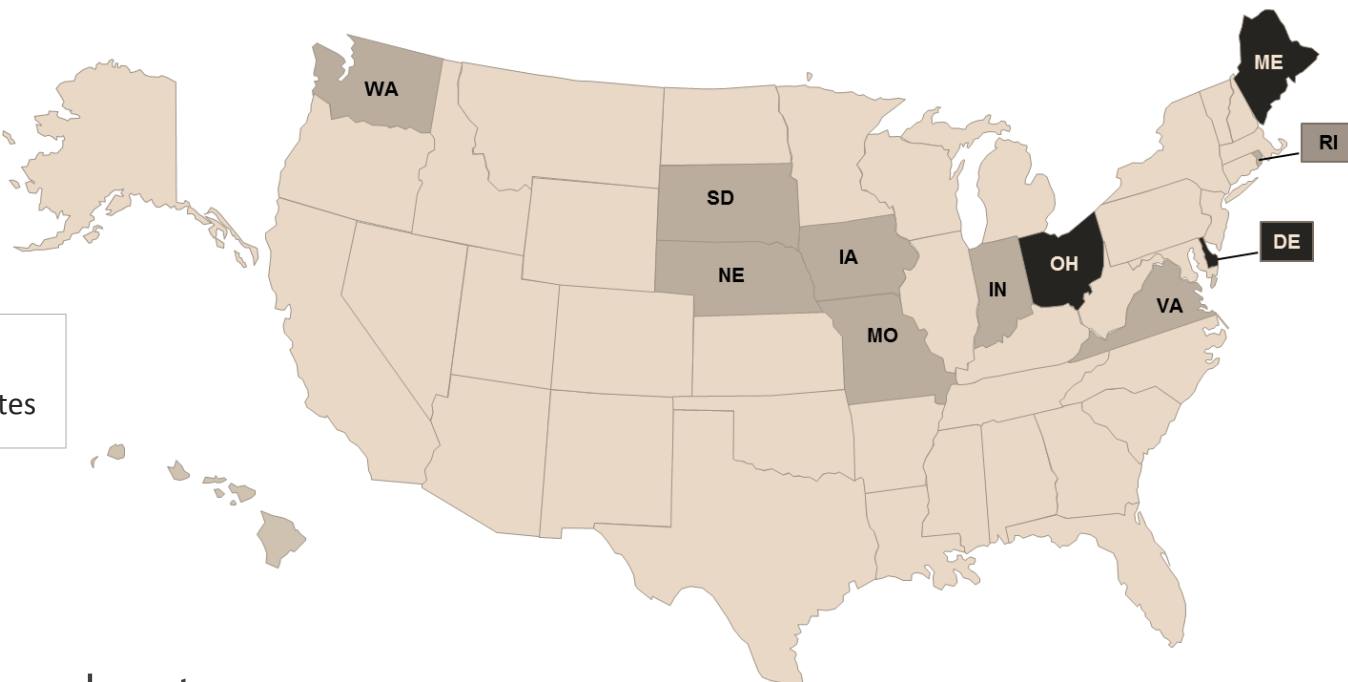
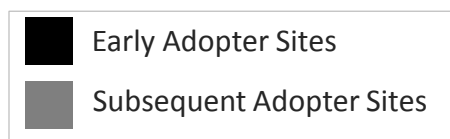


# DCPS2 Early Adopter Release (EAR)

- Provides the capability for a DDS to expedite adult physical fully favorable Initial Claims (Quick Disability Determination and Compassionate Allowance functionality)
- Deliver by end of December 2016
- Deliver to two or more DDSs
- Major Features planned following EAR are:
  - Enhanced Functionality
  - Technical Debt
- Will continue to iteratively deliver value-added software through continuous integration and continuous deployment

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# Site Status

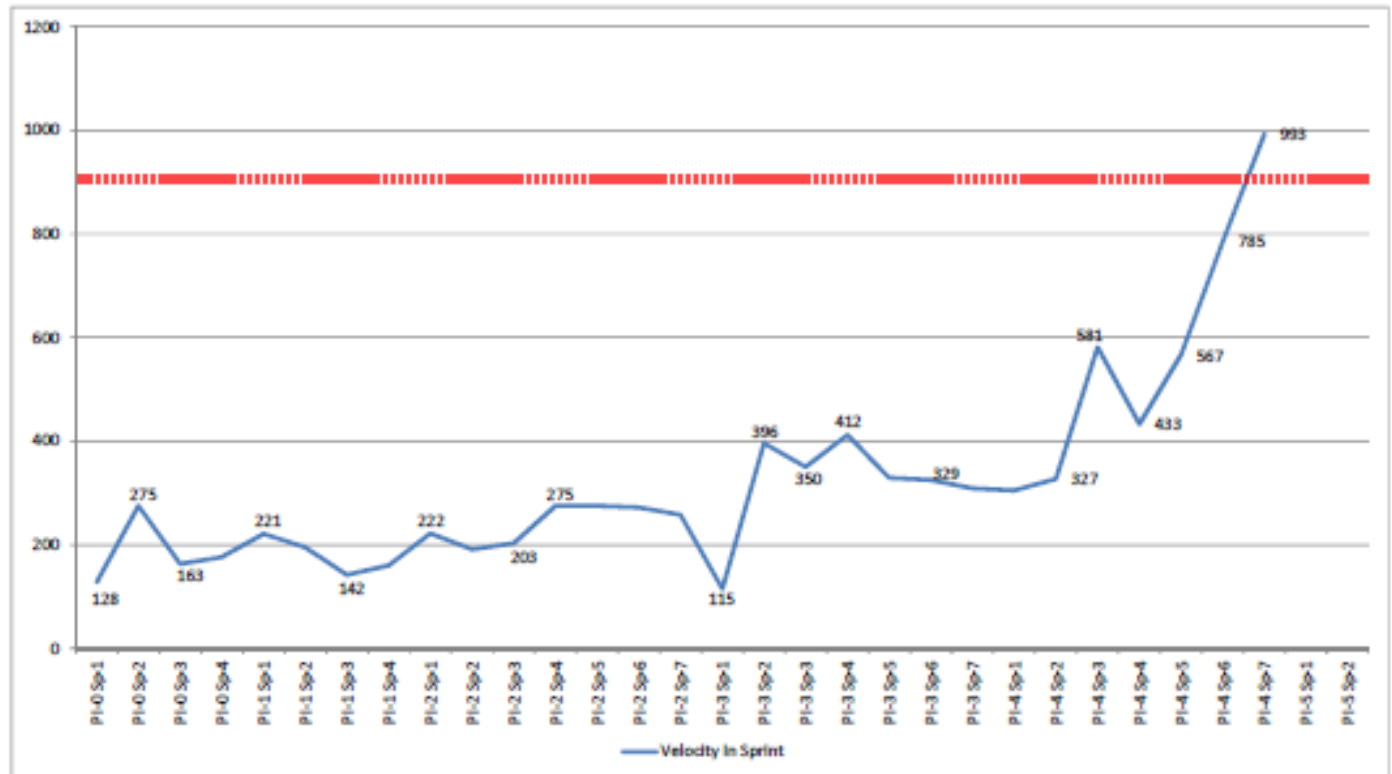


- Will deploy throughout FY17 based on capacity and functionality fit with DDS business process
- 11 sites have asked for DCPS2 (20% of all DDS sites)

Region	Site(s)	Size	SDM	Legacy	Structure
Chicago	Ohio	Large	No	IDS	Central
Philadelphia	Delaware	Small	No	MIDAS	Central
Boston	Maine	Small	Yes	IDT	Central
Boston	Rhode Island	Small	No	IDS	Central
Chicago	Indiana	Medium	No	IDS	Central
Denver	South Dakota	Small	No	IDS	Central
Kansas City	Nebraska	Small	No	Indep	Central
Kansas City	Missouri	Medium	Yes	MIDAS	Decentral
Kansas City	Iowa	Small	No	IDS	Central
Philadelphia	Virginia	Medium	No	IDS	Decentral
Seattle	Washington	Medium	Yes	IDS	Decentral

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# Tracking Velocity



Estimate of 5x reference from April 2016 report.

Actual velocity (pace of development) of DCPS2 development.

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# Cost Breakdown

Shutdown &  
Restart  
July to Sept '15

## Preparation for DCPS2 development activities (July through September 2015)

	FY15 (3 months)
SEI (includes CTR) <sup>1</sup>	\$ 8,584,534
Non-SEI CTR <sup>2</sup>	\$ -
SSA WY Total Costs <sup>3</sup>	\$ 3,369,413
Travel	\$ 133,954
<b>Total DCPS</b>	<b>\$ 12,087,901</b>

Agile  
Sprints  
FY 16 - 21

## DCPS2 development activities (FY16 through FY21)

	FY16	FY17	(b) (5)
SEI (includes CTR) <sup>1</sup>	\$ 17,116,177	\$ 16,653,526	
Non-SEI CTR <sup>2</sup>	\$ -	\$ -	
SSA WY Total Costs <sup>3</sup>	\$ 13,309,075	\$ 9,003,588	
Travel	\$ 232,970	\$ 214,580	
<b>Total DCPS</b>	<b>\$ 30,658,223</b>	<b>\$ 25,871,694</b>	

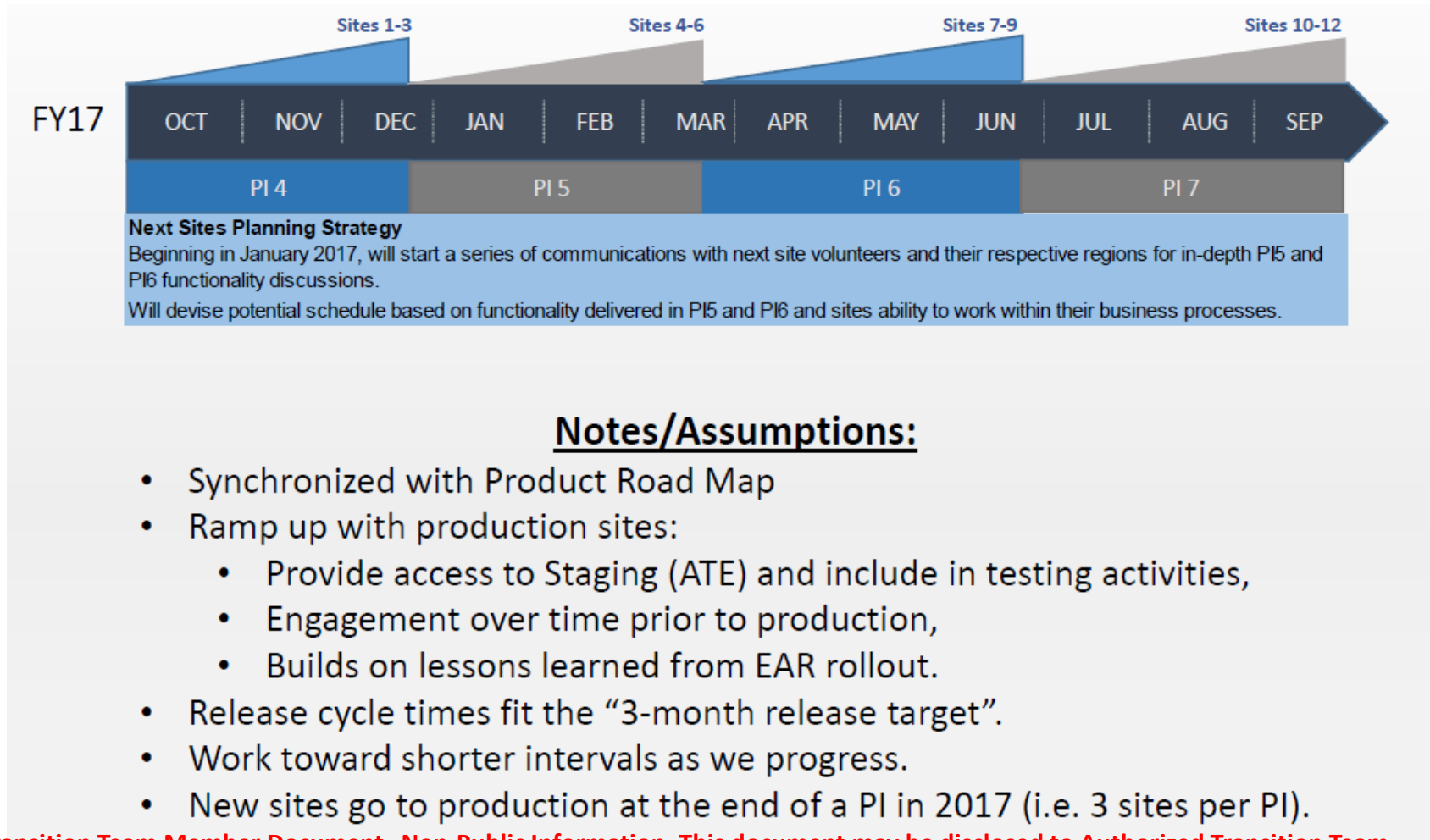
<sup>1</sup> FY 16 SEI costs = \$17,105,557.41 from R327 + \$10,620.05 from R392D2 (small IT purchase SEI). FY17 and FY18 estimates are based on our FY17 risk based budget. FY 19 estimate is extrapolated from the FY18 submission. FY21 and FY21 estimates plan for 1 Agile development team from contractor resources plus \$1.7M for infrastructure costs.

<sup>2</sup> The "Non-SEI CTR" category is historical in nature, but will be displayed in order to remain consistent in our reporting.

<sup>3</sup> WY Costs are based on Actual expenditures where possible, and based on forecasts from Prism/IMT when no actuals are available. In FY15, 1 WY= \$139,578. In FY16, 1 WY = \$141,000. In FY17, 1 WY = \$145,642.

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# FY17 Site Onboarding Timeline



## Notes/Assumptions:

- Synchronized with Product Road Map
- Ramp up with production sites:
  - Provide access to Staging (ATE) and include in testing activities,
  - Engagement over time prior to production,
  - Builds on lessons learned from EAR rollout.
- Release cycle times fit the “3-month release target”.
- Work toward shorter intervals as we progress.
- New sites go to production at the end of a PI in 2017 (i.e. 3 sites per PI).

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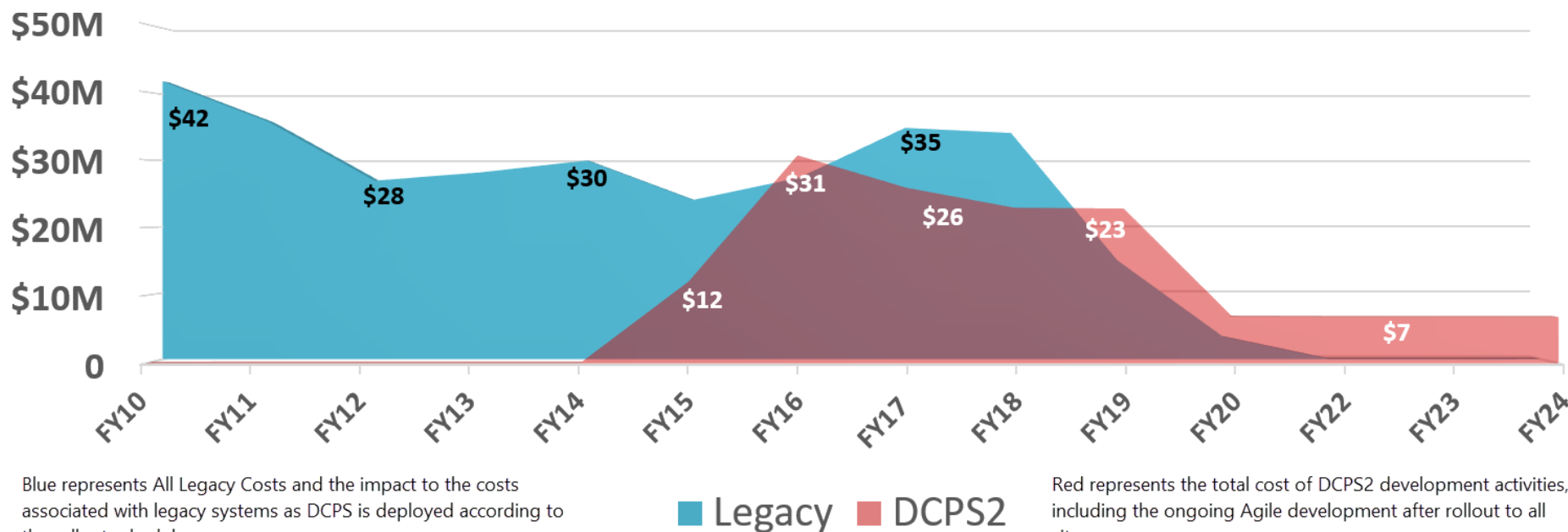
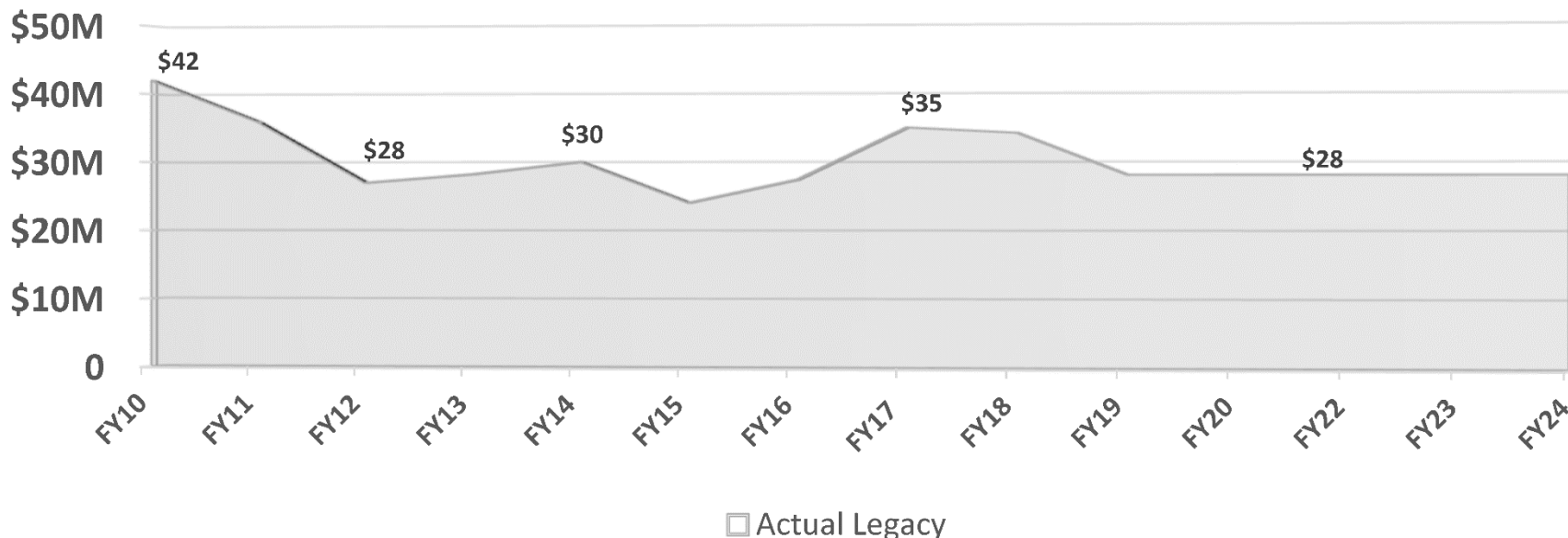
# Timeline Projections

Group – Deploy in:	# of DDSs	% Sites
Group 1 - Dec 2016	3	6%
Group 2 - March 2017	3	11%
Group 3 - June 2017	3	17%
Group 4 - Sept 2017	3	22%
Group 5 - Dec 2017	7	35%
Group 6 - March 2018	7	48%
Group 7 - June 2018	8	63%
Group 8 - Sept 2018	8	78%
Group 9 - Dec 2018	3	83%
Group 10 - March 2019	3	89%
Group 11 - June 2019	3	94%
Group 12 -Sept 2019	3	100%
Total	54	

- Deployment of DCPS is broken down into twelve groups of varying numbers of sites.
- Deployment is immediately followed by a Transition period which allows 12 months to transition.
- Groups will Retire Legacy 12 months after deploying DCPS2.
  - Caveat: the first four groups will have extended Transition periods due to the fact that they will not have the full product for the entire 12-month Transition time. We anticipate an additional 9 months to allow sufficient time for these groups to transition.

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# Legacy Cost Projections



Blue represents All Legacy Costs and the impact to the costs associated with legacy systems as DCPS is deployed according to the rollout schedule.

Red represents the total cost of DCPS2 development activities, including the ongoing Agile development after rollout to all sites.

# Recent External Oversight

- May 26, 2016 HOCR Hearing
- June 28, 2016 Demo for HWM
- July 11, 2016 FedSTAT brief for OMB & GSA
- July 14, 2016 HWM Hearing on IT Mod
- July 21, 2016 Demo for All DDS Administrators
- Aug 9, 2016 Demo for House Appropriations Committee staff
- Oct 5, 2016 Briefed HWM staff – w/ IT Mod
- Nov 9, 2016 Briefed Senate Appropriations Committee staff
- Nov 14, 2016 Briefed House Appropriations Committee staff
- Nov 15, 2016 HOCR Cyber Security testimony
- Nov 17, 2016 Briefed OMB

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# OIG Audit Reports

Congressional Response Report: Progress in Developing the Disability Case Processing System as of November 2016 ([A-14-17-50174](#)), December 2016.

Congressional Response Report: Costs Incurred in Developing the Disability Case Processing System ([A-14-16-50099](#)), September 2016.

Congressional Response Report: The Social Security Administration's Analysis of Alternatives for the Disability Case Processing System ([A-14-16-50078](#)), May 2016.

Observations and Recommendations for the Disability Case Processing System (Limited Distribution) ([A-14-15-50008](#)), May 2015.

Congressional Response Report: The Social Security Administration's Disability Case Processing System ([A-14-15-15016](#)), November 2014.

**Transition Team Member Document--Non-Public Information. This document may be disclosed to Authorized Transition Team Members only.**

# User Feedback from Early Adopter Release Demonstration, 12/6/16

- “Thrilled, excellent start.”
- “Great promise, clean interface.”
- Recognized the important milestone reached with more functionality to come
- Several members excited to take the product.
- “OMG, this looks really good!”
- Utilizes disability terms
- Intuitive
- Great user engagement including Early Adopters
- Professional looking product and lends credibility
- Definitely different than what we seen before
- Navigational tracking

**Transition Team Member Document--Non-Public Information. This document may be disclosed to Authorized Transition Team Members only.**

# DCPS Product Road Map

Last Updated: 12/2/2016

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Members only.

(b) (5)

Through Line Completed:  
3/31/2016

DCPS2 Early Adopter Release:  
12/17/2016

Sites 4 - 6:  
3/18/2017

Sites 7 - 9:  
6/24/2017

✓ PI* 0	✓ PI 1	✓ PI 2	✓ PI 3	✓ PI 4	(b) (5)	
9/30/15 – 12/1/15	12/2/15 – 1/3/16	1/4/16 – 5/10/16	5/11/16 – 8/16/16	8/17/16 - 11/29/16		
<ul style="list-style-type: none"><li>Established systems environments</li><li>Microstrategy configuration</li><li>Organizational Set Up</li><li>Created Receipt Queue with quality check</li><li>Basic case header</li></ul>	<ul style="list-style-type: none"><li>User Profiles</li><li>Introduced sub-set of dashboard categories</li><li>Manual case receipt</li><li>Manual case assignment</li><li>Template administration</li><li>Claimant Correspondence</li><li>Case Analysis: Allowance forms</li><li>Added case sub-header</li></ul>	<ul style="list-style-type: none"><li>DIB claims only</li><li>User roles &amp; tasks</li><li>Switching Dashboard Views</li><li>831 Closure form</li><li>Signatures for closure forms</li><li>Consultative Exam (CE) Request</li></ul>	<ul style="list-style-type: none"><li>Quality Check for Missing 1696</li><li>Quality Check for Missing Appointed Rep</li><li>Detect Receipt of 827, Remove Issue</li><li>Auto Case Receipt</li><li>Evidence Request Framework</li><li>CE Request</li><li>CE Scheduling Framework</li><li>Case Activity Framework</li><li>RFC Assessment</li><li>831 PDF</li><li>Print Framework</li><li>Table Filters, Sort and Find Feature</li><li>Standardization of UI Components</li></ul>	<p>Support for QDD/CAL cases</p> <ul style="list-style-type: none"><li>DI</li><li>DI/DIB Concurrent</li><li>Physical Allegations</li><li>Fully Favorable Allowances</li><li>State Isolation</li><li>Transfer to Legacy</li><li>Auditing</li><li>Security</li><li>Error Logging</li><li>Transaction Management</li><li>Evidence Requests to Medical Sources</li><li>FOFAE</li><li>Case Notes</li><li>Disability Determination Explanation PDF</li><li>Case Activity Log</li><li>Fiscal – MER</li><li>Updates After Transfer</li><li>DE Authority</li></ul>		

\* PI = Product Increment, normally consists of seven 2-week sprints (approximately one Quarter)

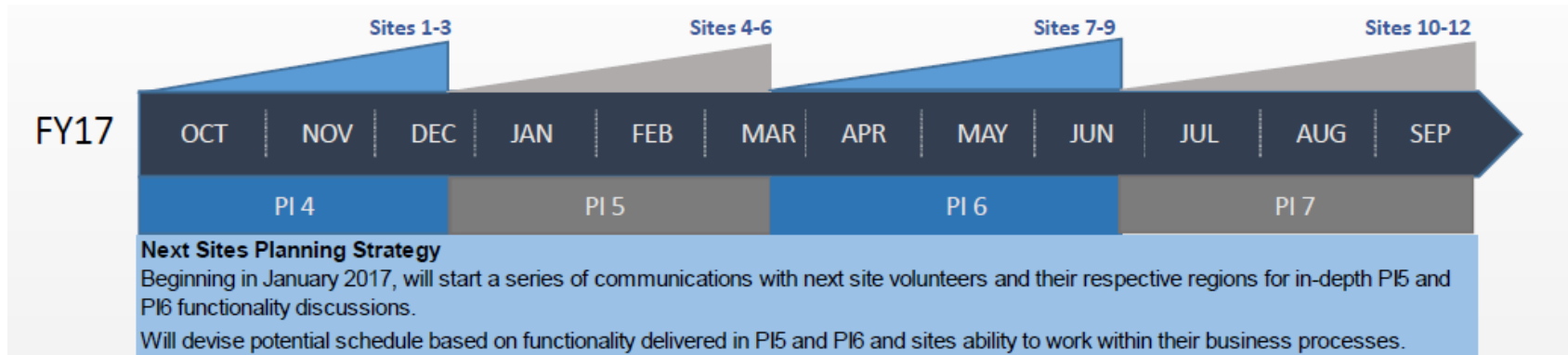
12/7/2016

DCPS | Office of the Chief Program Officer  
Completed

Committed

5  
Forecast

# FY17 Site Onboarding Timeline



## Notes/Assumptions:

- Synchronized with Product Road Map
- Ramp up with production sites:
  - Provide access to Staging (ATE) and include in testing activities,
  - Engagement over time prior to production,
  - Builds on lessons learned from EAR rollout.
- Release cycle times fit the “3-month release target”.
- Work toward shorter intervals as we progress.
- New sites go to production at the end of a PI in 2017 (i.e. 3 sites per PI).

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# ODAR CARES PLAN INITIATIVES

## BUSINESS PROCESS IMPROVEMENTS

### **Pre-hearing Initiatives**

1. NAT (Steve Nash)
2. PHC (Steve Nash)
3. SmartMands (Robbie Watts/(b) (6) )

### **Case Readiness Initiatives**

4. 1000+ Plus Page Cases (Judge Jennifer Horne)

### **General Business Process Improvements**

5. Targeted Virtual Assistance Team (Judge Nicolas LoBurgio)
6. Optimized Case Assistance Center Models and Virtual Hallway (Katrice Kendle)
7. Natural Language Processing Capabilities and Proactive Quality (Judge Gerald Ray)
8. Case Processing Unification (Judge Monica "Nikki" LaPolt)
9. Large Hearing Office Organizational Remodel (Fay Adams)
10. ODAR CARES DART Report (Debra Plunkard)
11. DeDoop ((b) (6) )

\* National FIFO

## INFORMATION TECHNOLOGY INNOVATIONS ((b) (6) )

1. ME/VE eFolder Access
2. Eliminating CD Burning
3. Reducing/Eliminating Paper Cases
4. AC iAppeals
5. ERE Uploads Without Barcodes
6. Expanding the Use of Video Hearings

## STAFFING AND FACILITIES

### **Augmentation Strategies**

1. AAJs (Judge Kelly Salzmann/Judge Gerald Ray)
2. OQR Collaboration (Judge Sherianne Laba/LaShonn Alexander)

### **Staffing**

3. ALJ Hiring (Judge Debra Bice/Judge John Allen)

### **Facilities**

4. Capacity Plan/Co-Location (Joe Lytle/(b) (6) )

## EMPLOYEE ENGAGEMENT ACTIVITIES

1. Compass Program ((b) (6) )/Tammy Farmer)
2. HOCA Pilot (Tammy Farmer/Patrick DeFalco)
3. Enhance Communication (Tammy Farmer/Patrick DeFalco)
4. Leadership Training (Tammy Farmer/Patrick DeFalco)
5. Expand Telework (Tammy Farmer/Patrick DeFalco)

## ODAR CARES PLAN INITIATIVES

CATEGORY:	Business Process Improvements – <i>Pre-hearing Triage</i>
TITLE:	National Adjudication Team (NAT)
LEAD(s):	Steve Nash; Katrice Kendle
PILOT/PERMANENT?	Pilot
STAKEHOLDERS:	AFGE, NTEU
ISSUE:	Pursuant to 20 CFR <a href="#">§404.942</a> , SSA attorney advisors have the authority to conduct prehearing proceedings and issue decisions in certain situations. OMB extends this authority to up to 7,500 fully favorable on the record (OTR) decisions annually. Because of quality concerns from past efforts with senior attorney decisions, senior attorney adjudication is under great scrutiny.
PLAN:	The NAT will screen cases and issue decisions when the evidence supports a fully favorable allowance, removing these cases from the hearings backlog. OCALJ in-line quality review staff in Region 3 reviews an appropriate number of draft OTR decisions to ensure OTR decisions are supported and legally defensible. For cases the NAT cannot adjudicate, they provide a summary of the issues of the case and work with the claimant's representative to gather evidence. This summary and more complete record will allow the ALJs to focus on the relevant issues of the claim.
TIMELINE:	<ul style="list-style-type: none"> <li>• 04/2015 - NAT began 1 year pilot:</li> <li>• 08/2015 – In-person Training</li> <li>• 10/2015 – Added support staff for senior attorneys</li> <li>• 10/2015 – Developed NAT extension strategy (Bridge NAT)</li> <li>• 04/01/2016 - Announced Bridge NAT positions (selected 59 adjudicators, 7 quality support senior attorneys, 3 LCTs).</li> <li>• 04/11/2016 – Training for 3.5 days in St. Louis</li> <li>• 04/18/2016 – 1 week of virtual training</li> <li>• 06/2016 – Began assigning cases to all NAT adjudicators, 5 of which only received cases from Puerto Rico.</li> <li>• 07/2016 – Onboarded the leader of the permanent NAT organization, Prabhydal Mundian. Began outreach and marketing efforts to remind all ALJs where to locate NAT summaries. Began gathering data on the number of development items that have been added in total to the case files for cases the NAT is not able to pay.</li> <li>• 08/2016 – Cases in Decision Writing status increased dramatically in ODAR. NAT deployed 30 attorneys to assist with overall decision writing for 8 week period.</li> <li>• 10/2016 – Transitioned NAT adjudicators back into NAT from their decision writing assignments; resumed in-line quality review of NAT draft decisions.</li> </ul>

## ODAR CARES PLAN INITIATIVES

PILOT LOGISTICS:	<p>Pilot 1 (April 2015 through April 2016):</p> <ul style="list-style-type: none"><li>• 20 Senior Attorneys Nationwide</li><li>• 3 Senior Attorney Quality Support Staff</li><li>• 1 Lead Case Technician</li><li>• 5 Senior Case Technicians (added October 2015) – Baltimore NHC</li></ul> <p>Bridge NAT (April 2016 through early 2017)</p> <ul style="list-style-type: none"><li>• 59 Senior Attorneys in the Adjudication Group</li><li>• 10 Members of the Quality and Support Group</li><li>• 2 Lead Attorneys</li></ul> <p>3 Year NAT (permanent) Early 2017</p> <ul style="list-style-type: none"><li>• staffing to be determined</li></ul>
OUTCOMES:	<p>Pilot 1 (April 2015):</p> <p>Yield: 560 OTRs and over 4684 case summaries prepared for ALJs thru 2/16</p> <p>Bridge NAT (Begin April 2016):</p> <p>July 2016 Stats: 9,160 Case Summaries prepared; 1,045 OTRs to date</p> <p>As of September 30, 2016 – Completed Close to 10,500 case summaries and adjudicated over 1,400 OTRs since April 2015.</p> <p>3 Year NAT:</p> <p>Expected Yield: TBD</p>

## ODAR CARES PLAN INITIATIVES

CATEGORY:	Business Process Improvements – <i>Pre-hearing Triage</i>
TITLE:	Pre-Hearing Conference Expansion
LEAD(s):	Steve Nash
Pilot/Permanent?	Pilot
Stakeholders:	IFPTE, AFGE, NTEU
Issue:	We currently lose 11.3% of scheduled hearings due to claimant no shows and unrepresented claimants that ask to have their hearing postponed to seek representation.
Plan:	<p>Pre-hearing conferences (PHCs) aim to assist unrepresented claimants in advance of their hearing by explaining the benefits of representation and beginning the gathering of relevant evidence to better prepare them for their hearing. Senior Attorneys will conduct the PHCs. There are three general outcomes expected from a PHC:</p> <ol style="list-style-type: none"> <li>1. The claimant obtains a representative who can assist in developing their file;</li> <li>2. The claimant does not obtain a representative. Based on discussion at the PHC, the Hearings Office begins developing the case file to ensure a more complete set of evidence and facts is available to the ALJ at the hearing;</li> <li>3. We identify that the claimant may have abandoned their claim and can schedule these claims for hearing in an efficient manner.</li> </ol>
Timeline:	<p>05/2015 - Began Phase 1 pilot.  11/2015 – Finalized Phase 2 pilot participants, training materials, trainers, and training dates.  11/2015 – Conducted PHC training with first group of Phase 2 participants.  12/2015 – Determine resources needed to develop critical functions for PHC improvements through ITIP.  01/2016 – Complete iTIP pre-launch business case.  02/2016 – Began Phase 2 Pilot expanding from five to 36 offices.  Spring 2016 - Negotiate Systems change for CPMS to improve timeliness of scheduling a PHC.  Spring 2016 – Work with each phase-2 pilot to ensure its PHC program is properly supported from a resource, policy and business process perspective.  06/2016 – Assess results of sub-pilots to determine success of centralization of PHC.  09/2016 – Begin discussions with Phase 3 PHC offices (25).  01/2017 – CPMS update to facilitate PHC MI; followed by formally expanding PHCs.  02/2017 – Data call to discuss next phase of PHC pilot offices.</p>
Pilot Logistics:	<p>Phase 1 Pilot Offices:</p> <ul style="list-style-type: none"> <li>• New York, NY</li> </ul>



## ODAR CARES PLAN INITIATIVES

	<ul style="list-style-type: none"><li>• Baltimore, MD</li><li>• New Orleans, LA</li><li>• Fort Lauderdale, FL</li><li>• Syracuse, NY</li></ul> <p>Phase 2 Pilot Offices:</p> <ul style="list-style-type: none"><li>• Baltimore, MD</li><li>• NY, NY</li><li>• New Orleans, LA</li><li>• Fort Lauderdale, FL</li><li>• Syracuse, NY</li><li>• Lawrence, MA</li><li>• Springfield, MA</li><li>• NYC Metro Area</li><li>• Richmond, VA</li><li>• Elkins Park, PA (out – 11/4/16)</li><li>• Fayetteville, NC</li><li>• Greensboro, NC</li><li>• Macon, GA</li><li>• Miami, FL (out – 11/4/16)</li><li>• Fort Myers, FL (out – 11/4/16)</li><li>• Evanston, IL (out - 11/4/16)</li><li>• San Antonio, TX</li><li>• Albuquerque, NM</li><li>• Little Rock, AR</li><li>• Dallas North, TX</li><li>• Springfield, MO</li><li>• Topeka, KS</li><li>• Wichita, KS</li><li>• Billings, MT</li><li>• Las Vegas, NV</li><li>• LA-Downtown, CA</li><li>• Region 10 (Eugene, Portland, Tacoma, and Spokane) – (out – 11/4/16)</li><li>• Falls Church, VA NHC</li></ul> <p>Phase 3 Pilot Offices:</p> <ul style="list-style-type: none"><li>• Baltimore, MD</li><li>• NY, NY</li><li>• New Orleans, LA</li><li>• Fort Lauderdale, FL</li><li>• Syracuse, NY</li></ul>
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## ODAR CARES PLAN INITIATIVES

	<ul style="list-style-type: none"> <li>• Lawrence, MA</li> <li>• Springfield, MA</li> <li>• NYC Metro Area (Bronx, Queens, Brooklyn, Jersey City)</li> <li>• Richmond, VA</li> <li>• Fayetteville, NC</li> <li>• Greensboro, NC</li> <li>• Macon, GA</li> <li>• San Antonio, TX</li> <li>• Albuquerque, NM</li> <li>• Little Rock, AR</li> <li>• Dallas North, TX</li> <li>• Springfield, MO</li> <li>• Topeka, KS</li> <li>• Wichita, KS</li> <li>• Billings, MT</li> <li>• Las Vegas, NV</li> <li>• LA-Downtown, CA</li> <li>• Falls Church, VA NHC</li> <li>• Anchorage, AK</li> <li>• Seattle, WA</li> <li>• Harrisburg, PA (Onboarding - November 2016 Update)</li> <li>• Tupelo, MS (Onboarding - November 2016 Update)</li> <li>• Memphis, TN (Onboarding - November 2016 Update)</li> <li>• Chicago, IL (Onboarding - November 2016 Update)</li> <li>• Grand Rapids, MI (Onboarding - November 2016 Update)</li> </ul>
<p>Transition Team Member Document – Non-Public Information This document may only be disclosed to authorized Transition Team members</p>	<p>Outcomes:</p> <p>June 2016 SOS Data:</p> <ul style="list-style-type: none"> <li>• 3,774 PHC Scheduled through July 19</li> <li>• 52.8 % Conducted Successfully (.8% change from June 2016)</li> <li>• 33% Did not occur because claimant did not appear (0% change from June 2016)</li> </ul> <p>July 2016 SOS Data:</p> <ul style="list-style-type: none"> <li>• 4,447 PHC Scheduled through August 22</li> <li>• 52.8 % Conducted Successfully</li> <li>• 33.6% Did not occur because claimant did not appear</li> <li>• 13.6% Other</li> </ul> <p>As of September 30, 2016:</p> <ul style="list-style-type: none"> <li>• Over 4,500 PHCs conducted since May 2015</li> <li>• 54% with PHC participation completed a successful hearing</li> <li>• 32% without PHC participation completed a successful hearing</li> </ul>

## ODAR CARES PLAN INITIATIVES

CATEGORY:	Business Process Improvements – <i>Pre-hearing Triage</i>
TITLE:	SmartMands
LEAD(s):	Robbie Watts; Donna Sasser
Pilot/Permanent?	Pilot
Stakeholders:	AFGE
Issue:	<p>Pursuant to 20 CFR <a href="#">§404.941</a>, after a hearing is requested but before it is held, we may, for the purposes of a prehearing case review, forward the case to the component of our office (including a State agency) that issued the determination being reviewed. That component will decide whether it should revise the determination based on the majority of the evidence. A revised determination may be fully or partially favorable to the beneficiary. If the component reviewing the determination cannot make a favorable determination, they must return the case to ODAR, where it returns to its spot in the queue.</p> <p>We often refer to this practice as ‘remanding’ the decision back to the organization that made the last decision to review the case for possible revision. We began using these remands to expand the use of staff in an effort to reduce the wait times for a disability determination at the hearings level.</p>
Plan:	The SmartMands initiative builds on past practices of remanding cases with a more robust and data-driven selection process. ODAR, in coordination with ORDP/ODP, ORDP/ORES, and OAO is in the process of developing several models to identify appropriate claims for remand. Once identified, ODAR will transfer the claims to two teams in DCO/OCO with the statutory adjudication authority. If the claim cannot be adjudicated without a hearing, it will be sent back to ODAR and returned to the hearing queue.
Timeline:	<ul style="list-style-type: none"> <li>- FY 2015 through 1<sup>st</sup> Quarter 2016– Develop business processes, early predictive models and case characteristics, and identify cases.</li> <li>- 11/2015 – Began sending cases (150/week) to OCO; sent 500 cases by end of November 2015.</li> <li>- 03/2016 – DC-level check in. DCO agreed to continue pilot. SmartMands group began sending 375 cases per month to OCO.</li> <li>- 08/2016 – Discussed expansion of SmartMands by 1) Continue with OCO if resources permit; 2) research current use of OC-2 report, currently available for HOs to assign cases that have SmartMands profiles; 3) Explore using SmartMands data with the NAT.</li> <li>- 09/2016 – DC-level check in. DCO will report if resources available for FY2017 SmartMands assistance from OCO.</li> <li>- 10/2016 – Number of cases per week to OCO raised to 250, with 750 claims sent during the past month. (10/25). As of October 31, 2016, 3,816 remands had been processed, with 355 remands resulting in reversals.</li> </ul>

## ODAR CARES PLAN INITIATIVES

Outcomes:	Through August 31, 2016, OCO recommended reversals on 9.2% of the more than 3,000 remands processed, of which 7.9% were fully favorable reversals and 1.3% were partly favorable.
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## ODAR CARES PLAN INITIATIVES

CATEGORY:	Business Process Improvements – <i>Case Readiness</i>
TITLE:	1,000+ Page Case Review
LEAD(s):	Jennifer Horne
Pilot/Permanent?	Pilot
Stakeholders	IFPTE, NTEU, AFGE
Issue:	<p>Administrative Law Judges (ALJs) review cases before holding hearings to identify issues and determine whether expert testimony is needed; to give instructions on further prehearing development; and to prepare questions for the hearing. These reviews can be time-consuming, especially if a case has a substantial amount of medical evidence.</p> <p>As of November 2015, the data indicates that about 4% of all cases have over 1,000 pages of medical evidence:</p> <ul style="list-style-type: none"> <li>• 968,326 pending cases nationwide as of November 3, 2015; 26,922 cases, or approximately 4%, have 1000+ pages in the F section</li> <li>• The Regional distribution of these 26,922 <i>1000+ page</i> cases is as follows: <ul style="list-style-type: none"> <li>➤ Region 1: 1,315 (<b>5.2%</b> of 25,030 total <i>1000+page</i> cases)</li> <li>➤ Region 2: 979 (<b>.9%</b> of 107,272 total <i>1000+page</i> cases)</li> <li>➤ Region 3: 3,076 (<b>2.7%</b> 112,376 total <i>1000+page</i> cases)</li> <li>➤ Region 4: 5,935 (<b>2.2%</b> 269,019 total <i>1000+page</i> cases)</li> <li>➤ Region 5: 5,173 (<b>3.5%</b> of 148,690 total <i>1000+page</i> cases)</li> <li>➤ Region 6: 2,678 (<b>3%</b> of 89,169 total <i>1000+page</i> cases)</li> <li>➤ Region 7: 754 (<b>1.8%</b> 41,256 total <i>1000+page</i> cases)</li> <li>➤ Region 8: 817 (<b>3%</b> of 26,548 total <i>1000+page</i> cases)</li> <li>➤ Region 9: 4,645 (<b>4.5%</b> of 104,152 total <i>1000+page</i> cases)</li> <li>➤ Region 10: 1,098 (<b>3.6%</b> of 30, 123 total <i>1000+page</i> cases)</li> <li>➤ NHC: 452 (<b>3.1%</b> of 14,691 total <i>1000+page</i> cases)</li> </ul> </li> </ul> <p>This pilot aims to find time savings for the case readiness. Senior Attorneys and Decision Writers will conduct a prehearing review of cases with large medical files, summarize the information and provide an analysis for the ALJ.</p>
Plan Pilot 1.0:	<p>We will pilot the initiative in the 7 offices listed below, beginning in the second quarter of Fiscal Year 2016. We will evaluate the results of this preliminary pilot to determine whether any process changes are needed for a nationwide roll-out. We will also assess a number of outcomes to determine the success of this initiative, including decreased average case review time; decreased average processing time; and decreased postponements.</p>

## ODAR CARES PLAN INITIATIVES

	<p>7 Offices in Pilot 1.0:</p> <ul style="list-style-type: none"><li>• Dayton, OH</li><li>• Fort Worth, TX</li><li>• Richmond, VA</li><li>• Baltimore, MD</li><li>• Las Vegas, NV</li><li>• Manchester, NH</li><li>• Minneapolis, MN</li></ul>
Plan Pilot 2.0	<p>The model in Pilot 2.0 changed. In this model, DWs review the case pre-hearing <i>and</i> write the draft for the case, post-hearing. Expanded pilot to 22 offices total. Pilot 2.0 is planned to run through October 2016, but initiative leads will review timeline and provide updates as resources may be affected.</p> <p>22 Offices in Pilot 2.0 (began July 1, 2016):</p> <ul style="list-style-type: none"><li>• New Haven, CT</li><li>• Hartford, CT</li><li>• Newark, NJ</li><li>• South Jersey, NJ</li><li>• Albany, NY</li><li>• Wilkes-Barre, PA</li><li>• Baltimore, MD</li><li>• Birmingham, AL</li><li>• Valparaiso, IN</li><li>• Milwaukee, WI</li><li>• Cleveland, OH</li><li>• Minneapolis, MN</li><li>• Houston-Bissonnet, TX</li><li>• San Antonio, TX</li><li>• Kansas City, MO</li><li>• Creve Coeur, MO</li><li>• Billings, MT</li><li>• Salt Lake City, UT</li><li>• Colorado Springs, CO</li><li>• Las Vegas, NV</li><li>• Fresno, CA</li><li>• Tacoma, WA</li></ul> <p>NOTE: In August, Decision Writing overall in ODAR was on the rise. It was decided</p>

## ODAR CARES PLAN INITIATIVES

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	<p>to pause on the 1,000 Plus Page initiative for eight weeks in an all-hands-on-deck approach to address the pending decision writing.</p> <p>UPDATE: Pilot "re-started" at beginning of FY 2017. A randomized case selection tool has been developed to allow for development of better objective data. Selected cases are current sent by the Program Coordinator to the Hearing Offices on a bi-weekly basis. An additional office has inquired as to joining the pilot. (Updated 10/28/16).</p>
Timeline:	<p><b>November 5, 2015:</b> Choose HOs for the pilot</p> <p><b>November 20, 2015:</b></p> <ul style="list-style-type: none"> <li>√ Circulated pilot SOP among workgroup</li> <li>√ Finalized names of SAA reviewers</li> <li>√ Contacted participant HOs to advise of pilot</li> </ul> <p><b>December 1, 2015:</b></p> <ul style="list-style-type: none"> <li>√ Finalized pilot SOP</li> <li>√ Circulated monitoring/feedback plan</li> <li>√ Circulated training plan</li> </ul> <p><b>December 18, 2015:</b></p> <ul style="list-style-type: none"> <li>√ Finalized feedback plan</li> <li>√ Finalized training plan</li> </ul> <p><b>January 6, 2016:</b></p> <p>Increase size of workgroup to include HODs, GSs from chosen HOs not needed</p> <ul style="list-style-type: none"> <li>√ Trained SAAs</li> <li>√ Trained HO staff</li> </ul> <p><b>January 11, 2016:</b></p> <ul style="list-style-type: none"> <li>√ Assigned cases to SAAs</li> </ul> <p><b>February 1, 2016:</b></p> <ul style="list-style-type: none"> <li>√ Followed up with SAAs</li> <li>√ Followed up with HOs</li> <li>√ Began data collection</li> </ul> <p><b>March 1, 2016:</b></p> <ul style="list-style-type: none"> <li>√ Follow up with SAAs</li> <li>√ Follow up with HOs</li> <li>√ Begin to analyze data</li> </ul>

# ODAR CARES PLAN INITIATIVES

## **April 1, 2016:**

- ✓ Followed up with SAAs
- ✓ Followed up with HOs
- ✓ Stopped assigning cases
- ✓ Circulated draft review and analysis of pilot 1.0

## **May 1, 2016:**

- ✓ Began analysis of pilot 1.0
- ✓ Developed project plan for pilot expansion
- ✓ Completed pilot expansion plan

## **June 1, 2016:**

- ✓ Roll out pilot 2.0
- ✓ Continue analysis of pilot 1.0

## **July 1, 2016 through September 2016:**

- ☐ Finalized data for pilot 1.0
- ☐ Continued data collection and analysis for pilot 2.0
- ☐ Developed next steps – expansion plan or national rollout?

## **October 2016:**

- ☐ Implement next steps – timeline continuation dependent upon next steps
- ☐ 10/19/2016: Began assigning cases for Pilot 2.0

## **January 2017:**

- ☐ Complete Data analysis for Pilot 1.0

## **June 2017:**

- ☐ Evaluate final data for Pilot 2.0

Outcomes for  
Pilot 1.0

Initial findings:

- Baseline task time of reviewing a 1000+page case:  
6 hours to 2 days, depending on the size of the case.
- Task-time at January 2016 evaluation of 1,000+page initiative:  
Estimate of 25% more time at the beginning of the pilot
- Amount of pages reduced due to 1000+page initiative (on average):  
17% of the cases have duplicates
- Of the 350 cases reviewed in the first pilot, we prepared dispositions for

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## ODAR CARES PLAN INITIATIVES

	<p>195. Of those 195 dispositions, we were able to adjudicate an on-the-record decision for 13.</p> <ul style="list-style-type: none"><li>• Also, we saw an average of a 16-day difference in those cases between the hearing held date and the date the decision was issued to the claimant. Claimants are getting their decisions 16 days faster!</li><li>• There were 0 cases that had to be continued with another hearing, which allows for the scheduling of more cases. Because 13 cases were able to be decided on the record, this allowed more hearing slots to open up.</li></ul>
Expected outcomes for Pilot 2.0:	<p>Increase productivity, lower APT, continue increase quality in ALJ, SAA and support staff output.</p> <ul style="list-style-type: none"><li>• Impact on productivity, both ALJ and SAA <b>TBD</b></li><li>• Impact on APT <b>TBD</b></li><li>• Impact on quality, ALJ and SAA <b>TBD</b></li><li>• Impact on support staff quality (identify pulling problems – duplicates?) <b>TBD</b></li><li>• Impact on morale, both ALJ and SAA <b>TBD</b></li></ul>

## ODAR CARES PLAN INITIATIVES

CATEGORY:	Business Process Improvements – <i>Pre-hearing Triage</i>
TITLE:	Targeted Virtual Assistance Team
LEAD(s):	Judge Nicholas LoBurgio, David Pinnt
Pilot/Permanent?	Pilot
Stakeholders:	IFPTE, NTEU, AFGE
Issue:	Hearing Offices (HO) experience short- and long-term problems with case processing. The long-term issues are addressed by assignment of cases to National Hearing Centers (NHC) and National Case Assistance Centers (NCAC) to reduce case processing time. Some HOs require quicker, more intensive assistance to address specific issues. Examples include a spike in aged cases, an extended illness of an Administrative Law Judge (ALJ), or sudden attrition.
Plan:	<p>We will develop a small team of ALJs, Attorneys, and Legal Assistants to review, schedule, develop, hear, write and issue decisions on a specific subset of cases affecting an office's performance. The team will address specific short-term problems in a designated HO over a period of 1-3 months and then move to another office. The team will also be an available resource with much shorter lead-time to handle cases previously scheduled by a HO, but who require day-to-day assistance in "covering" hearings when an ALJ is not available due to an unforeseen emergency or illness.</p> <p>We will begin with a pilot program targeting aged cases in the Denver Region to test the validity of this approach to case processing. If successful, we will roll it out on a national basis.</p>
Timeline:	<p>11/2015 3 ALJs (2 HOCALJs and 1 line ALJ) selected, 6 NCAC DWs selected 180 Region 8 cases selected.</p> <p>12/2015 Cases scheduled and reviews of cases by DWs initiated.</p> <p>02/2016 Hearings being held in person and video.</p> <p>03/2016 All hearings held.</p> <p>05/2016 All decisions drafted and signed.</p> <p>06/2016 Evaluation of pilot.</p>
Pilot Logistics:	Pilot 1 – Aged Cases – 11/2015 - Denver Region – Colorado Springs HO Hearings being held via video and in-person. DWs communicate virtually with ALJs. 180 cases selected.
Outcomes:	<p>As an average, the cases in this study were drafted and closed (from DWPC-Mail) in <b>6.9 days</b>.</p> <p>The national average (using the E21, Average Days by Status, and combining DWPC, EDIT, SIGN &amp; MAIL) is <b>33 days</b>. In the Colorado Springs HO, the average for</p>

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	<p>the same process is <b>20 days</b>.</p> <p>Lessons learned for Regions wanting to pilot a program such as the Targeted Virtual Assistance Team were provided on ODAR HQ Regional Call and with initiative leads for CARES monthly check in.</p>
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## ODAR CARES PLAN INITIATIVES

CATEGORY:	Business Process Improvements
TITLE:	Optimized Hearing Office and Case Assistance Center Models and Virtual Hallway
LEAD(s):	Katrice Kendle
Pilot/Permanent?	Pilot
Stakeholders:	IFPTE, NTEU, AFGE
Issue:	<p>ODAR opened the first National Case Assistance Centers (NCACs) in 2010. As the NCAC universe grew, the concept of a centralized case assistance center has proven itself in the hearings operation. One area of growth we see is improving efficiencies with case assignment between HOs and NCACs as well as solidifying the relationships between decision writers and administrative law judges (ALJs). Strong relationships between ALJs and writers is key to efficient case processing.</p>
Plan:	<p>We will build from our success in FY2015 where a pilot with the St. Louis NCAC and Dallas Regional Office (RO) aimed to improve communication. Specifically, relationships between the offices were established prior to participating in high volume transfers. In the pilot, we paired groups of NCAC writers with specific offices to create familiar, positive relationships virtually with the offices they were assisting. Furthermore, we used video conferencing technology to provide face-to-face availability between offices which created a more comfortable working relationship environment.</p> <p>In FY 2016 we will pair up NCACs (and Regional Case Assistance Centers (RCACs) , as needed) with a smaller universe of hearing offices and National Hearing Centers (NHCs) they assist. In addition to building these virtual teams, we will utilize technology that will encourage multiple modes of communication to facilitate a better working relationship. We refer to the improvements in modes of communication as the <b>Virtual Hallway</b>.</p>
Timeline:	<ul style="list-style-type: none"> <li>11/2015 - began testing Lync (Skype) video between Baltimore NHC and St. Louis NCAC (1 ALJ with 1 writer)</li> <li>11/2015 began partnering ALJs and writers from the 'Virtual Case Assistance Team' aged case initiative with video capability.</li> <li>12/2015-02/2016--Briefed union partners on the Virtual Hallway concept</li> <li>02/2016 – Update provided at OEM. Met with RCACs to update them and include them. Announced to regions the centralized unit partnerships and scheduled calls with respective NCAC that will provide long term assistance.</li> <li>04/2016 – OESSI and OTSO partnered to brief the unions at the April 20<sup>th</sup> forum on video and softphone technology. The briefings involved demonstrations and Q&amp;A.</li> <li>05/2016 – All NCAC offices were aligned with regions.</li> <li>Ongoing – Each month DWM will provide information regarding the status of the alignments. Once received, the regions will be notified of changes. **There have been no changes through July 2016.</li> <li>07/2016 – VH workgroup members briefed RMOs on the proposed video rollout.</li> </ul>

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	<p>Stressed that video implementation would be voluntary on the part of the employee.</p> <ul style="list-style-type: none"> <li>• 07/2016 - Calls were scheduled for those regions identified to rollout in Phase 1. There were 3 phases total, which included all NCAC, RCACs, Regions, NAT, and Falls Church; however, Falls Church may be delayed due to bandwidth issues. Since that time, it has been determined that a proof of concept will be developed following employee interest and bandwidth analysis. OESSI is working to establish a schedule to complete bandwidth analysis for all of ODAR and the solicitation of interest in Skype technology will help inform this process. 8/2016—briefed the unions at the forum on the status of Skype video proof of concept and next steps</li> <li>• 9/2016—sent a solicitation of interest to the Regions to help inform a proof of concept for future video rollout within ODAR</li> <li>• 9/2016 – Provided update at OEM</li> <li>• 9/2016 - the Richmond NCAC will be working with the Seattle region/Seattle hearing office specifically to receive training on their frequent remands. The Richmond NCAC will work on the continuity of staff who assist the Seattle hearing office as well. All Richmond staff will receive the training.</li> <li>• TBD - begin piloting soft phone technology, pending Agency rollout</li> <li>• The responses to the solicitation for the video POC came in from all of the 10 Regions and the NHC. The team will meet with OESSI on 10/25/16 to discuss next steps for developing the POC and what to communicate to the Regions and NHC as an update.</li> </ul>
Pilot Logistics:	<ol style="list-style-type: none"> <li>1. Baltimore NHC and St. Louis NCAC - video pilot 1 writer, 1 ALJ--<b>ENDED</b></li> <li>2. Virtual Case Assistance Team – Virtual Hallway tool (video capability) pilot 3 ALJs, 6 Attorneys <b>ENDED</b></li> <li>3. OESSI – Soft Phone pilot <b>TBD</b></li> </ol>
Expected Outcomes:	<p>Reduce the communication barriers, as well as identifying workload assignment efficiencies can provide a positive impact on addressing high pending within the component.</p> <p>The goal of centralized units is to provide optimal service to its internal ODAR customers in support of addressing the service delivery crisis currently experienced by ODAR claimants.</p> <p>Success will be measured by direct feedback from the offices receiving support. There are several modes to obtain feedback that range from informal emails to formal survey submissions. In addition, quality communication with prompt responses to routine inquiries may positively affect case status time, average processing time, and ultimately better and faster service to claimants.</p>

## ODAR CARES PLAN INITIATIVES

CATEGORY:	Business Process Improvements
TITLE:	Natural Language Processing
LEAD(s):	Gerald Ray
Pilot/Permanent?	Pilot
Stakeholders:	IFPTE
Issue:	At SSA, we collect massive amounts of data about our claimants as they go through the claims process. When we take a claim, our representatives are taking unstructured data from an individual or a medical source and converting the information to structured data. For example, when one of our technicians convert a medical impairment into a four-digit diagnosis code (DIG)—pneumoconiosis becomes DIG 5050—we are converting unstructured data into structured data. However, we have not yet taken real advantage of identifying many types of unstructured data and converting it to structured data for the purpose of data analytics.
Plan:	<p>Natural language processing (NLP) will allow us to extract information from our disability records by converting unstructured typewritten information into usable structured data. Computers using NLP can convert vast amounts of unstructured information quickly and consistently for our employees, allowing them to take actions on a case. Before instituting NLP, we need to work on consistency in recording our findings, as there are multiple words, abbreviations, and formats we can use to describe the same finding in the hearings operation.</p> <p>By developing an improved screening process and exploring new methods to improve our disability evaluation processes, we will be primed to use NLP on more structured data and improve our overall efficiencies for case processing. For example, we will be able to identify cases similar to the ones that were paid in the past, and from that we can run NLP to identify similar cases in the hearings backlog, thereby identifying cases that an adjudicator can likely pay without a hearing to assist with reducing the hearing backlog.</p>
Timeline:	<p>January 2015: Began developing multiple algorithms to extract the useful data from our records.</p> <p>3<sup>rd</sup> Quarter FY 2015: Began mining eCAT data sets. Ongoing activity.</p> <p>2<sup>nd</sup> Quarter FY 2016: Completed the extraction of data from the electronic case analysis tools and have written the natural language processing algorithms that identify more than 180 of the most common decision drafting issues. Actively working to integrate these algorithms into Document Generating System (DGS) so they can be run at the time decisions are prepared. Exploring how to integrate the algorithms into the Appeals Council Analysis Tool, to highlight decision drafting issues for analysts before they conduct their reviews</p> <p>3<sup>rd</sup> Quarter FY 2016: Developed clustering analysis using eCAT data in conjunction with CPMS and ARPS data.</p>

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	<p>4<sup>th</sup> Quarter FY 2016:</p> <ul style="list-style-type: none"><li>• Continued to develop NLP application.</li><li>• Finishing validation of the algorithms.</li><li>• Worked closely with OESSI to implement the use of Insight in OAO and exploring ways to roll the technology out to the hearing operation.</li></ul> <p>FY 2017 Outlook: Implement at least one test case of Insight in Hearing Office</p> <p>Nov 2016: Validation should be completed on 12/2/16. A pilot of 1 or 2 people in the hearing office is projected to begin in Jan/Feb 2017. A concurrent pilot will happen at the AC level.</p>
Challenges:	<ul style="list-style-type: none"><li>• Limited staffing for algorithm development (OAO only has one programmer who can do this)</li><li>• Time needed to properly mine the data and test the results.</li><li>• IT funding and resources</li></ul>
Pilot Logistics:	The NLP pilot will evolve as results from the initial portions are completed and evaluated. As a result, a formal pilot plan is not conducive to this initiative.
Expected Outcomes:	<p>Improved screening processes.</p> <p>Once cases are identified and worked, the case screening time will result in a 30% - 50% reduction. The exact percentage reduction will be dependent upon available resources in the hearings operation.</p>



## ODAR CARES PLAN INITIATIVES

CATEGORY:	Business Process Improvements
TITLE:	Proactive Quality
LEAD(s):	Gerald Ray
Pilot/Permanent?	Permanent
Stakeholders:	AFGE
Issue:	<p>The Appeals Council (AC) is the final stage of administrative review in the Social Security disability program. Currently, the AC conducts five types of reviews that provide the data necessary to ensure decisional quality, specifically:</p> <ul style="list-style-type: none"> <li>• Requests for review – the AC reviews and acts upon 100% of dismissals and decisions (mostly unfavorable to the claimant) which have been appealed by claimants</li> <li>• Random sample review – the AC randomly selects, reviews and acts upon between 3,500 and 7,000 unappealed decisions (mostly favorable to the claimant) and captures information about the quality of those decisions that is statistically valid from a regional perspective</li> <li>• Selective sample reviews – the AC selects, reviews and acts upon unappealed decisions (mostly unfavorable to the claimant) selected based on the likelihood of error</li> <li>• Reopenings – the AC reviews and acts upon cases referred because of potential errors that affect the effectuation of benefit payments</li> <li>• Focused reviews – the AC reviews but does not act upon cases involving issues known to be problematic in disability adjudication, or cases involving individuals who data shows are acting differently in some meaningful way than other individuals in similar cases</li> </ul>
Plan:	<p>The AC will continue to robustly administer its existing efforts, while at the same time continuing work on new and improved quality assurance methodology.</p> <p>Additionally, the AC has developed the ability to use natural language processing to identify anomalies in case processing. The AC is refining its capabilities in this regard to enable the ability to identify the 200 or so most common errors in adjudication. As this work progresses, the AC will focus more on selective sample reviews and less on focused reviews and random sampling in its quality assurance efforts. The AC has evaluated the use of selective sample reviews and determined them to be about 99.7% accurate</p>
Timeline:	<p>3<sup>rd</sup> Quarter FY 2015: The AC began using NLP for selective sample reviews. This process will be ongoing.</p> <p>June 2016 Update: OAO's Division of Quality has improved and refined its selective sampling model to the point where we can focus on particular types of cases.</p> <ul style="list-style-type: none"> <li>• Also, significant process improvements have been made that allow them to</li> </ul>



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	<p>process the same volume of work with fewer adjudicators.</p> <p><b>Selective Sampling:</b> DQ completed review of 1,163 selectively sampled cases that were identified through use of natural language processing with the assistance of ODAR's OESSI and the National Institutes of Health. This review looked at favorable hearing decisions with findings of medical equivalence at Step 3 of the sequential evaluation process.</p> <p><b>Focused Reviews:</b> In FY 2016, DQ performed 16 post-effectuation focused reviews (which do not affect awarded benefits) of 14 ALJs and 2 disability adjudication issues. (In FY 2015, DQ had performed 16 new and 5 follow-up focused reviews of 16 ALJs, 3 medical sources, and 2 disability adjudication issues.)</p> <p><b>In-line Quality Review of Analyst Recommendations:</b> In an OAO-wide program, technical assistants (TAs) reviewed the quality of analyst recommended actions, as OAO continued its review of 1% of analyst recommendations prior to disposition. These actions included RR denials, remands, dismissals, favorable and unfavorable actions, bureau protests, requests for voluntary remand, and final decisions after remand. TAs found that the recommended action was clearly not justified in 72 of the 1,503 cases or 4.79%. OAO will use data collected from the reviews to identify areas for training, clarification of procedures, and Appeals Council consistency issues. Analyst recommendations in 171 court cases were also reviewed.</p> <p><b>In-line Quality Review of Appeals Officer Actions:</b> In an OAO-wide program, a cadre of AOs completed review of 1,308 cases in their peer review program and found clear error in actions taken in 33 cases (2.25%). In 210 cases (16.06%), they found other errors requiring correction such as failure to note incorrect addresses, improper exhibiting of evidence, and failure to consider additional evidence and contentions submitted to the AC. The in-line quality review process serves to continually ensure that the AC meets its duty to provide quality service as well as policy compliant decisions.</p> <p><b>Quality Review of Administrative Appeals Judge</b>  <b>Actions:</b> In FY 2016, OAO developed a business process for examining the quality and consistency of decision-making by every AAJ. Under the process scheduled to start in FY 2017, a newly created AAJ Peer Review Panel will look at every AAJ's action in at least one closed case every month. Cases for review will fall into seven categories of one- and two-AAJ actions involving remands, dismissals, and denials of requests for review, and AC decisions. About nine AAJ volunteers will comprise the peer review panel with membership changing every six months. Reviewers will use a web-based tool developed by DITI to collect structured data about a variety of quality issues including whether the AAJ(s) action correctly concluded that the ALJ action was (or was not) supported by substantial evidence (<a href="#">OAO newsletter 9/2/16</a>).</p>
Pilot Logistics:	TBD - Will be piloted within OAO

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Expected Outcomes:	Improved quality and the ability to reduce the most common errors in adjudication. The heat maps that currently reflect the over 200 common errors will continue to be updated during the process. The intent is for this process to be a permanent part of decisional quality and not a pilot.

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CATEGORY:	Business Process Improvements
TITLE:	Case Processing Unification
LEAD:	Judge Monica LaPolt
Stakeholders	CALJ Association, ODARMA, AFGE, NTEU, IFPTE
Issue:	Hearing offices in close physical proximity will unify case processing tasks to strengthen day-to-day hearings office operations, increase case processing efficiencies and shorten the average wait time for claimants.
Pilot Plan:	In the first phase, offices will schedule hearings jointly. As the program rolls out, offices will handle master docket jointly. Ultimately, some offices may evolve to the point where they have a unified service delivery area and draw from one pool of cases for all aspects of case processing.
Pilot logistics/Business Process:	<p>The pilot will run for 90-120 days in the following offices:</p> <ul style="list-style-type: none"> <li>- Region 3 — Philadelphia and Philadelphia East ODARs <ul style="list-style-type: none"> <li>o Four employees in Region 3 are performing scheduling tasks under the Pilot, which allows two employees to handle other workloads.</li> </ul> </li> <li>- Region 7 -- Columbia will schedule for St. Louis area cases, including cases being heard in Creve Coeur ODAR, Kansas City ODAR and St. Louis ODAR <ul style="list-style-type: none"> <li>o Three to 5 employees in Region 7 will perform scheduling tasks, which allows 6-9 employees to handle other workloads.</li> </ul> </li> <li>- Region 9—Phoenix and Phoenix North ODARs <ul style="list-style-type: none"> <li>o Five employees in Region 9 will perform scheduling tasks, which allows one employee to handle other workloads.</li> </ul> </li> </ul> <p>The goal is to establish parameters for the next stage of the pilot by the end of December 2016.</p>
Timeline:	<ul style="list-style-type: none"> <li>• March 2016: Workgroup/discussions begin <ul style="list-style-type: none"> <li>o Discussions/presentations to stakeholders: local bar associations, Unions, representative groups in pilot areas.</li> </ul> </li> <li>• July 2016: Scheduling began in all 3 regions.</li> <li>• October 2016: Assess preliminary success of project; determine viability of rolling out second round of offices</li> </ul>
Expected Outcomes:	<p>The unified approach will create a more even, efficient, predictable scheduling process allowing for all hearing slots requested by judges to be scheduled. The process will allow for a higher disposition rate due to a higher number of hearings.</p> <p>Ensuring that all experts, VHRs and representatives are available for the hearings</p>

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	<p>will improve our scheduled-to-heard ratio, again increasing the number of dispositions and</p> <p>should result in using less staff for scheduling, allowing other case readiness actions to be performed.</p> <p>After the pilot has ended, we will determine if the program should continue and if we should institute the program to other offices.</p>
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## ODAR CARES PLAN INITIATIVES

CATEGORY:	Business Process Improvements
TITLE:	Large Hearing Office Organizational Remodel
LEAD(s):	Fay Adams (original lead: Judge Nicolas LoBurgio – Denver RCALJ)
Stakeholders	CALJ Association, ODARMA
Issue:	<p>The large pending caseload has necessitated the need to hire more ALJs into Hearing Offices (HOs) with the goal of having approximately 1,800 ALJs on board by 2018. However, the size of the agency’s “footprint” has not increased, therefore more ALJs and support staff are being placed in existing HOs. This results in the increase of more “super” sized HOs. The present management structure of HOs (a HO Chief ALJ [HOCALJ], a Hearing Office Director [HOD] and multiple Group Supervisors [GS]) may not be the optimum design to accomplish the mission. This is especially true when viewing the responsibilities of the non-ALJ managers, specifically the HOD. For example, more ALJs translates into more hearings, resulting in other increases: more invoices (VHR, ME, VE—all evaluated and approved by HOD); more requests for medical evidence, supplies, rep travel, and claimant travel (all bills reviewed and signed by HOD); and increased IT workloads, equipment and issues for the Hearing Office Systems Administrator, who is supervised by the HOD. A larger staff means more union involvement, personnel issues, EEO, grievances etc.</p>
Plan:	<p>We need to consider a new view of the management structure with the idea that the HOD should act as the Chief Operating Officer of the HO. We need to determine what functions a HOD must perform, whether other HO management can perform other functions currently performed by the HO , and whether an Administrative Officer-type position might be ease the burden on the HOD. A workgroup consisting of HODs of large HOs, HOCALJs, RMOs, RCALJs and OCALJ will analyze the current functions and organizational structure of the HO and, if necessary, design a new model for the large HO.</p>
Timeline:	<ul style="list-style-type: none"> <li>February 2016: identified work group members</li> <li>March 2016: first meeting held and divided members into sub-groups: RCALJs/HOCALJs/OCALJ lead: Judge LoBurgio and HODs/RMOs/OCALJ lead: Darrell Fennel</li> <li>April 2016: Fay Adams (Dallas RMO) assumed project lead role for this workgroup.</li> <li>April through September 2016: Workgroup continues to gather feedback and data regarding HOD and HO management duties to determine if/how additional management support could work. Developing proposal for Executive</li> </ul>

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	<p>consideration.</p> <ul style="list-style-type: none"><li>• August 2016: Prepared a current organizational chart and a proposed organizational chart to include assistant positions for the HOCALJ and the HOD. Developed draft proposal to prepare for OCALJ and DC/ADC briefings.</li><li>• October 2016: Workgroup will report out and provide recommendations to OCALJ and DC/ADC, including proposed position with duties and pilot locations.</li><li>• October 2016 – Position Description finalized, with OCALJ and OEOHR sign offs.</li><li>• January 2017 – Hearing Office Management Specialist Announcement tentatively planned for January pending approval. Proposal as of November 2016 is to establish the position in 50 offices, graded at 11-12.</li></ul>
Pilot Locations:	TBD
Expected Outcomes:	The goal is to create an organizational structure that enhances the ability of top HO management; allowing them to address the strategic issues facing HOs (e.g., aged cases, high pending and high APT). Expected outcome in pilot/large offices is increased efficiency in case management.

# ODAR CARES PLAN INITIATIVES

CATEGORY:	Business Process Improvements
TITLE:	ODAR CARES – New Report Category in DART
LEAD(s):	Deb Plunkard POC
Pilot/Permanent?	Permanent
Stakeholders:	ODARMA
Issue:	<p><b>Background:</b></p> <p>Various reports in the Disability Adjudication Reporting Tool (DART) have been developed in WebFOCUS and provide users with reports that can be sorted, filtered, and further refined. DART does not replace the CPMS MI reports on the CPMS menu; rather, it supplements CPMS MI to help meet ODAR's total MI needs. Currently, we have approximately 200 reports and have the following challenges:</p> <ul style="list-style-type: none"> <li>• Users may not be aware or familiar with newly created reports;</li> <li>• Current initiatives are not easily locatable in the current report's menu.</li> </ul> <p>Therefore, creating this new section for CARES should focus their attention to the reports in this category that assists them with CARES initiatives.</p>
Plan:	<p>Sample Menu:</p>  <p><b>OC1</b> - Obtainable Dispos of Cases Based on Current Status  <b>OC2</b> - CARES Screening Tool  <b>OC3</b> - Aged Milestone Reporting  <b>OC4</b> - Missing Notice of Hearing -- within 31 days of hearing date  <b>OCH</b> - CARES WebSite Hits 🔒  <b>M20</b> - Triage Report  <b>R3</b> - Pre Hearing Conference Reporting</p>
Timeline:	<ul style="list-style-type: none"> <li>• Immediate implementation once we get approval to move the changes into Production</li> <li>• No training required</li> <li>• 03/02/2016 ODAR CARES Reports developed</li> <li>• 03/15/2016 ODAR CARES Reports launched <ul style="list-style-type: none"> <li>○ OC1 Report: Obtainable Dispos of Cases Based on Current Status <ul style="list-style-type: none"> <li>▪ To identify Aged (with additional options for non-aged) cases that are ready to close (after writing statuses). Also displays the case with the oldest status days of each category.</li> </ul> </li> <li>○ OC2 Report: CARES Screening Tool</li> </ul> </li> </ul>

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	<ul style="list-style-type: none"> <li>▪ To assist in identifying Aged/Non-Aged Cases that are up to SCHD status so managers can assign to the Senior Attorneys mobilized to help get these cases reviewed and ready.</li> <li>○ OC3 Report: Aged Milestone Reporting <ul style="list-style-type: none"> <li>▪ Provides Summary and case level information relating to the OCALJ Milestones for Aged Cases. Milestones are pulling, scheduling, and unassigned writing (UNWR) and provides information on all pending Aged cases. Additional insight on potential setbacks such as jail and fraud cases are displayed as well as particular status end dates – added for guidance on why they may or may not be on the report.</li> </ul> </li> <li>○ OC4 Report: Missing Notice of Hearing – within 31 days of hearing date <ul style="list-style-type: none"> <li>▪ To identify if the Notice Sent Date is missing and the case is scheduled in 31 days. It looks at eView for fully electronic cases to determine if the notice is in the EF, as well as the waiver and reminder notices. It will also show paper cases (with a link and without) to eView where the Notice Sent Date is not in CPMS. This should provide the office an opportunity to contact the claimant, possibly send a waiver of the 20-day notice and prevent the hearing from being postponed as a no show and possibly have to be rescheduled.</li> </ul> </li> <li>• 03/29/2016: All Manager’s Call describing CARES Reports</li> </ul>
Outcomes:	<p>Provides the user community with a quick look at specific reports under the ODAR CARES section that will assist them as follows:</p> <ul style="list-style-type: none"> <li>• Low-hanging fruit by identifying the cases that can quickly be processed out for a disposition.</li> <li>• Targets users to reports that identify certain cases processes to triage cases towards closure.</li> <li>• Focuses users to target Aged Cases.</li> </ul> <p>Update August 2016:</p> <ul style="list-style-type: none"> <li>• M20 is the most popular CARES report with over 4,000 runs since March 25<sup>th</sup>. The M20 is a triage report that looks at cases that may be able to be moved (i.e., overdue development, untimely filings, scheduled past the scheduled date, etc.).</li> <li>• The OC3 report has 3,500 runs. (This report looks at our aged case milestones.)</li> <li>• The OC4 (missing notices) and OC1 (obtainable dispositions) have over 2,000 runs each.</li> <li>• The OC1 (screening report) has close to 1,000 runs.</li> </ul>



## ODAR CARES PLAN INITIATIVES

CATEGORY:	Business Process Improvements – <i>Case Readiness</i>
TITLE:	DeDooop – Software Program
LEAD(s):	Lisa Seefeldt/OESSI
Pilot/Permanent?	Pilot
Stakeholders	CALJ Association, ODARMA, IFPTE, NTEU, AFGE
Issue:	As of November 2015, the data from the 1000+ Page Case Review Pilot indicated that about 4% of all cases have over 1,000 pages of medical evidence. The pilot offices began their reviews in November and found that many of the numerous pages reviewed during the case reviews were duplicate medical reports. Duplicate medical evidence and other documentation need to be reviewed and removed/identified in accordance with policy. The removal/identification of such documentation will enable an efficient and effective review of the folder by the SAA and/or ALJ.
Plan:	DeDooop is a software solution that can scan case files, identify medical evidence that appears to be duplicative, and suggest those pieces of evidence for removal by the user. We plan to develop and pilot this software to determine if this is a viable solution to the issue of duplicative evidence.
Timeline:	<ul style="list-style-type: none"> <li>As of July 2016, DeDooop began the iTip process. A business vision has been approved and a workgroup completed the As Is and To Be documentation.</li> <li>Next steps: dependent upon IT funding.</li> </ul>
Expected Outcomes:	<p>Expected Outcomes:</p> <ul style="list-style-type: none"> <li>Increase productivity, lower APT, continue increases in quality in ALJ, SAA and support staff output.</li> <li>Amount of pages reduced due to review of duplicate documentation (on average)</li> <li>Improved Task-time evaluation of 1,000+page initiative</li> </ul>

# ODAR CARES PLAN INITIATIVES

CATEGORY:	Business Process Improvements/IT Innovations
TITLE:	National FIFO
LEAD(s):	Judge Monica LaPolt (OSUG Proposal Team: Renu Agarwal (OCALJ), Deb Plunkard (OCALJ), Andy Wernicke (LCT-LA), Doug Stults (HOCALJ-OK), Andrea Maldonado (GS-Omaha), Matt Pellum (RSA, NHC-STL), Catrina Dickson (OESSI), William Margelis (AA-Morgantown))
Stakeholders	OCALJ, OESSI, OBFS – eventually AFGE, NTEU, IFPTE with bigger vision
Issue:	<p>Hearings workloads and office staffing are distributed unevenly across the country. Some offices have more work than they can do while other offices have excess staff. While individual offices work the oldest cases assigned to their offices first, there could be older cases in the country that wait longer for decisions. Additionally, there are regional and national case assignment centers (RCACs and NCACs) that require cases be manually processed, not precise and may not necessarily meet the FIFO requirements.</p> <p>Our current process to redistribute work is tedious and manual.</p> <ul style="list-style-type: none"> <li>• The original hearing office sends a request to the regional office to ask for assistance.</li> <li>• The regional office has to canvas the region in search of a hearing office that can accept the workload.</li> <li>• Once an assisting hearing office is determined, the cases need to be updated to a specific status in order for them to be sent to the assisting office.</li> <li>• The assisting office then has to perform status updates to “receipt in” those cases.</li> <li>• The hearing office management then individually, or batch, assigns those cases to their own employees.</li> <li>• Once the employees complete their tasks, the assisting office then has to perform further status updates in order to send the cases back to the owning office.</li> <li>• The original office then has to receipt the cases back in and assign it to the next person.</li> </ul> <p>At a minimum, it takes one day to send the original request to the region, two days for the region to locate available resources and several more days to transfer the cases. The delay is multiplied each time a task is sent to another office (e.g., pulling and writing). In this age of electronic folders and digital processing, there must be a better way to redistribute work.</p>

## ODAR CARES PLAN INITIATIVES

Plan:	<p>We will develop an iTip proposal to develop software to control and assign case processing tasks automatically to available workers across the country based on the age of the case.</p> <ul style="list-style-type: none"><li>• All tasks (e.g. screening, workup, holding the hearing, writing, mail) will be controlled on a national level.</li><li>• When a worker has finished one task, they will automatically receive the next available case, regardless of HO jurisdiction.</li><li>• Tasks will be assigned in order – priority cases (TERI, QDD, Congressional) will be assigned first, followed by those cases with the oldest hearing request date.</li><li>• Management will be able to set maximum assignments and manage their employees' workload accordingly.</li><li>• Individual cases will be able to be put back into the "pool" or original office if the office/individual is unable to process (i.e, ALJ instructions are not in Eview).</li><li>• The system will contain parameters (e.g., judicial circuit, video opt out, paper, etc.) to narrow the assignment of selected tasks.</li></ul> <p>By breaking the work into tasks, the next available resource can complete the next task on the case. With this national case distribution plan, cases will be processed first in, first out on a NATIONAL basis. Making it such that there will no longer be cases waiting for a task such as workup for over a year or more in one office and only 60 days in another. Mailing of cases could conceivably be completed on the west coast if entered on the east coast at the end of their day and would be processed more timely.</p> <p>The National FIFO vision will be folded into the overall ODAR Hearings Operation Case Processing product vision being developed by OESSI.</p>
Timeline:	<ul style="list-style-type: none"><li>• April 2016 – Select project lead and workgroup members</li><li>• April 2016 – September 2016 - Develop business case (to include business process, alternatives analysis, costs, benefits and timelines)</li><li>• September 2016 – Finalize 'to be' process, prepare for Exec review and iTIP vision</li></ul>
Pilot Locations:	<p>11/30/2016 - A potential scenario for National FIFO pilot has been identified in Region 10. Further development of the proposed business process is needed before the pilot will commence.</p>

## ODAR CARES PLAN INITIATIVES

Outcomes:	<ul style="list-style-type: none"><li>• Balanced workloads</li><li>• Reduced case processing time</li><li>• Reduced aged cases</li><li>• Consistent National case processing</li></ul>
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## ODAR CARES PLAN INITIATIVES

CATEGORY:	Information Technology Innovation
TITLE:	ME/VE Access
LEAD(s):	(b) (6) /Lisa Seefeldt---POC Magan Mohrmann
Pilot/Permanent?	Pilot
Stakeholders:	IFPTE, AFGE, NTEU
Issue:	<p>ODAR adjudicates claims for individuals who have filed a request for hearing before an Administrative Law Judge (ALJ). ALJs may request that an expert provide medical or vocational expert testimony as a part of the process.</p> <p>When a hearings office (HO) contracts with a medical or vocational expert, HO staff burn the appropriate eFolder exhibits to an encrypted CD. We typically mail the CD to the expert. If new evidence is added to the eFolder prior to the hearing, we burn an updated CD and send that to the expert. The expert uses the CD to prepare for the hearing. Each year ODAR burns hundreds of thousands of CDs for Medical Experts (ME) and Vocational Experts (VE). We provide a workstation in every hearing room so that the expert can view the appropriate exhibits from the CD during the hearing.</p>
Plan:	<p>We envision a process where MEs and VEs will be able to access evidence from the claimant's eFolder electronically over the Internet. All of our experts will register for a mySocialSecurity account and be authenticated at the highest security level. ODAR will store the expert's account key or SSN in our CPMS expert table.</p> <p>The expert will bring his/her own laptop to the hearing and log into the secure website to view the applicable evidence during the hearing. Systems is currently developing the software. The Blanket Purchase Agreements (BPAs) are being modified to require the experts to register, view background evidence over the internet and bring their laptops to the hearing. We are working with OIS to provide wireless access (Wi Fi) in hearings rooms so that the experts will be able to access the internet. It will take some time to wire all hearings offices for wifi, so experts will need to download the folder onto their laptop before the hearing. We will still need to burn CDs for new exhibits and for "emergency" requests for experts on the day of the hearing.</p>
Timeline:	<p>Wi-Fi in Hearing Offices</p> <ul style="list-style-type: none"> <li>• Gain stakeholder buy in at International Association of Rehabilitation Professionals conference 10/23/15</li> <li>• Met with OIS to discuss wireless – 10/19/15.</li> <li>• Identify wireless pilot sites – 12/15</li> <li>• Request funding for wireless pilots – 01/16</li> <li>• Completed pilot site survey – 2/24</li> <li>• Prepare training materials – TBD – pending infrastructure work</li> </ul>

## ODAR CARES PLAN INITIATIVES

	<ul style="list-style-type: none"> <li>• Register pilot participants – TBD – pending infrastructure work</li> <li>• Train and implement – TBD – pending infrastructure work</li> <li>• Expand to additional pilot sites – TBD – pending infrastructure work</li> <li>• Release 2 – TBD – pending infrastructure work</li> <li>• Full implementation – TBD – pending infrastructure work</li> </ul> <p>ME/ VE Access to eFolders (Release 1)</p> <ul style="list-style-type: none"> <li>• UAT testing with ME/ VEs (8) 2/28-3/11</li> <li>• ARA held and executive summary approved; eGSC 3/1/16</li> <li>• Finalize User Guides during UAT</li> </ul> <p>ME/VE Access to eFolders (Release 2)</p> <ul style="list-style-type: none"> <li>• UXG testing complete; recommendations pending</li> <li>• UXG compensation requests to RO contacts</li> <li>• BPD exec agreement over RQID feature; defer for ME/ VEs</li> <li>• Review Use Cases and finalize requirements</li> <li>• Begin drafting User Guides</li> </ul> <p>Update 8/8/16:</p> <ul style="list-style-type: none"> <li>• Began rollout of ME/VE access late April 2016.</li> <li>• Through November 2016, 20 experts (2 per region) each month will be invited to participate in the pilot.</li> <li>• National release scheduled for December 2016 – There are approximately 1400 ME/VEs nationwide who will receive information in December that they are eligible to register for electronic folder access.</li> <li>• After the December release, experts will be encouraged to register and use eFolder access for their claims.</li> <li>• In an effort to facilitate an expedited and smooth rollout, we may consider requiring ME/VEs register for a mySocialSecurity account.</li> </ul> <p>Update 9/13/16:</p> <ul style="list-style-type: none"> <li>• As of September 9, 2016, 37 experts were enrolled.</li> </ul> <p>Update 10/28/16:</p> <ul style="list-style-type: none"> <li>• January 2017 – Begin national implementation of ME/VE access.</li> <li>• End of FY 2017 – Stop burning CDs for ME/VEs.</li> </ul>
Pilot Logistics:	<p>Wi-Fi in Hearing Offices</p> <ul style="list-style-type: none"> <li>• Wireless access will have to be provided in hearing room pilot sites</li> </ul> <p>ME/ VE Access to eFolders (Release 1)</p> <ul style="list-style-type: none"> <li>• Pilot group will be solicited from among UXG/ UAT testers</li> <li>• We will couple April 30 pilot of software with Wi-Fi testing</li> </ul>
Outcomes:	Wi-Fi in Hearing Offices

## ODAR CARES PLAN INITIATIVES

	<ul style="list-style-type: none"><li>• The new process will save approximately 58 WYs, the cost of CDs, packing materials and postage as well as the cost of the extra workstation in every hearings room.</li></ul> ME/ VE Access to eFolders (Release 1) <ul style="list-style-type: none"><li>• Successful implementation will result in cost savings of over \$5.6 million/year and a time savings of 55.37 WYs</li></ul>
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## ODAR CARES PLAN INITIATIVES

CATEGORY:	Information Technology Innovation
TITLE:	Reduce CD Burning in Hearings Offices
LEAD(s):	(b) (6) ; POC: Magan Mohrmann
Pilot/Permanent?	Permanent
UNION(s):	AFGE, NTEU, IFPTE
Issue:	<p>ODAR burns millions of CDs for representatives at a cost of over 2 million dollars per year (i.e., ~20 work years (WY) plus supplies). Since 2009, ODAR has registered more than 13,000 individual appointed representatives to allow representatives to view their claimants' electronic folders (eFolders) securely over the internet. These 13,000 representatives are associated with 90% of the appeals with representatives pending in ODAR. However, despite having access to their claimants' eFolders, some appointed representatives continue to request CDs from hearing office (HO) staff and a number of them never even registered for the eFolder access. For example, there are currently 3,553 representatives in CPMS, associated with 2% of the pending workload, who never registered for Appointed Representative Services (ARS). This number probably represents owners of firms and not all of the attorneys who work for them. We anticipate that we may need to register <b>up to 10,000 representatives</b> with publication of the Federal Register Notice (FRN) discussed below.</p>
Plan:	There are multiple options which are either long-range or would create more work for the hearing offices. The most expeditious and lowest cost option is to mandate that reps who receive direct fee payment use the eFolder.
Timeline:	<ul style="list-style-type: none"> <li>• FRN <ul style="list-style-type: none"> <li>○ Draft comprehensive FRN mandating that all direct fee representatives must use the eFolder – 11/25/15</li> <li>○ Receive OGC comments on draft – 12/11/15</li> <li>○ Send FRN to OR for official review – 1/18/16</li> <li>○ Receive final FRN and ACOSS memo – 2/17/16</li> <li>○ Proposed publication date – 3/21/2016</li> <li>○ Registration grace period for HO in-person enrollment –120 days following publication</li> <li>○ Non-substantive changes made to FRN by Deputy Commissioner - 3/15/2016</li> <li>○ FRN pulled back from OFR – 3/15/2016</li> <li>○ Send FRN to ACOSS for signature – week of 3/21/2015</li> <li>○ FRN to OR for return to OFR for new publication date – week of 3/28/2016</li> <li>○ FRN published -- 4/18/16</li> <li>○ FRN effective -- 8/16/16</li> </ul> </li> <li>• HALLEX <ul style="list-style-type: none"> <li>○ Updated HALLEX out for all component review – 2/1/16</li> <li>○ HALLEX review due – 2/19/16</li> <li>○ Published HALLEX – week of FRN publication</li> <li>○ Reviewed updated FRN for possible HALLEX updates – week of 3/21/2016</li> </ul> </li> <li>• eBP <ul style="list-style-type: none"> <li>○ Developed new business process– 1/25/16</li> <li>○ eBP updates – 2/19/16</li> </ul> </li> </ul>



## ODAR CARES PLAN INITIATIVES

	<ul style="list-style-type: none"> <li>○ Published eBP updates – close to effective date (July 2016)</li> <li>● Notices <ul style="list-style-type: none"> <li>○ Drafted notice (HA-L32) changes – 2/8/16</li> <li>○ Requested DGS changes – 2/8/16</li> <li>○ Implement DGS changes – October 2016</li> <li>○ Prepared Dear Colleague letter for distribution in lieu of HA-L32 changes- 3/7/2016</li> <li>○ Mailing list and hard copy to OCALJ for central print mass mailing – 3/14/2016</li> </ul> </li> <li>● Communications - external <ul style="list-style-type: none"> <li>○ Developed Communications plan – 2/1/16</li> <li>○ Submitted OCOMM video request – 2/8/16</li> <li>○ Requested ssa.gov ARS webpage updates – 2/15/16</li> <li>○ Drafted flyer for reps – 2/15/16</li> <li>○ Executive review of Dear Colleague letter – 2/22/16</li> <li>○ Call with NOSSCR leadership – 3/15/16</li> <li>○ Brief at NADR conference – 3/15/2016</li> <li>○ Sent Dear Colleague letters electronically– week of publication</li> <li>○ Updated Internet ARS pages – week of publication</li> <li>○ Posted OCOMM video – early April 2016</li> </ul> </li> <li>● Training &amp; Communications – internal <ul style="list-style-type: none"> <li>○ Requested OCO refresher training – 2/8/16</li> <li>○ Brief RO ARS workgroup – 2/22/16</li> <li>○ Brief unions via OCALJ– 3/15/2016</li> <li>○ Brief All ODAR Managers – 3/15/2016</li> <li>○ Updated ARS training materials – 3/18/2016</li> <li>○ Delivered OCO &amp; RO/HO refresher training – prior to publication</li> </ul> </li> <li>● Registration <ul style="list-style-type: none"> <li>○ External event – NADR conference in Atlanta 3/13-3/16 ; NOSSCR conference in Miami 6/1/16-6/4/16</li> <li>○ HO registration – publication date thru effective date</li> <li>○ As of 8/27/2016, 775 representatives enrolled (including Charles Binder) – equivalent to 95% of cases pending with representatives. The remaining 5% of represented cases have reps that do not have ARS access. Approximately 2% are “friends and family members”.</li> </ul> </li> </ul>
Outcomes:	We will save substantial money and staff time by requiring representatives to download their claimants’ folders themselves, rather than asking ODAR staff to perform this service for them.

## ODAR CARES PLAN INITIATIVES

CATEGORY:	Information Technology Innovations
TITLE:	Eliminating Paper Folder Exceptions (Maintaining the Electronic Folder)
LEAD(s):	(b) (6) —POC Jamye Pritchett, Don Nguyen
Stakeholders:	AFGE/IFPTE/NTEU
Pilot/Permanent?	Permanent
Issue:	ODAR receives a volume of requests for hearing on electronic folders that are transferred by the field office to the hearing level where one portion of the electronic record on a concurrent case is missing. If the missing portion is not associated within a defined period, the file must be converted to paper.
Plan:	<p>We plan to make a series of incremental enhancements to our Information Technology systems to automate numerous exclusions, thus eliminating some of the primary exceptions to maintaining the electronic folder.</p> <p>Additionally, we will work with DCO and DCRDP to update our current policies and procedures to stop printing entire electronic folders when one claim becomes exclusion.</p>
Timeline:	<ul style="list-style-type: none"> <li>• <b>EDCS Edit</b> – In July 2015, we added an edit to EDCS to prompt the FO to transfer both portions of a concurrent case at the same time. This edit saves valuable time for our hearing office staff.</li> <li>• <b>T16 Exclusions</b> – On December 12, 2015, we provided the ability to maintain electronic processing in some scenarios for both claims of a concurrent case when one claim (T16 is paper). Training was delivered via VOD. The release was instantly popular with users (hundreds of cases were kept electronic within the first week of implementation).</li> <li>• <b>Remaining T16 Exclusions</b> – On June 18, 2016, we expanded the functionality and reach of the December 2015 release. Field Offices can now add any T16 claim/appeal to a concurrent appeal. This release captures a significant bucket of the remaining exclusions including, Stand Alone Title 16 claims/appeals. A collaborative team (ODAR, Operations, and Policy) created and delivered training via VOD. <ul style="list-style-type: none"> <li>○ The June 2016 systems were successfully implemented into production. This release captured a significant bucket of the remaining exclusions including Stand Alone T16 claims/appeals.</li> </ul> </li> <li>• <b>Policy changes</b> – A multicomponent workgroup is underway to recommend modifying existing policy to allow for electronic processing of concurrent claims and dual entitlement cases that share the same medical evidence. This will significantly reduce the number of cases that must be converted to paper.</li> </ul>

## ODAR CARES PLAN INITIATIVES

	<ul style="list-style-type: none"><li>• <b>Automating queries in eView</b> – In FY 16, hearing office staff will be able to launch the most frequently used mainframe queries directly from QueryMaster so that they can be automatically uploaded to the electronic folder. (June 2016) Issue new policies and procedures to maintain electronic processing and stop printing entire electronic folders if one claim becomes an exclusion. (June 2016)</li></ul> <p>08/2016:</p> <ul style="list-style-type: none"><li>• User Acceptance Testing (UAT) was successfully completed.</li><li>• Training was delivered via VOD as part of a collaborative effort with DCO, policy, and systems.</li><li>• A new workgroup is looking into making changes to EDCS/eView to allow multiple pending cases to be worked electronically.</li></ul> <p>TBD: Work with OCALJ on updating eBP and finalize.</p> <p><b>FY 17 Automation Enhancements (Strategy)</b> – Identify and implement efforts to capture remaining buckets of exclusions electronically. TBD: long term goal - The agency is committed to find a solution for the remaining electronic processing solution. This effort utilizes iTIP and includes the remaining buckets of exclusions:</p> <ul style="list-style-type: none"><li>• Multiple pending</li><li>• Non-dib/non-medical</li><li>• Expedited reinstatements</li><li>• Res Judicata, and SGA scenarios</li></ul>
Outcomes:	We anticipate that the FY 16 releases will prevent up to 10,000 cases from turning into paper. We estimate that automating queries in eView will save up to 7 minutes per case.

## ODAR CARES PLAN INITIATIVES

CATEGORY:	Information Technology Innovation
TITLE:	iAppeals for the Appeals Council
LEAD(s):	DCO = Agency Lead; (b) (6) /OESSI = ODAR Lead
Pilot/Permanent?	Permanent
Stakeholders:	
Issue:	<p>SSA hosts an internet service to allow claimants, their appointed representatives, and third parties to file appeals online. The current software supports appeals of disability determinations through the ALJ level. The software does not support non-medical appeals or Appeals Council level appeals. Both of these workloads are extremely labor intensive and paper bound. Two iAppeals projects were submitted through the SITAR process for FY 16. One would allow the public to file non-medical appeals over the internet; the other would allow the public to file Appeals Council (AC) appeals over the internet. DCS convened a meeting in late August to discuss SITAR priorities with ORDP, DCO and ODAR. The group discussed the two iAppeals proposals. Everyone agreed that the non-medical project would have the greatest impact so should be completed first. ODAR proposed that if OAO could use the same front end as non-medical appeals, we would merge the two projects.</p> <p>As a result, ODAR made a few minor tweaks to DCO's iAppeals business process description (BPD). We circulated the revised BPD to all affected components and on 11/27/15 received component concurrence to combine the Planning and Analysis effort for non-disability iAppeals with OAO iAppeals, with the understanding that non-dib is the priority and must be implemented by 12/16.</p>
Plan:	<p>The project will make minimal modifications to non-dib iAppeals and dib iAppeals to allow reps/claimants/third parties to submit iAppeals over the internet, attach evidence via the attachment utility, and route the appeal to OAO.</p> <p>We will continue to work with DCO through the Planning and Analysis (P&amp;A) phase. At the end of P &amp; A, DCS will provide an estimated timeline and resource requirements to incorporate OAO requirements into the project.</p>
Timeline:	<ul style="list-style-type: none"> <li>• 11/2015 - Received component concurrence on the OAO iAppeals minimal BPD and to combine the P&amp;A effort with non-dib</li> <li>• 01/2016 - Began P&amp;A meetings</li> <li>• TBD: Complete P&amp;A</li> <li>• TBD: Receive estimate on resource impact and timeline for OAO iAppeals</li> </ul>

## ODAR CARES PLAN INITIATIVES

Pilot Logistics:	Allowing claimants and representative to file AC level appeals online is consistent with the Critical 8 element of Enhancing Online Customer Service. The workload will be more manageable and will allow OAO to better serve the public.
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## ODAR CARES PLAN INITIATIVES

TITLE:	ERE Uploads without Barcodes (Allow users with access to eFolder to upload documents without a barcode)
LEAD(s):	(b) (6) POC: Magan Mohrmann
Pilot/Permanent?	Permanent
UNION(s):	AFGE, NTEU, IFPTE
Issue:	<p>Currently, we send appointed representatives a barcode to fax or upload documents to the electronic folder.</p> <ul style="list-style-type: none"> <li>• The barcode links the document to the correct case; but it contains a “generic” document type (representative supplied evidence) with the representative’s name as the source of the document.</li> <li>• When the representative uploads the document, they key the 16 digit “document id” from the barcode. This is extremely error prone. If the representative miskeys the number, HO staff must manually locate the document in an “orphan” queue and associate it with the correct case.</li> <li>• When HO staff pulls the case, they re-index the documents with the correct document type and the actual source of the evidence.</li> </ul> <p>The current process is labor intensive and error prone.</p> <p>When appointed representatives, or experts, access an electronic case, SSA knows which case they opened. It should be possible to automate the process of associating the document with the correct case, without requiring the issuance or keying numbers in barcodes. We could ask the representative to select the appropriate document type and key the appropriate source name.</p> <p>Because of the importance of the CARES initiatives to reduce the number of people waiting for a hearing, the Office of Systems agreed to work with ODAR to modify ERE and ARS in the 12/16 release to allow registered eFolder users to upload documents into the eFolder without using a barcode/request id.</p>
Plan:	Work with the Office of Systems to automate the process.
Timeline:	<p>02/17/2016 - Negotiated with systems to implement the functionality</p> <p>04/22/2016 - Completed planning and analysis</p> <p>12/2016 - Implement the software for ARS</p> <p>TBD - Implement the software for ME/VE access</p>
Outcomes:	Save ODAR approximately 11 WYs/year.

## ODAR CARES PLAN INITIATIVES

CATEGORY:	Information Technology Innovation
TITLE:	Expanding Video Hearings
LEAD(s):	Lisa Seefeldt and Wendi Gibson
Pilot/Permanent?	Permanent
Stakeholders:	IFPTE, NTEU, AFGE, Appointed Representatives, Claimants
Issue:	<p>Video hearings play a critical role in SSA's disability adjudication process, and require strong and sustained investment beyond equipment replacement. Video is a key component of ODAR's ability to manage the disability hearings workload and enable us to hold hearings when participants are in various locations. Since 2004, ODAR has held over 1.25 million hearings via video. Today, more than one out of every four hearings is by video.</p> <p>Video provides claimants the option of participating in a hearing more conveniently located to where they live. Additionally, it allows us to move work from overloaded offices to those with hearings capacity and broadens the pool of experts available for expert testimony. We hold video hearings in hearing offices (HO), permanent remote sites (PRS), claimant only video sites (COV), and National Hearing Centers (NHC). Claimants may also attend a hearing via a certified Representative Video Project (RVP) site.*</p> <p>*Note: in addition to these agency sites, claimants also attend video hearings at jails/prisons, State video networks, and Alaska Owl sites.</p>
Plan:	<p>We plan to work in conjunction with OSOHE and OBFS to refresh aging equipment and increase availability of Judge only Video (JOV). In addition to this, OESSI is working with the Office of Systems to accelerate a bandwidth analysis and possible bandwidth upgrades.</p> <p>We will also continue to work with OSOHE to establish connections to jails/prisons.</p> <p>The Agency Video Service Delivery Workgroups Project Scope Management Agreement (PSMA) is now completed. It consists of 5 distinct efforts that will make video usage much easier and more readily available.</p> <ul style="list-style-type: none"> <li>• Enterprise Bandwidth Demand Analysis: assess and confirm bandwidth requirements in order to document required network upgrades.</li> <li>• Improve Video Usability / Architecture Enhancements: improve usability of VTC resources while implementing architecture enhancements including making significant changes to the existing video architecture while also incorporating new processes and tools for improved usability.</li> <li>• Improve Availability &amp; Accuracy of VTC Inventory/Asset Management Capabilities: improve business processes and technical capabilities for improved accuracy and completeness of agency video inventory data.</li> <li>• Improve Availability &amp; Accuracy of VTC Reporting Capabilities: improve</li> </ul>

## ODAR CARES PLAN INITIATIVES

	<p>business processes and technical capabilities for improved availability and accuracy of agency video reporting data.</p> <ul style="list-style-type: none"><li>• Explore Enterprise Scheduling Options: reserve/schedule cross-component video resources including shared services rooms</li></ul>
Timeline:	<ul style="list-style-type: none"><li>• OSOHE plans to refresh existing video equipment on a 5-year schedule. The oldest generation was replaced in 2016.</li><li>• Refreshment of 394 HDX 9001/9002 video units began January 4, 2016 with 393 completed to date. This refreshment was completed by the end of FY 2016.</li><li>• In FY 2017, OSOHE plans to refresh 218 HDX 9006 video units.</li></ul>
Outcomes:	Increase video availability and stay up-to-date with video equipment.



## ODAR CARES PLAN INITIATIVES

Category:	Staffing and Facilities
TITLE:	Adjudication Augmentation Strategy
LEAD(s):	Pat Jonas/Gerald Ray/Kelly Salzmann
Stakeholders:	AFGE and IFPTE
Pilot/Permanent?	We consider this a temporary strategy to address the backlog of hearings pending rather than a pilot.
Issue:	We are facing an unprecedented service crisis with over one million people waiting for an answer on their claims that are pending at the hearing level of our administrative review process. We attribute much of the growing wait times and number of pending hearings to a combination of inadequate funding and a lack of qualified ALJ candidates on the Office of Personnel Management register.
Plan:	<p>In an effort to address this crisis, we have decided to utilize some of the flexibilities offered by the Appeals Council (AC) to assist with the requests for hearing currently pending as well as to limit the number of cases remanded back to the hearing level allowing for focused processing on initial requests for hearing. We are able to hire AC Administrative Appeals Judges (AAJ) directly without OPM involvement. With the temporary assistance of AAJs, we would be able to divert resources to the AC and more quickly hire AAJs and the necessary support staff .</p> <p>This Adjudication Augmentation Strategy will utilize existing regulatory authority for the AC's AAJs to hold hearings in subsets of cases that would otherwise require a hearing before an Administrative Law Judge (ALJ). In an effort to ensure the success of this initiative, we will begin with a measured approach to a specific category of cases.</p> <p>The first group of cases where we will use the AC to hold hearings would be non-disability cases with a pending hearing request. As of the end of the first quarter of FY 2016, the hearing level had just over 10,000 non-disability cases pending a hearing decision. Using the authority in 20 CFR 404.956 and 416.1456, the AC would remove the request for hearing in these cases, hold the hearing, and issue the decision. While all ALJs share the responsibility for handling non-disability cases, the AC has AAJs who only handle non-disability appeals. Because ALJs do not commonly adjudicate these types of cases, the AC has historically had a higher rate of granting review– between 35 and 38% in FYs 2013 - 2015.</p> <p>The second group of cases where the AC will assist the hearings-level consists of two categories of cases: 1)those cases in which the Appeals Council intends to remand the case back to an ALJ; and, 2) cases remanded by a United States District Court. We expect these workloads to result in about 30,000 cases a year. Using the authority to obtain additional evidence and issue a decision under 20 CFR <a href="#">404.976(b)</a>, <a href="#">416.1476(b)</a>, <a href="#">404.979</a> and <a href="#">416.1479</a>, instead of remanding the case to an ALJ for a supplemental hearing, the Appeals Council would hold the supplemental hearing, obtain necessary evidence, including medical and vocational expert evidence, and issue a final decision on behalf of the Commissioner. If the AC handles this set of cases instead of remanding them back to an ALJ, it will provide faster decisions to claimants who have waited the longest for a final decision from the agency, and it will keep these cases from adding to the number of</p>

## ODAR CARES PLAN INITIATIVES

	<p>pending hearings.</p> <p>The AC may not be able to hold supplemental hearings in all types of cases. Examples of types of cases that would be excluded are remands for lost folders and hearing recordings and where a United States District Court expressly orders that the case be remanded to an ALJ.</p>
Timeline:	<p>Original Timeline:</p> <p>Q3 FY 2016: Begin holding non-disability hearings</p> <p>Q3 FY 2017: Begin holding supplemental hearings as the result of AC and court remands</p> <p>02/2016: Posted AAJ and support staff positions to USA Jobs</p> <p>05/2016: Hearing on use of AAJs for hearings with Committee on Homeland Security and Government Affairs (Regulatory and Federal Management Subcommittee)</p> <p>08/2016 update: Due to recent budget constraints, ODAR does not have the resources to implement the AAS as originally envisioned.</p>
Outcomes:	<p>Depending on the numbers of supplemental hearings held by the AC, the potential impact is to prevent 30,000 cases from being remanded to the hearing level and to relieve the hearing level from having to process 10,000 non-dib cases.</p>

# ODAR CARES PLAN INITIATIVES

CATEGORY:	Staffing and Facilities
TITLE:	Collaboration Plan for Office of Quality Review (OQR) and ODAR
LEAD(s):	Sherianne Laba and LaShonn Alexander
Pilot/Permanent?	Pilot
Stakeholders:	AFGE/NTEU/ IFPTE
Issue:	In an effort to assist ODAR with reducing pending cases, OQR will share resources on initiatives that will utilize personnel most effectively in addressing the growing number of hearings pending. OQR will remission staff for ODAR activities for this collaborative effort.
Plan:	<p>The workloads and initiatives for which OQR will provide resources include:</p> <ol style="list-style-type: none"> <li>1. Enhanced Dismissal Writing Unit— OQR reviewers will prepare notices of dismissals for Administrative Law Judges (ALJs) based on instructions provided by ALJs.</li> <li>2. Non-Disability (Non-DIB) Analytical Unit—OQR reviewers will assist ALJs by preparing an analytical case summary for the file after work-up and adding additional documents necessary for the ALJ's decision.</li> <li>3. Disability (DIB) Aged Case Analytical Unit---OQR reviewers will assist the ALJ by preparing a case summary for the file after work-up and adding additional documentation.</li> <li>4. Electronic Folder Transaction/"TO DO" Unit---OQR administrative and clerical personnel will assist SCTs and CTs with To-Do items which will allow ODAR staff to spend time on case development and pulling.</li> <li>5. Unrepresented Claimant Case Preparation and Analysis Unit—Identify cases early in the process where the claimant cannot be located. Take necessary action to dismiss and/or further develop the case.</li> <li>6. Smartmands Project—Conduct second-level quality review of 400 informal remands not allowed by OCO.</li> </ol>
Timeline:	<ul style="list-style-type: none"> <li>• 12/15/15 through 12/21/15 - AFGE Discussions</li> <li>• 01/07/16 - OQR Solicitations for Details released by open until 1/15/16</li> <li>• 1/25/16 - OQR Selections made the week of;</li> <li>• 2/1/16- ODAR/OQR deliver training during the week;</li> <li>• 2/8/16 - Targeting to be fully operational.</li> <li>• 2/2016 Training completed for Aged Case Analysis, Dismissal and unrepresented claimant training complete</li> <li>• 3/2016 OQR staff will begin dismissal writing</li> <li>• 3/2016 solicitations for GS 7 temp promotion (3/14 open for 2 weeks)</li> <li>• 4/2016 – Selections for GS7/8 promotional opportunity have been made.</li> <li>• 11/2016- There will be a short term collaboration for FY 17 that involves four offices (2 in region 2 and 2 in region 3). They will analyze aged cases and provide that analysis to the ALJs in those cases. The project began October 31 and will run through January 31.</li> </ul>

## ODAR CARES PLAN INITIATIVES

Pilot Logistics:	N/A – the EFT/To do assist will continue for a minimum of 120 days. The length will be based on the number of volunteers who express and interest. The remainder of the projects will continue through the end of FY 2016																													
Outcomes:	<p>September 2016 Updates:</p> <table><tr><th>Unit</th><th>Receipts</th><th>Pending</th><th>Completed</th><th>Percentage</th></tr><tr><td>Dismissals</td><td>1,865</td><td>0</td><td>1,865</td><td>100%</td></tr><tr><td>Unrep’d cases</td><td>7,824</td><td>190</td><td>7,634</td><td>97.5%</td></tr><tr><td>Non-dibs</td><td>3,116</td><td>247</td><td>2,869</td><td>92.1%</td></tr><tr><td>Aged cases</td><td>2,776</td><td>278</td><td>2,498</td><td>89.9%</td></tr></table> <ul style="list-style-type: none"><li>EFT/To-Do Items:<ul style="list-style-type: none"><li>Minimally successful</li><li>Good for employee enrichment</li><li>No future projection of application</li><li>No data</li><li>OQR Employees used for EFT/WKUP: Originally (0), April (6), June (6), Currently (6)</li></ul></li></ul>					Unit	Receipts	Pending	Completed	Percentage	Dismissals	1,865	0	1,865	100%	Unrep’d cases	7,824	190	7,634	97.5%	Non-dibs	3,116	247	2,869	92.1%	Aged cases	2,776	278	2,498	89.9%
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## ODAR CARES PLAN INITIATIVES

CATEGORY:	Staffing and Facilities																														
TITLE:	ALJ Hiring																														
LEAD(s):	Barbette Smith																														
Stakeholders:	IFPTE																														
Permanent/Pilot?	Permanent																														
Issue:	<p>ODAR needs additional ALJs to address ODAR's expanding workload and hearings backlog. The ALJ hiring process is complex and requires a great deal of staff time to efficiently process ALJ applications. The hiring process often requires input from the Chief ALJ, the Deputy Chief ALJ, an Associate Chief ALJ, one Branch Chief, one Special Projects Officer, one Management Analyst, and one Management Support Specialist. Depending upon the number of new ALJ candidates, for each round of hiring, we may use up to 15 HOCALJs for interviews, four HOCALJs for folder review, and one Associate Chief ALJ for selections. We selected a Special Projects Officer (SPO) specifically to coordinate the ALJ hiring activities. The new SPO reported on October 5, 2015.</p> <p>ODAR judges participated as OPM Administrative Law Judge (ALJ) Structured Interview (SI) Panel members for the FY 2015 Proctored Component of the ALJ examination in August and September 2015. In FY 15, we hired 202 new ALJs who have reported for duty as shown below.</p> <table border="1"> <thead> <tr> <th>Enter on Duty Date</th><th>Number of ALJ Hires</th></tr> </thead> <tbody> <tr><td>January 25, 2015</td><td>46</td></tr> <tr><td>March 22, 2015</td><td>39</td></tr> <tr><td>May 17, 2015</td><td>20</td></tr> <tr><td>June 28, 2015</td><td>45</td></tr> <tr><td>August 9, 2015</td><td>6</td></tr> <tr><td>August 17, 2015</td><td>4</td></tr> <tr><td>August 23, 2015</td><td>2</td></tr> <tr><td>September 20, 2015</td><td>29*</td></tr> <tr><td>September 27, 2015</td><td>3*</td></tr> <tr><td>October 4, 2015</td><td>2*</td></tr> <tr><td>January 24, 2016</td><td>5**</td></tr> <tr><td>February 7, 2016</td><td>1**</td></tr> <tr> <td>*updated due to changes in reporting dates **One of the six will EOD February 7, 2016.</td><td></td></tr> <tr> <td>TOTAL</td><td>202</td></tr> </tbody> </table> <p>In FY15, 110 ALJs left the agency through attrition. With departures and new appointments, we have, 1,499 ALJs on duty as of September 30, 2015.</p>	Enter on Duty Date	Number of ALJ Hires	January 25, 2015	46	March 22, 2015	39	May 17, 2015	20	June 28, 2015	45	August 9, 2015	6	August 17, 2015	4	August 23, 2015	2	September 20, 2015	29*	September 27, 2015	3*	October 4, 2015	2*	January 24, 2016	5**	February 7, 2016	1**	*updated due to changes in reporting dates **One of the six will EOD February 7, 2016.		TOTAL	202
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Plan:	<p>ODAR has been actively hiring ALJs. In FY 15, we have hired 202 new ALJs and are continuing the hiring process. In support of the CARES plan, we projected needing to hire 250 ALJs a year in FY 2016, FY 2017 and FY 2018.</p> <p>Due to budget cuts and an insufficient number of acceptable candidates, ODAR reduced</p>																														

## ODAR CARES PLAN INITIATIVES

	the hiring target for FY 2016 from 250 to 225.
Timeline:	<p>Enter on duty (EOD) updates:</p> <p>6/13/16 – 1 ALJ transfer</p> <p>6/27/16 – 40 new ALJs (included 3 new ALJs from the prior round) and 2 ALJ transfers</p> <p>7/11/16 – 8 new ALJs</p> <p>7/25/16 – 47 new ALJs</p> <p>8/4/16 – 1 new ALJ</p> <p>8/8/16 – 4 new ALJs</p> <p>Other updates:</p> <p>7/1/16 – Request sent to OPE for 79 certificates.</p> <p>07/31/2016 - 151 ALJs were hired.</p> <p>08/2016 – Began third round of interviews</p>
Outcomes:	ALJ hiring has a direct impact on the time claimants wait for a hearing decision. Sustained funding and the ability to hire at least 250 ALJs in FY 2016, at least 250 ALJs in FY 2017, and at least 250 ALJs in FY 2018 will allow us to achieve an average wait time of 270 days by the end of FY 2020.

## ODAR CARES PLAN INITIATIVES

CATEGORY:	Employee Engagement Activities
TITLE:	Compass Program – Discovery Path
LEAD(s):	Tammy Farmer
Pilot/Permanent?	Permanent (but will be rotating development program)
Stakeholders	NTEU, AFGE, IFPTE
Issue:	The objective of this initiative is to provide ODAR employees, separate from any formal development program, continual access to career building informational and educational programs that will enhance their skills sets and ability to compete for future promotions.
Plan:	Will provide a web-access portal for ODAR employees to use, with new programs being added on an ongoing basis.
Timeline:	<ul style="list-style-type: none"><li>• March 31, 2016 - Discovery website launched</li></ul>
Outcomes:	Expected improvements in FEVS scores related to Employee Engagement and career education.

# ODAR CARES PLAN INITIATIVES

CATEGORY:	Staffing and Facilities
TITLE	Capacity and Co-Location Plan
LEAD(s):	Reggie Jackson/Joe Lytle/(b) (6)
Pilot/Permanent?	Permanent
Stakeholders:	Public/Community at Large, Congress, DCBFQM, DCO, Unions
Issue:	<p>ODAR must align our space with future staffing needs to support multiple service channels, telework, co-location and additional space needs. The CARES Plan is based the President's budget, and includes growing the ALJ corps to over 1,900 judges, a net increase of 375 judges by FY 2020. Additionally, support staff will increase by a net 1,700 employees. However, this is dependent upon sustained and adequate funding through FY 2020. ODAR (and SSA at large) must also re-evaluate the real estate footprint of our offices in accordance with OMB requirements. As our staff grows, we will continuously assess our footprint in order to optimize space to meet the OMB requirements.</p>
Plan:	<p>OBFS receives requests from Regional Offices (RO) about space needs, office improvements, and office structure changes. OBFS will require that an RO supports each request with data showing a direct service need.</p> <p>Factors of analysis for service delivery:</p> <ul style="list-style-type: none"> <li>• Service need</li> <li>• Impact on agency footprint</li> <li>• Budget</li> <li>• Impact to the public</li> </ul> <p>OBFS will then evaluate the space requests using the following phases:</p> <ul style="list-style-type: none"> <li>• Phase I – Service need within the existing foot of ODAR;</li> <li>• Phase II – Footprint expansion of ODAR within but no Agency footprint expansion; and</li> <li>• Phase III – Footprint expansion of the Agency needed due to dire service needs.</li> </ul>
Timeline:	<ul style="list-style-type: none"> <li>• July 2016 – Obtained approval from Acting Commissioner Colvin to establish 6 new offices utilizing existing agency space and convert 2 site types (e.g. changing a video hearing center to a satellite office) within their current space. <ul style="list-style-type: none"> <li>○ Working with regions on 8 space actions were approved to move forward</li> </ul> </li> <li>• September 2016 - Ongoing analysis of service delivery including budget, staffing, and space; <ul style="list-style-type: none"> <li>○ Assessment in progress on FY 2017 and FY 2018 co-located/blended sites</li> <li>○ Continued progress contingent upon sustained and adequate funding</li> </ul> </li> <li>• TBD FY 2017 – Approval of 5 proposed co-located/blended sites to be completed</li> <li>• TBD FY 2018 – Approval of 5 proposed co-located/blended sites to be completed</li> </ul>
Outcomes:	<ul style="list-style-type: none"> <li>• FY 2016 – 8 proposed co-located/blended sites to be completed (locations will be</li> </ul>

Transition Team Member Document – Non-Public Information This document may only be disclosed to authorized Transition Team members



## ODAR CARES PLAN INITIATIVES

	<p>reported to CARES team when plan in place for each site)</p> <ul style="list-style-type: none"><li>• FY 2017 – 5 proposed co-located/blended sites to be completed (locations pending analysis and final budget)</li><li>• FY 2018 – 5 proposed co-located/blended sites to be completed (locations pending analysis and final budget)</li><li>• As of November 2016 – 26 new SSR sites established since November 2015, with a total now at 157 SSR sites.</li></ul>
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## ODAR CARES PLAN INITIATIVES

CATEGORY:	Employee Engagement Activities
TITLE:	Employee Engagement Initiatives—Compass – Voyage
LEAD(s):	Tammy Farmer
Pilot/Permanent?	Permanent (as part of rotating ODAR development program)
Stakeholders	NTEU, AFGE, IFPTE
Issue:	The Voyage Program will provide eligible full-time and part-time ODAR employees at the GS-4 through GS-11 grade level a combination of details and mentoring outside their current positions. The goal is to improve their ability to compete for higher graded vacancies.
Plan:	<p>Offer a variety of developmental assignments, virtual training, and self-instructional training, including:</p> <ul style="list-style-type: none"> <li>• Two six-month detail assignments</li> <li>• Designated mentors</li> <li>• Individual Development Plans</li> <li>• Virtual training courses and workshops</li> <li>• Temporary promotions and opportunities to perform work at higher grade levels</li> </ul>
Timeline:	<ul style="list-style-type: none"> <li>• 07/18/2016: Voyage Program GS-5 through GS-8 vacancies announced (for GS-4 through GS-7 employees).</li> <li>• 08/01/2016: Voyage Program GS-9 through 12 vacancies announced (for GS-8 through GS-11 employees).</li> <li>• 10/24/2016: Applications still in process, with BQ lists received. Structured interviews pending managerial availability.</li> <li>• Week of 11/28/2016 – final selections expected to be made.</li> <li>• Week of 12/4/2016 – selectees notified.</li> <li>• Week of 12/11/2016 – ODAR wide notice provided of selections.</li> <li>• Week of 1/23/2017 – Start of 1-year program.</li> </ul>
Outcomes:	Expected increase in FEVS scores and overall employee job satisfaction based on new opportunities provided.

## ODAR CARES PLAN INITIATIVES

CATEGORY:	Employee Engagement Activities
TITLE:	Compass – Summit Path
LEAD(s):	Tammy Farmer
Pilot/Permanent?	Permanent (as part of rotating ODAR development program)
Stakeholders	NTEU, AFGE, IFPTE
Issue:	The objective of this initiative is to provide competitive, structured 12-month development opportunities for ODAR employees at the GS-14 and GS-15 levels, as well as ODAR ALJs and AAJs, to make them more competitive for future regional and national leadership positions.
Plan:	Will include temporary rotational assignments, either temporary promotions or reassignments, structured mentoring, and opportunities to perform leadership responsibilities.
Timeline:	<ul style="list-style-type: none"><li>• TBD: Launch of Summit (for GS-14 through GS-15 employees) (budget delays)</li></ul>
Outcomes:	Expected increase in FEVS scores and overall employee job satisfaction based on new opportunities provided.

## ODAR CARES PLAN INITIATIVES

CATEGORY:	Employee Engagement Activities
TITLE:	Employee Engagement Initiatives—Compass--Expedition
LEAD(s):	Tammy Farmer
Pilot/Permanent?	Permanent (as part of rotating ODAR development program)
Stakeholders	NTEU, AFGE, IFPTE
Issue:	The objective of this initiative is to provide competitive, structured 12-month development opportunities for ODAR employees at the GS-12 through GS-14 levels to make them more competitive for future local and regional management positions.
Plan:	Will include a series of details and assignments, structured mentoring, personally designed Individual Development Plans (IDPs), temporary promotion opportunities and performance of work responsibilities at higher graded levels.
Timeline:	<ul style="list-style-type: none"><li>TBD: Launch of Expedition (for GS-12 through GS-14 employees) (budget delays)</li></ul>
Outcomes:	Expected increase in FEVS scores and overall employee job satisfaction based on new opportunities provided.

## ODAR CARES PLAN INITIATIVES

CATEGORY:	Employee Engagement
TITLE:	Hearing Office Case Analyst Pilot (HOCA)
LEAD(s):	Tammy Farmer/Patrick DeFalco
Stakeholders	ODARMA, AFGE, NTEU
Pilot/Permanent?	Pilot
Issue:	<p>With over a million cases pending, ODAR, as well as its counterparts throughout SSA, is focusing on the urgency of the situation – the precision in our hearings operation to deliver the hearing decisions we need to make – and our accountability to the American people to provide superior customer service. Additionally, GS-8 support staffs are in need of developmental opportunities to "bridge" to positions within ODAR at a higher grade. The GS-9 HOCA will focus on the area of case readiness in our 163 hearing offices nationwide. We need to have cases reviewed for quality and accuracy to examine and analyze the sufficiency of documentation and development in accordance with the regulatory provisions of Titles II, VIII, and XVI of the Social Security Act, as amended, as well as compliance with other standardized business processes. The position will also provide needed case analysis and centralize complex workloads in order to assist ALJs with issuing timely decisions.</p>
Plan:	<p>The Hearing Office Case Analyst Position has been developed to pilot throughout the country for a two-year period. Initially, there will be approximately 163 allocations, which will enable almost every office to have at least one position. OEOHR will work with the SPOs to announce the vacancies. A selection package will be provided and will include assessment criteria, interview questions and supervisor reference checks. Regional Offices will coordinate selections with Hearing Offices.</p>
Timeline:	<ul style="list-style-type: none"> <li>• 04/2016: HOCA Position Description finalized, signed off and provided to OPE</li> <li>• 05/2016: OEOHR provided management assessment criteria, selection criteria and interview process information</li> <li>• 05/2016: HOCA Vacancies announced</li> <li>• 06/2016: HOCA Training Cadre established</li> <li>• 06/2016: HOCA selections made nationwide</li> <li>• 06/2016: All Manager's Call used to address vacancies, selections and training</li> <li>• 07/2016: HOCA Training Pre-Requisites released</li> <li>• 07/2016: HOCA Basic Training Classes held</li> <li>• 08/2016: HOCA Basic Training Classes completed</li> <li>• 08/2016: HOCA Connect SharePoint site under development</li> </ul>

## ODAR CARES PLAN INITIATIVES

	<ul style="list-style-type: none"><li>• 09/2016: HOCA Mentoring Plan to be completed</li><li>• 09/2016: HOCA Pilot Evaluation Plan under development</li><li>• 10/2016: HOCA Connect launched 10/13; HOCA PACS materials released on 10/17; OESSI working on management reports to track workloads; and supplemental training under development.</li></ul>
Pilot Locations:	Hearing Offices nationwide
Outcomes:	<ul style="list-style-type: none"><li>• Provide needed support to ALJs in the area of case readiness to help reduce pending hearings and increase efficiency in hearings held and decisions issued.</li><li>• Establish additional career opportunities in the form of a bridge position for future advancement of support staff.</li><li>• Allow for further training and enhanced employee knowledge.</li><li>• 2 Year Pilot will be evaluated at quarterly intervals through numerical measurements and management survey data.</li></ul>

# ODAR CARES PLAN INITIATIVES

CATEGORY:	Employee Engagement Activities
TITLE:	Employee Engagement Initiatives--Communication
LEAD(s):	Tammy Farmer/Patrick DeFalco
Pilot/Permanent?	Permanent ongoing initiative
Stakeholders	NTEU, AFGE, IFPTE, ODARMA, HOCALJ Association
Issue:	The objective of this strategy is to develop ongoing methods of communicating with employees to engage them in the mission of the agency. The Social Security Administration's story is a powerful one that we want to leverage to inspire and engage all employees.
Plan:	<p>Communication is key to employees feeling engaged and involved in the organization and its goals. Employees want to be informed and play an active part in ODAR's mission to work through the backlog and address our expanding workloads.</p> <p>Enhancing communication will help build a shared set of goals across ODAR. The key deliverables under this strategy include:</p> <ul style="list-style-type: none"> <li>• National and Regional Town Hall Meetings- share mission and communicate initiatives/changes</li> <li>• Providing employee personal development resources</li> <li>• Communicating engagement initiatives</li> <li>• Providing managers with necessary resources to effectively lead</li> <li>• New Hire Orientation- inspire commitment to mission/invest in employees</li> </ul>
Timeline:	<ul style="list-style-type: none"> <li>• 05/2016: Completed Health/Wellness Employee Message</li> <li>• 05/2016: Released Smart Hiring Guidance</li> <li>• 06/2016: FEVS Marketing Plan completed</li> <li>• 07/2016: New Hire Orientation video script for DC and ADC developed</li> <li>• 08/2016: Wellness website development begun</li> <li>• 08/2016: New Hire video from DC and ADC recorded</li> <li>• 08/2016: Training needs survey with OQI developed and released</li> <li>• 08/2016: Initiated Work/Life Balancing Message</li> <li>• 11/2016: FEVS Scores Messages</li> </ul>
Outcomes:	<ul style="list-style-type: none"> <li>• FEVS scores for diversity, inclusion and engagement for 2016 to be compared to 2015 to monitor improvement</li> <li>• Results of Training Needs Survey to be analyzed for needed improvements or adjustments</li> <li>• Employee Engagement Taskforce to transition into advisory role</li> </ul>

# ODAR CARES PLAN INITIATIVES

The top of the page features a decorative header with the text "ODAR CARES PLAN INITIATIVES" in a dark blue, serif font. Below the text, there are three thick, wavy blue lines that sweep across the top of the page, creating a dynamic, flowing effect.



## ODAR CARES PLAN INITIATIVES

CATEGORY:	Employee Engagement Activities
TITLE:	Leadership Training
LEAD(s):	Tammy Farmer/Patrick DeFalco
Pilot/Permanent?	Permanent
Stakeholders	ODARMA, HOCALJ Association
Issue:	We plan to invest in our management team so they will have the tools necessary to develop and support our most valuable resource--engaged, productive employees. Our leadership initiatives will encourage leading with integrity, with a focus on "service over self."
Plan:	<p>ODAR created an Employee Engagement Task Force to address this issue develop appropriate training. The key deliverables under this strategy include:</p> <ul style="list-style-type: none"> <li>• Providing comprehensive leadership training entitled "Better Together" for all ODAR managers that focuses on diversity, inclusion and the "New IQ." Approximately 1,000 managers will be trained on topics including analyzing the value of FEVS, building inclusive teams to build a more effective and productive office.</li> <li>• We will supplement this year's training with resources and additional training in future fiscal years, as resources allow.</li> </ul>
Timeline:	<ul style="list-style-type: none"> <li>• 03/2016: "Better Together" Leadership Curriculum developed by Employee Engagement Taskforce</li> <li>• 05/2016: Innovative delivery method developed utilizing "grouping" of office management teams either in person (when in close proximity) or via VTC to save travel money while maintaining interactive nature of training</li> <li>• 06/2016: Total of 58 training sessions in all 10 regions, the NHCs, the NCACs, the ROs and HQ scheduled</li> <li>• 06/2016: Held Train the Trainer in Falls Church for all 11 instructors with 4 HQ sessions for 125 managers</li> <li>• 07/2016 - 09/2016: In-Person and Video Sessions held nationwide for all ODAR managers</li> <li>• 11/2016: Employee Engagement Task Force After Action report presented to DC Gruber and ADC Calvert.</li> <li>• 12/2016: Employee Engagement Task Force After Action report presented to RCALJ/RMO.</li> </ul>
Outcomes:	Comprehensive evaluation forms completed by all leadership training participants. Data tracked using "Survey Monkey" and analyzed. Results are overwhelmingly positive, with average scores greater than 4 on a 5 point scale for both content and instructors.

## ODAR CARES PLAN INITIATIVES

CATEGORY:	Employee Engagement Activities
TITLE:	Expand Telework
LEAD(s):	Robert Jandrich/Tom Nanni
Pilot/Permanent?	Permanent
Stakeholders	NTEU, AFGE, IFPTE
Issue:	The objective of this strategy is to increase availability for telework under current collective bargaining agreements.
Plan:	Engage with IFPTE, NTEU, and AFGE to increase availability for telework under current collective bargaining agreements.
Timeline:	<ul style="list-style-type: none"><li>• June 4, 2015 - Initial AFGE-ODAR Telework MOU</li><li>• October 13, 2015 - AFGE-ODAR Telework Settlement Agreement</li><li>• October 16, 2015 - ODAR/OEOHR Memo Expanding Telework for NTEU Legal Assistant Positions</li><li>• March 31, 2016 - AFGE-ODAR Telework Clarification Agreement</li><li>• September 14, 2016 - NTEU-ODAR Article 17 (Telework) bargaining – FSIP Decision regarding 4<sup>th</sup> day of telework issued. Finalization of new Article language pending.</li></ul>
Outcomes:	ODAR completed the initiative related to expanding telework since the release of the CARES plan in January. ODAR met all of the telework bargaining agreements with relation to the government-wide mandate on telework.

Office of Facilities and Logistics Management (OFLM)

We are the agency's liaison with the General Services Administration (GSA), Public Buildings Service (PBS) for budgetary obligations, master housing, and leasing for all GSA owned, delegated, and leased properties nationwide. We directly manage our headquarters space and provide guidance to our regional offices regarding space planning, layout, utilization, and occupancy to ensure compliance with agency Space Allocation Standards (SAS) and Office of Management and Budget (OMB) Memorandum M-12-12 Section 3: Freeze the Footprint and Reduce the Footprint (RTF).

We continually seek opportunities to reduce our agency's real estate footprint, typically when leases expire, by right-sizing new lease requirements to meet our SAS. Additionally, we are working with GSA to improve space utilization in our large delegated facilities, as GSA is hoping to provide additional space within these facilities for other Federal tenants to help these agencies achieve their RTF goals.

Despite an increasing need for our services, we made great strides to do more with less space—our footprint is shrinking. We successfully met the mandates of the Freeze the Footprint (FTF) initiative. At the end of fiscal year (FY) 2015, we reduced 1.41 million usable square footage (USF), or 5.3 percent, compared to our FY 2012 baseline.

By the end of FY 2016, preliminary assessments indicate we reduced our portfolio by approximately 94,000 USF. Additionally, our RTF Plan calls for an additional 450,000 USF reduction in office space from FY 2017 through FY 2021. Reductions from our large sites will be a key component in achieving these reductions, dependent on budget approval for those projects. Moreover, while we have been shrinking our real property footprint for several years, in FY 2016, our overall year-over-year rent went down for the first time. This is a particular accomplishment given that rent escalates year-over-year due to market conditions and inflation.

We are pursuing several large expiring-lease replacement actions, including the Security West building in Woodlawn, MD; the International Trade Commission (ITC) building in Washington, DC (which includes an office for the Commissioner); and the Dallas Regional Office in Dallas, TX. Collectively, these lease-replacements will reduce our real estate footprint by over 360,000 USF.

We are also working with GSA on improving our space utilization in Federally-owned, delegated buildings, including the Frank Hagel Federal Building, in Richmond, CA; the Addabbo Federal Building in Jamaica, NY; the Mid Atlantic Social Security Center in Philadelphia, PA; and the Harold Washington Social Security Center in Chicago, IL.

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Transition Team Member Document--Non-Public  
Information. This document may be disclosed to  
Authorized Transition Team Members only.

## **NAPA Report & Vision 2025 Crosswalk**

### **Superior Customer Experience**

NAPA	First, SSA must improve its operational efficiency while continuing to provide access to quality service for all of its customers. The Panel believes that SSA should employ virtual channels (e.g., online, phone, videoconference) as the primary means of service delivery in the future while remaining committed to providing personal service delivery options as necessary and appropriate, including traditional in-person service delivery in the field as well as virtual options for providing direct assistance and face-to-face interaction. (Page 7)
Vision 2025	In 2025, we provide highly-personalized interactions and tailored services to our customers at their point of need and in real-time. Our customers have choices in terms of when, where, and how they receive services. We satisfy an inter-generational customer base with a range of preferences in technology and interactions, by offering a variety of service delivery methods, such as in-person at our field and hearing offices, on the phone, over real-time video or chat, or by self-service. We interact responsively with our customers face-to-face, in written communications, and through digital alternatives for connecting customers to our employees for assistance. (Page 13)
NAPA	Second, aggressive adoption of technology solutions should create opportunities both to improve customer service and to free up resources for face-to-face interaction and direct assistance where needed. Technology solutions should be well designed and so user-friendly that they become customers' choice for conducting most transactions. (Page 7)

## **NAPA Report & Vision 2025 Crosswalk**

Vision 2025	For those customers who choose self-service options, we design our technology to support the ultimate goal of providing a seamless, superior customer experience across all methods of contact. From better computer-telephone integration to systems designed around our customers as individuals – not as cases or claims – we invest in the right technology to better understand our customer’s life journey and create the personalized, relevant and efficient experience customers need. We prioritize our technology investments based on customer needs, ease of use, and improving access to our services, and work to eliminate antiquated systems. (Page 14)
NAPA	We employ a robust regime for providing information security and protecting customers’ personal information over the entire data life cycle. (Page 42)
Vision 2025	Our customers are confident their personal information is protected, no matter which method of service they select. We incorporate leading cybersecurity practices and real time identity verification into all technology and systems. (Page 14)
NAPA	Our integrated and diverse service delivery workforce is able to identify customer needs and manage transactions to completion efficiently and effectively. (Page 43)
Vision 2025	We actively listen to all of our customers, and we rely on secure, accurate, real-time information and analytics to better understand our customers’ preferences. Through this understanding, we respond to and anticipate our customers’ needs, and thoughtfully craft appropriate service options. (Page 10)

## **NAPA Report & Vision 2025 Crosswalk**

### **Exceptional Employees**

NAPA	Our labor-management relations have a strategic focus on improving agency performance. (Page 43)
Vision 2025	As an employer of choice, we implement human resource management best practices and work with our labor unions to develop an effective talent management and rewards strategy. (Page 22)
NAPA	We employ a flexible grade and compensation structure to facilitate career paths that encourage employee retention by providing employee development opportunities across the organization or with partner organizations. (Page 43)
Vision 2025	In 2025, we attract top talent and support our employees through active and continuous engagement, empowerment to make decisions that best serve our customers, and developmental opportunities that span the government. We also offer dynamic career paths and multiple opportunities for professional growth. (Page 10)

### **Innovative Organization**

NAPA	We simplify programmatic, administrative, and operational policies in order to facilitate customers' applications for benefits and our processing of them. (Page 40)
Vision 2025	Our program rules are simplified to provide clear meaning for both customers and employees, thus enabling efficient processing of benefits. (Page 19)



## **NAPA Report & Vision 2025 Crosswalk**

NAPA	Our employees access integrated customer data, enabling efficient delivery of services across our programs and with other related government programs. (Page 41)
Vision 2025	Our data-sharing activities supply accurate, relevant and real-time data to prevent improper payment and ensure integrated customer service for social insurance programs and external partners. (Page 20)
NAPA	Our work processes are fully automated, except for those decisions that require some human judgment. We use expert systems to guide employees. (Page 41)
Vision 2025	Our flexible and automated tools are designed to support Social Security programs by integrating policy, process, and data into our systems to support our knowledgeable employees. (Page 16)
NAPA	Our work is “portable” (e.g., electronic case files enable matching workload with available workforce capacity, advancing telework). (Page 41)
Vision 2025	Access to advanced portable technologies provides flexibility to our employees, empowering them to serve Social Security customers from various locations in a way that accommodates their personal lives. (Page 16)
NAPA	We systematically employ data analytics to inform the development of more efficient business processes and ensure program integrity. (Page 41)
Vision 2025	Technology and data analytics give us faster access to more and better data. We have also streamlined our processes and procedures to minimize errors. (Page 20).
NAPA	We maximize data sharing with external partners. (Page 42)

## **NAPA Report & Vision 2025 Crosswalk**

Vision 2025	Our data-sharing activities supply accurate, relevant and real-time data to prevent improper payment and ensure integrated customer service for social insurance programs and external partners. (Page 20)
NAPA	We use a disciplined and responsive management process to enable planning and implementation of new business solutions, utilizing industry best practices to rapidly meet IT and other business requirements. (Page 42)
Vision 2025	Through the creation of a network of integrated internal systems, we will operate as a unified organization, sharing information and using data across service areas and teams. Our IT investment approach will reflect prioritization of our current and emerging business needs. (Page 22)
NAPA	We embrace change and recognize the importance of purposeful risk (e.g., encouraging new development opportunities and potentially high-yield initiatives). (Page 44)
Vision 2025	We will engrain informed risk-taking and continuous improvement in our culture, and welcome both as positive contributions. (Page 22)
NAPA	We institutionalize long-term, strategic thinking throughout the organization (e.g., planning, organizational structure, and business processes). (Page 44)
Vision 2025	We will implement new ways for our leaders to engage in strategic planning to identify solutions, prioritize initiatives, measure the right efforts, and hold ourselves accountable for achieving this vision and related successes. (Page 23)
NAPA	Clear policy direction and automated decision support empower employees and improve efficiency while ensuring quality and program integrity. (Page 44)

## **NAPA Report & Vision 2025 Crosswalk**

Vision 2025	Our program rules are simplified to provide clear meaning for both customers and employees, thus enabling efficient processing of benefits. (Page 19)
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**Cost of the Financial Statement Audit**

**December 6, 2016**

**Provided by the Office of Budget, Finance, Quality and Management**

The cost of the agency's financial statement audit with KPMG was \$3,737,010.56 in 2016.

## SSA SUPERVISOR RATIO DATA BY DEPUTY COMMISSIONER

FY13 (HRODS data as of September 30, 2013 -- all active employees)					FY16 (HRODS data as of September 30, 2016 -- all active employees)				
Deputy	Total Non-Sup	Total Sup	Total Ees	Super. Ratio -- 1:	Total Non-Sup	Total Sup	Total Ees	Super. Ratio -- 1:	Change from FY 13
DCBFM	729	127	856	5.7	1,900	214	2,114	9.0	↑
DCCOMM	187	38	225	4.9	145	24	169	6.0	↑
DCDAR	9,584	1,120	10,704	8.6	9,530	1,148	10,678	8.3	↓
DCHR	314	77	391	4.1	378	67	445	5.6	↑
DCLCA	56	12	68	4.7	56	11	67	5.1	↑
DCO	39,182	4,987	44,169	7.9	40,477	4,811	45,288	8.4	↑
DCQP	989	121	1,110	8.2	-	-	-	-	-
DCRDP	525	116	641	4.5	511	86	597	5.9	↑
DCS	2,871	314	3,185	9.1	2,943	311	3,254	9.5	↑
OCACT	42	13	55	3.2	46	12	58	3.8	↑
OCSO	0	2	2	0.0	45	8	53	5.6	↑
OGC	641	78	719	8.2	689	79	768	8.7	↑
OCOSS	22	11	33	2.0	50	13	63	3.8	↑
<b>SSA Total</b>	<b>55,142</b>	<b>7,016</b>	<b>62,158</b>	<b>7.9</b>	<b>56,770</b>	<b>6,784</b>	<b>63,554</b>	<b>8.4</b>	<b>↑</b>

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## **Estimated Average Ongoing Cost to Operate a Field Office**

- We estimate that the average annual cost to operate a field office is between \$2M and \$2.5M per office.
- This figure includes average costs for rent, guards, utilities not funded by GSA, supplies, maintenance, security, and personnel.
- Individual office costs may vary greatly based on office location and size.
- This figure does not include one-time start-up costs for office infrastructure and IT hardware/software nor does it include non-personnel costs incurred for workload processing.
- The costs for support functions at the regional office and headquarters (including areas of the agency for policy issues, budgetary/financial matters, centralized IT infrastructure support, human resources, etc.) that provide a supporting role to field offices are also excluded.

*Response prepared by Office of Budget, Finance, Quality and Management*

**Transition Team Member Document--Non-Public Information. This document may be disclosed to  
Authorized Transition Team Members only.**

**December 1, 2016**

# **Social Security Solvency: Background and Options for the Future**

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Steve Goss, Chief Actuary

Karen Glenn, Deputy Chief Actuary

December 14, 2016

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Authorized Transition Team Members only.

# Outline

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- ◆ The aging issue
- ◆ Implications for solvency and sustainability
  - Annual deficits, reserve depletion
  - Comparison to CBO projections
- ◆ Implications for the federal budget
- ◆ Solutions
  - Adjustments to changing conditions



# Developed nations are “aging”

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## ◆ “Macro Aging”

Changing age distribution—older

- Mainly from permanent drop in birth rates after 1965

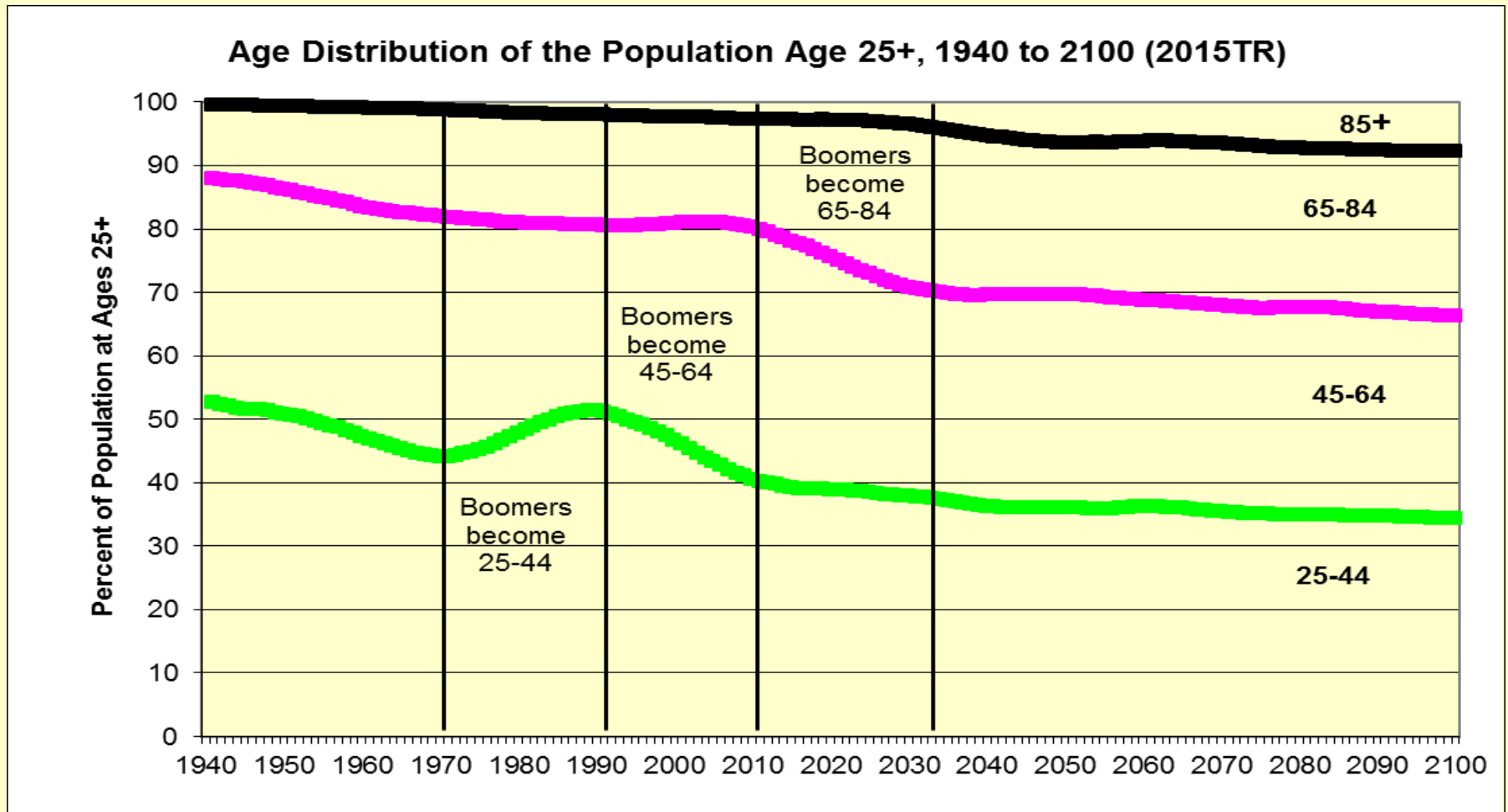
## ◆ “Micro Aging”

People are living longer

- Lower death rates
- Higher life expectancy

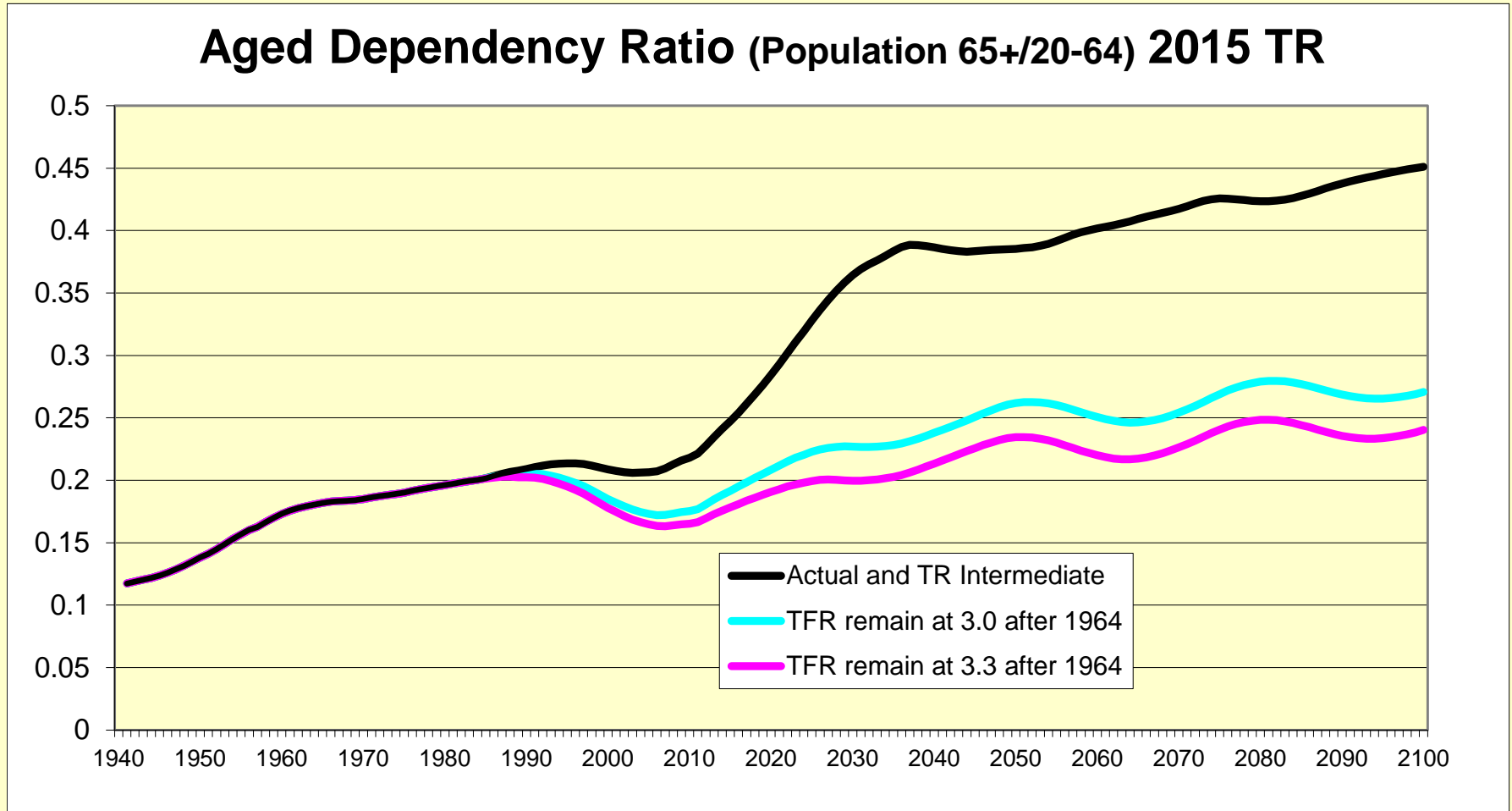
# Implications of “macro aging”

*Lower birth rates shift age distribution*



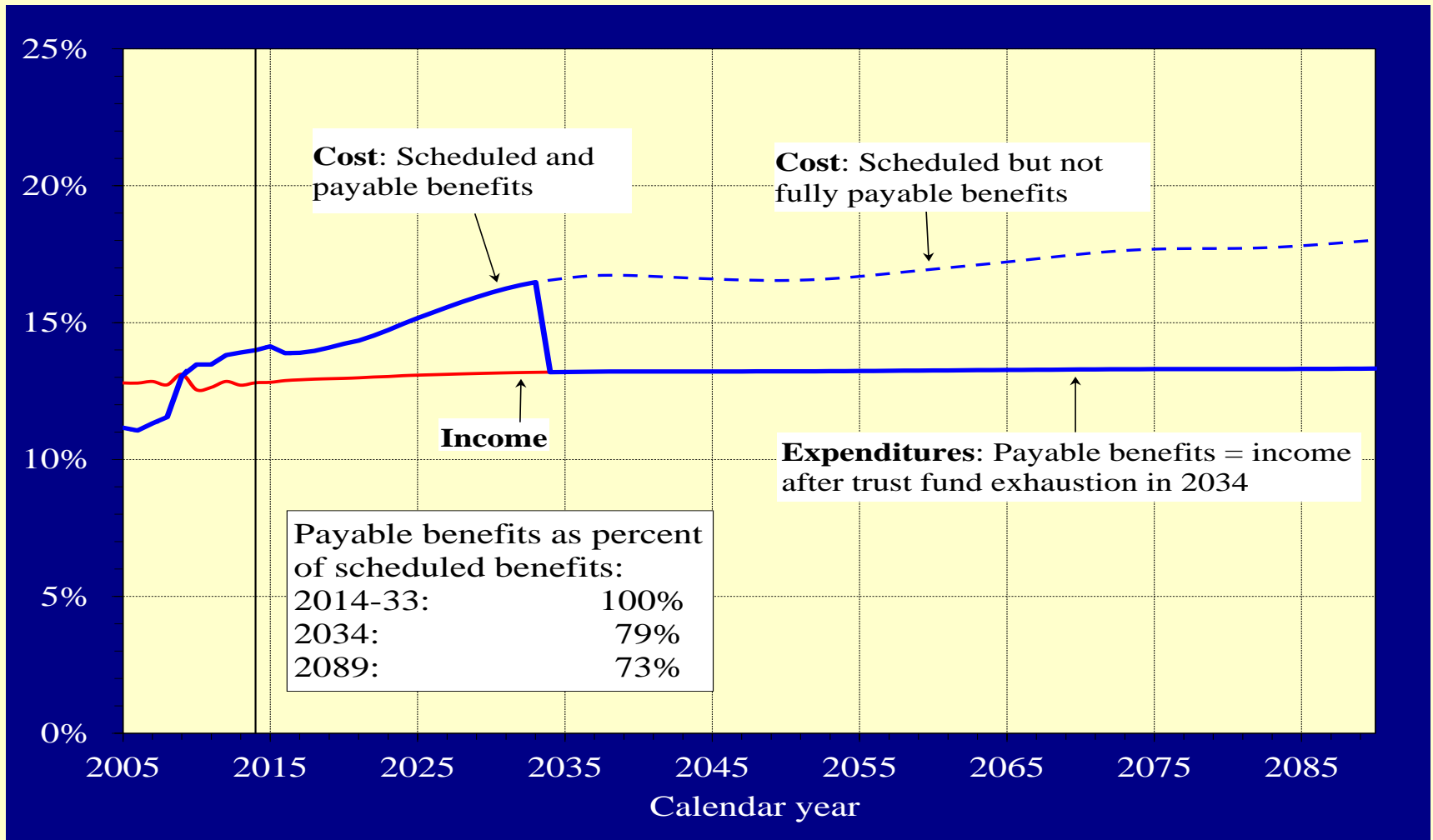
# Implications of “macro aging”

*Aging (change in age distribution) mainly due to drop in birth rates*

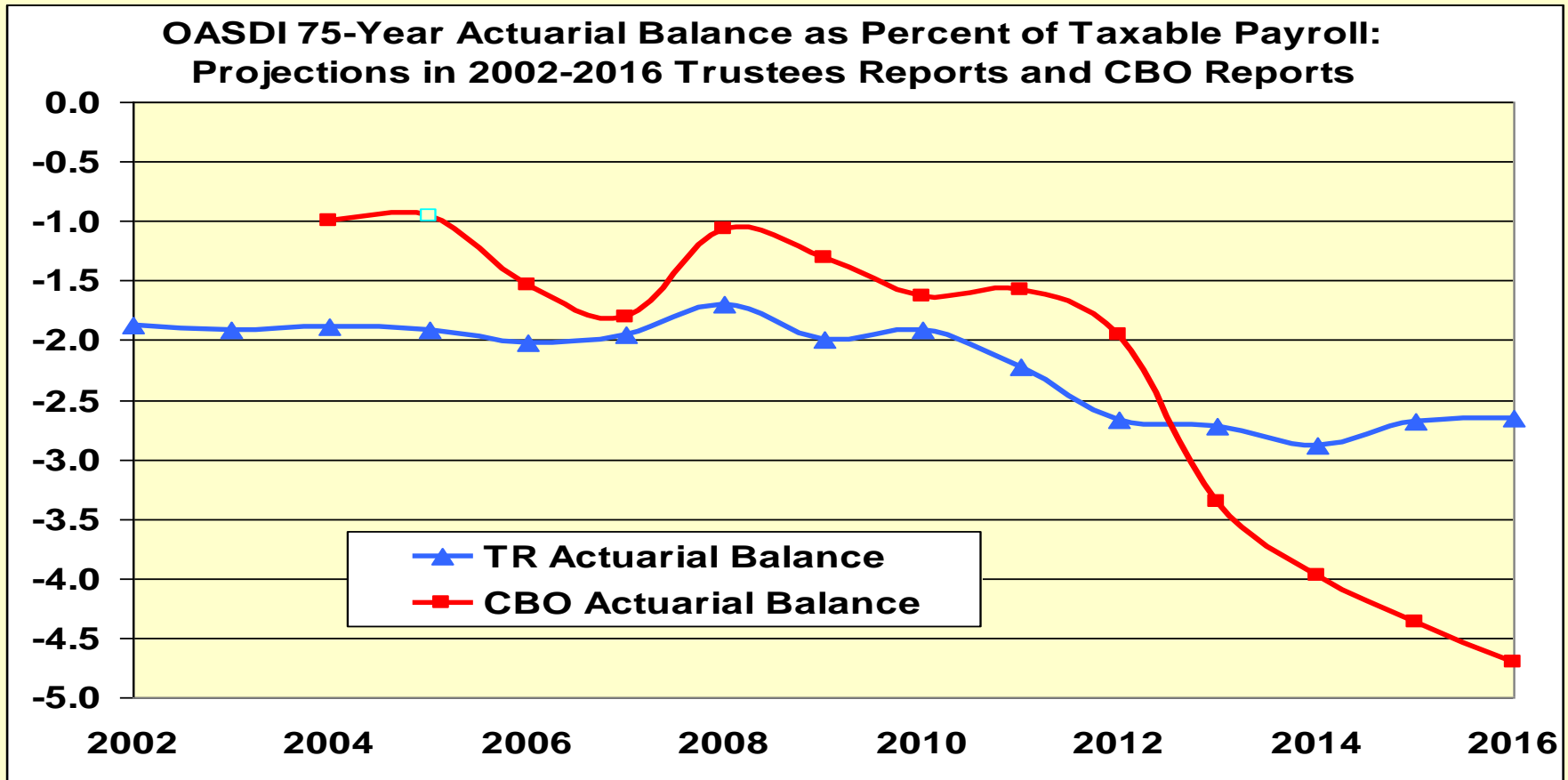


# OASDI annual cost as percent of taxable payroll: rises with the aged-dependency ratio

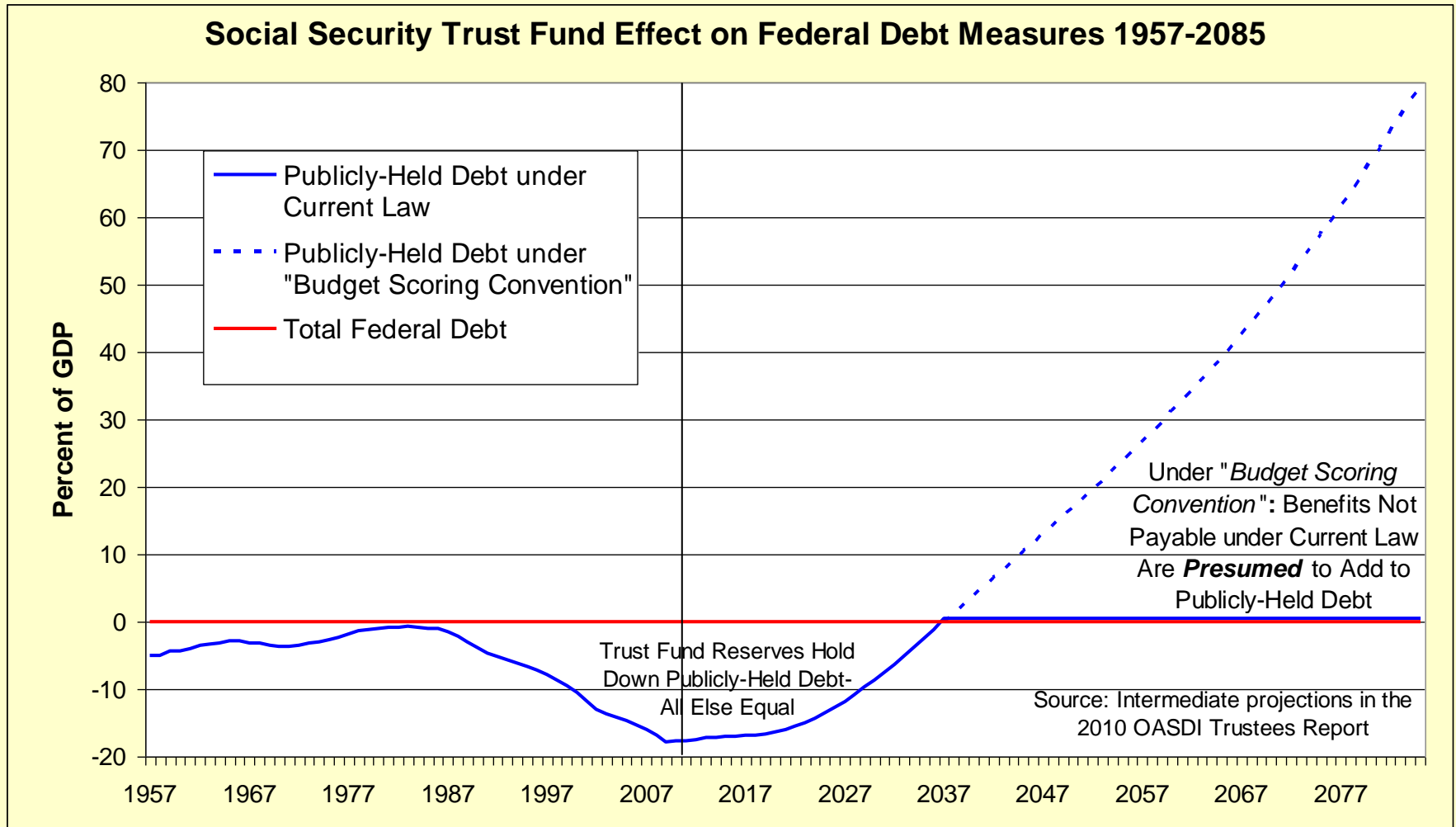
*79% of scheduled benefits still payable at trust fund reserve depletion*



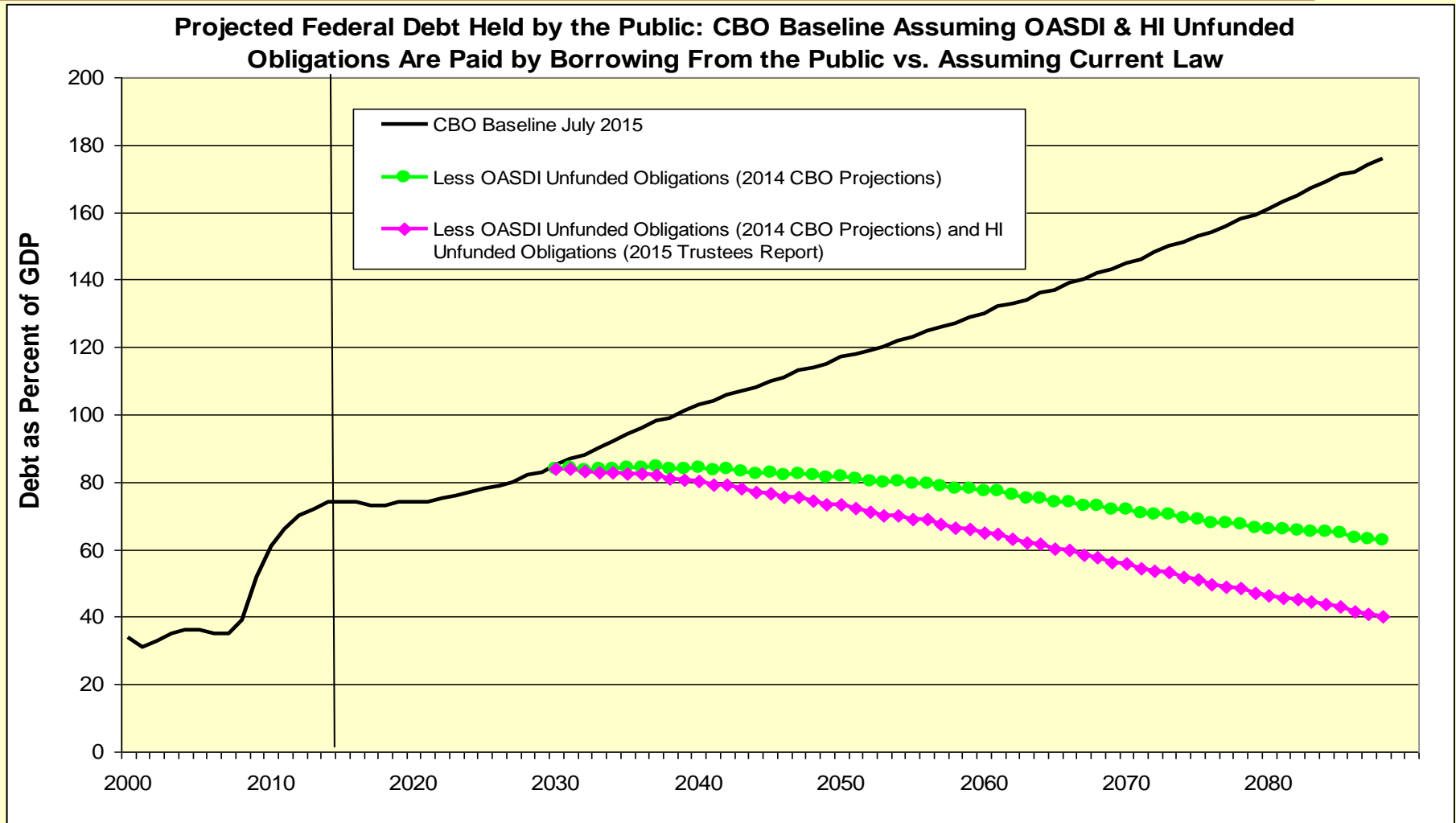
# Recent House Ways and Means Committee Hearing: Comparing Trustees' and CBO Projections of OASDI Actuarial Status



# Trust Fund operations have no effect on total federal debt, and no net effect on publicly-held debt



# So—what if we project federal debt consistent with the law?



# Solutions for the Social Security financial shortfall

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- ◆ “Macro Aging” changes the age distribution: more beneficiaries per worker
  - This will affect all retirement income
  
- ◆ Social Security has exactly the same challenge
  - The older age distribution requires:
    - Beneficiaries receive 25% less,
    - Workers pay 33% more,
    - Increase “Normal Retirement Age” by 5 years,
    - Or some combination



# Ways to lower Social Security cost

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## ◆ Lower benefits

- Reduce the factors in the PIA formula (currently 90, 32, 15 percent)
  - » Could exempt disabled workers
- Increase normal retirement age
  - » By a set formula, as was done in the 1983 amendments
  - » Or by indexing to life expectancy – note this solves less than 20% of the long-range shortfall
  - » Proposals that increase the NRA lower OASDI cost, but **increase** DI cost
- Increase the number of years used in calculation (currently 35)
- Could exempt long-career low earners from any of these proposals to lower benefits

# Ways to lower Social Security cost

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- ◆ Lower benefits mainly for high earners
  - Reduce PIA above some level
  - Often combined with increasing PIA below some level, subject to work year requirements
  - Could also increase taxes on benefits for high earners

# Ways to lower Social Security cost

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- ◆ Lower benefits mainly for the oldest old
  - Reduce the COLA
    - » Use a chained version of the CPI-W
    - » Would on average reduce the annual COLA by 0.3 percentage point
    - » Eliminates about 21% of the long-range shortfall
  - Note some have suggested **raising** the COLA
    - » Use the CPI-E (based on purchases of consumers over age 62)
    - » Would on average increase the annual COLA by 0.2 percentage point
    - » **Increases** the long-range shortfall by about 14%

# Ways to increase Social Security revenue

---

## ◆ Raise tax rate on all earners

- Increasing rate from current 12.4 percent to 15.3 percent is projected to eliminate the long-range shortfall

## ◆ Raise tax on highest earners only

- Increase taxable maximum amount
  - » Taxable maximum is \$118,500 in 2016; covers about 83 percent of all earnings
  - » In 1983, this ratio was about 90 percent!
  - » Increasing the taxable maximum to cover 90 percent of earnings (about \$275,000 in 2016) would eliminate 30 to 40 percent of the long-range shortfall
- Some tax on all earnings above the maximum
  - » At a lower rate?
- What about benefit credit?

# Ways to increase Social Security revenue

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- ◆ Tax employer-sponsored group health insurance premiums
  - Affects only middle class if taxable maximum remains where it is
  - Eliminates about 37 percent of the long-range shortfall
- ◆ Cover all newly hired state and local government employees
  - Eliminates about 6 percent of the long-range deficit
- ◆ Tax certain investment income

# Ways to increase Social Security revenue

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- ◆ Invest a portion of trust fund reserves in marketable securities
  - Currently the law requires investment in “interest-bearing securities backed by the full faith and credit of the United States”
  - Invest 15 percent, 40 percent, more?
  - How would this affect financial markets?
- ◆ Maintain larger trust fund reserves
  - Added interest/yield can lower needed taxes

# Other provisions

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## ◆ Increase benefits for adequacy or equity

- Increase benefits for those age 85 or older
- Enhance minimum benefits
- Caregiver credits
- Provide surviving spouses 75 percent of the couple's benefits
- These options would all add to the long-range shortfall

## ◆ Personal accounts

- Often require a large transition “investment”
- Ryan approach: option for personal account to partially or completely replace OASI, with some type of guarantee

Go to: [www.ssa.gov/OACT](http://www.ssa.gov/OACT) for more proposed changes

# Many comprehensive proposals scored

*Example 1: Simpson/Bowles Fiscal Commission of 2010*

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- ◆ Raise Normal Retirement Age
  - “Hardship exemption” for steady low earners
- ◆ Make PIA formula more progressive
- ◆ Raise taxable maximum to cover 90% of earnings
- ◆ Would have produced “*sustainable solvency*”

Go to: [www.ssa.gov/OACT/solvency/FiscalCommission\\_20101201.pdf](http://www.ssa.gov/OACT/solvency/FiscalCommission_20101201.pdf)  
[www.ssa.gov/OACT/solvency/BowlesSimpsonRivlinDomenici\\_20110202.pdf](http://www.ssa.gov/OACT/solvency/BowlesSimpsonRivlinDomenici_20110202.pdf)



# Many comprehensive proposals scored

*Example 2: Sam Johnson, December 2016*

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- ◆ Make PIA formula more “progressive”
- ◆ Change to mini-PIA approach
- ◆ Raise the Normal Retirement Age
- ◆ Lower the COLA
  - Based on chain-weighted CPI for most beneficiaries
  - No COLA if prior year’s MAGI is above certain thresholds
- ◆ Add a new minimum benefit
- ◆ Eliminate taxation of OASDI benefits in 2054 and later
- ◆ Would produce “*sustainable solvency*”

Go to: [https://www.ssa.gov/OACT/solvency/SJohnson\\_20161208.pdf](https://www.ssa.gov/OACT/solvency/SJohnson_20161208.pdf)

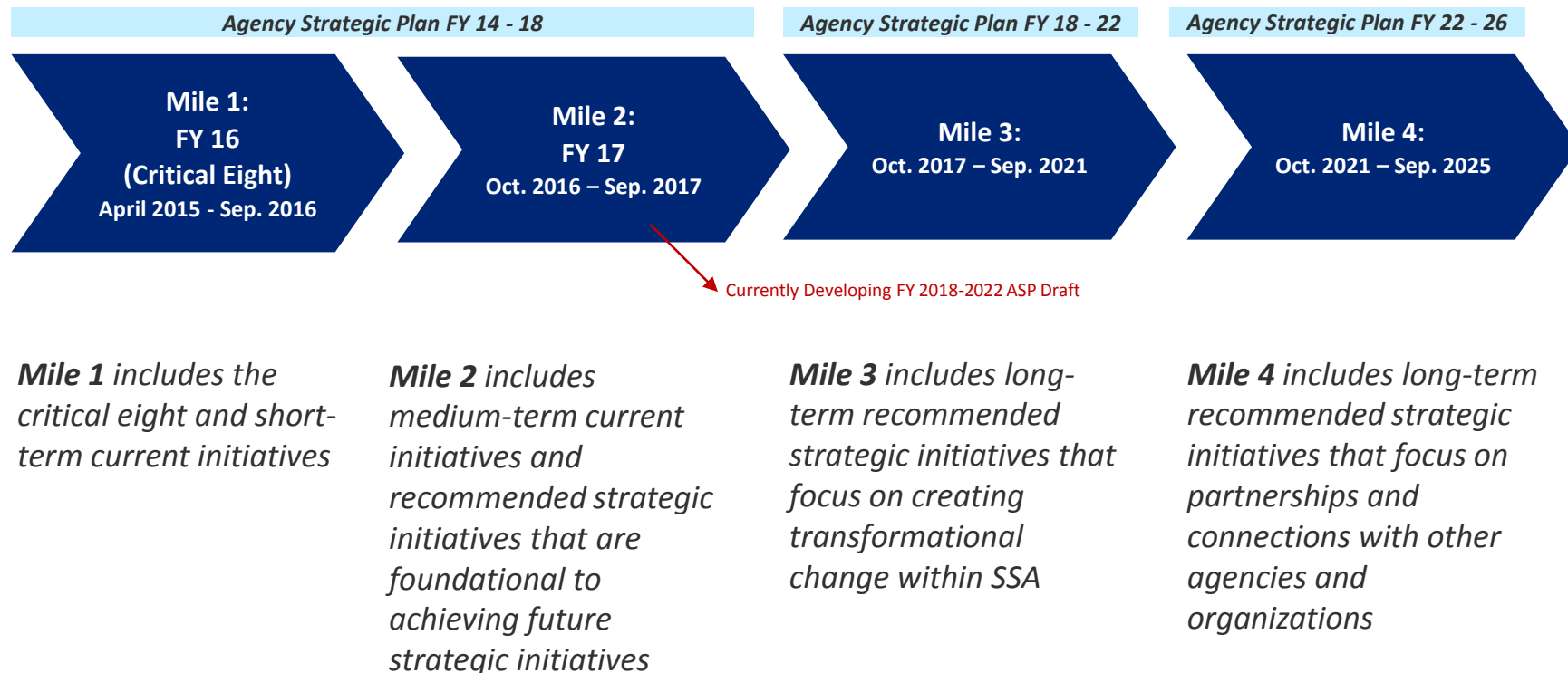
# For more information...

<http://www.ssa.gov/oact/>

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- ◆ All OASDI Trustees Reports
- ◆ Detailed single-year tables for recent reports
- ◆ Our estimates for comprehensive proposals
- ◆ Our estimates for the individual provisions
- ◆ Actuarial notes; including replacement rates
- ◆ Actuarial studies; including stochastic
- ◆ Extensive databases
- ◆ Congressional testimonies

# Implementation Timeline for Social Security's Vision 2025



													Actual
Year	2004	2005	2006	2007	2008	2009	2010	2011	2012	2013	2014	2015	2016
Legacy System Contract	3,919,277	4,057,452	4,544,397	4,841,826	4,673,710	7,112,429	4,883,380	4,670,483	4,671,789	4,694,995	6,640,363	11,465,576	11,875,311
Other Legacy System related costs	446,341	462,077	517,532	551,404	532,259	809,988	556,137	531,891	532,040	534,683	830,393	1,021,647	936,689
Other EDP Maintenance Cost (Non-legacy system related)	563,813	583,690	653,741	696,528	672,343	1,023,168	702,505	671,879	672,067	675,405	1,352,435	1,503,876	1,245,516
<b>EDP Maintenance Total</b>	<b>4,929,431</b>	<b>5,103,219</b>	<b>5,715,670</b>	<b>6,089,758</b>	<b>5,878,312</b>	<b>8,945,586</b>	<b>6,142,022</b>	<b>5,874,253</b>	<b>5,875,896</b>	<b>5,905,082</b>	<b>8,823,191</b>	<b>13,991,098</b>	<b>14,057,516</b>

Projected numbers based on DDRWM FY16 target MOD submission to OB. Please note these numbers are subject to change.

\*Please note that all numbers are subject to change based on 4513 revisions.

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2016 Costs	2016
Legacy System Contract	\$ 12,309,064
Other Legacy System related costs	\$ 772,553
Other EDP Maintenance Cost (Non-legacy system related)	\$ 975,899
<b>EDP Maintenance Total</b>	<b>\$ 14,057,516</b>

Percentage of Change Year over Year		
Year	Costs	Percent
2013	\$ 5,905,082	
2014	\$ 8,823,191	49%
2015	\$ 13,991,099	59%
2016	\$ 14,057,516	0.5%

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National				
National Total	2013	2014	2015	2016
Legacy System Contract	\$ 4,694,995	\$ 6,640,363	\$ 11,465,576	\$ 11,875,311
Other Legacy System related costs	\$ 534,683	\$ 830,393	\$ 1,021,647	\$ 936,689
Other EDP Maintenance Cost (Non-legacy system related)	\$ 675,405	\$ 1,352,435	\$ 1,503,876	\$ 1,245,516
<b>EDP Maintenance Total</b>	<b>\$ 5,905,082</b>	<b>\$ 8,823,191</b>	<b>\$ 13,991,098</b>	<b>\$ 14,057,516</b>
<b>Percentage of Change</b>	Base Year	49%	59%	0%

\*Please note that all numbers are subject to change based on 4513 revisions.

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## Boston Region

<b>Boston Region Total</b>	<b>2013</b>	<b>2014</b>	<b>2015</b>	<b>2016</b>
Legacy System Contract	\$ -	\$ 529,053.33	\$ 1,388,515.91	\$ 1,390,656.61
Other Legacy System related costs	\$ -	\$ 7,810.71	\$ 5,636.09	\$ 13,215.55
Other EDP Maintenance Cost (Non-legacy system related)	\$ -	\$ 212,532.96	\$ -	\$ 11,130.84
<b>EDP Maintenance Total</b>	<b>\$ 531,556.00</b>	<b>\$ 749,397.00</b>	<b>\$ 1,394,152.00</b>	<b>\$ 1,415,003.00</b>
<b>Percentage of Change</b>		41.0%	86.0%	1.5%

<b>Connecticut</b>	<b>2013</b>	<b>2014</b>	<b>2015</b>	<b>2016</b>
Legacy System Contract	\$ -	\$ 141,581.00	\$ 297,869.59	\$ 298,899.11
Other Legacy System related costs	\$ -	\$ 3,525.00	\$ 3,667.41	\$ 5,442.89
Other EDP Maintenance Cost (Non-legacy system related)	\$ -	\$ -	\$ -	\$ -
<b>EDP Maintenance Total</b>	<b>\$ 91,521.00</b>	<b>\$ 145,106.00</b>	<b>\$ 301,537.00</b>	<b>\$ 304,342.00</b>
<b>Percentage of Change</b>		58.5%	107.8%	0.9%

<b>Maine</b>	<b>2013</b>	<b>2014</b>	<b>2015</b>	<b>2016</b>
Legacy System Contract	\$ -	\$ 38,100.00	\$ 123,731.32	\$ 129,000.00
Other Legacy System related costs	\$ -	\$ -	\$ 1,968.68	\$ -
Other EDP Maintenance Cost (Non-legacy system related)	\$ -	\$ -	\$ -	\$ -
<b>EDP Maintenance Total</b>	<b>\$ 37,000.00</b>	<b>\$ 38,100.00</b>	<b>\$ 125,700.00</b>	<b>\$ 129,000.00</b>
<b>Percentage of Change</b>		3.0%	229.9%	2.6%

<b>Massachusetts</b>	<b>2013</b>	<b>2014</b>	<b>2015</b>	<b>2016</b>
Legacy System Contract	\$ -	\$ -	\$ 341,346.00	\$ 348,392.35
Other Legacy System related costs	\$ -	\$ -	\$ -	\$ 1,492.65
Other EDP Maintenance Cost (Non-legacy system related)	\$ -	\$ 212,046.00	\$ -	\$ -
<b>EDP Maintenance Total</b>	<b>\$ 207,422.00</b>	<b>\$ 212,046.00</b>	<b>\$ 341,346.00</b>	<b>\$ 349,885.00</b>
<b>Percentage of Change</b>		2.2%	61.0%	2.5%

<b>New Hampshire</b>	<b>2013</b>	<b>2014</b>	<b>2015</b>	<b>2016</b>
Legacy System Contract	\$ -	\$ 25,714.29	\$ 94,041.00	\$ 92,815.00
Other Legacy System related costs	\$ -	\$ 4,285.71	\$ -	\$ -
Other EDP Maintenance Cost (Non-legacy system related)	\$ -	\$ -	\$ -	\$ -
<b>EDP Maintenance Total</b>	<b>\$ 27,500.00</b>	<b>\$ 30,000.00</b>	<b>\$ 94,041.00</b>	<b>\$ 92,815.00</b>
<b>Percentage of Change</b>		9.1%	213.5%	-1.3%

<b>Rhode Island</b>	<b>2013</b>	<b>2014</b>	<b>2015</b>	<b>2016</b>
Legacy System Contract	\$ -	\$ 133,665.00	\$ 275,074.00	\$ 279,734.20
Other Legacy System related costs	\$ -	\$ -	\$ -	\$ 1,689.80
Other EDP Maintenance Cost (Non-legacy system related)	\$ -	\$ -	\$ -	\$ -
<b>EDP Maintenance Total</b>	<b>\$ 90,589.00</b>	<b>\$ 133,665.00</b>	<b>\$ 275,074.00</b>	<b>\$ 281,424.00</b>
<b>Percentage of Change</b>		47.6%	105.8%	2.3%

<b>Vermont</b>	<b>2013</b>	<b>2014</b>	<b>2015</b>	<b>2016</b>
Legacy System Contract	\$ -	\$ 189,993.04	\$ 256,454.00	\$ 241,815.94
Other Legacy System related costs	\$ -	\$ -	\$ -	\$ 4,590.22
Other EDP Maintenance Cost (Non-legacy system related)	\$ -	\$ 486.96	\$ -	\$ 11,130.84
<b>EDP Maintenance Total</b>	<b>\$ 77,524.00</b>	<b>\$ 190,480.00</b>	<b>\$ 256,454.00</b>	<b>\$ 257,537.00</b>
<b>Percentage of Change</b>		145.7%	34.6%	0.4%

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## Chicago Region

Chicago Region Total	2013	2014	2015	2016
Legacy System Contract	\$ -	\$ 482,976.57	\$ 1,596,421.95	\$ 2,021,708.98
Other Legacy System related costs	\$ -	\$ 258,477.00	\$ 156,773.07	\$ 148,258.20
Other EDP Maintenance Cost (Non-legacy system related)	\$ -	\$ 226,359.42	\$ 270,816.98	\$ 294,464.82
<b>EDP Maintenance Total</b>	<b>\$ 1,031,095.00</b>	<b>\$ 967,813.00</b>	<b>\$ 2,024,012.00</b>	<b>\$ 2,464,432.00</b>
<b>Percentage of Change</b>		-6.1%	109.1%	21.8%

Illinois	2013	2014	2015	2016
Legacy System Contract	\$ -	\$ -	\$ 186,695.64	\$ 371,909.38
Other Legacy System related costs	\$ -	\$ -	\$ -	\$ -
Other EDP Maintenance Cost (Non-legacy system related)	\$ -	\$ 142,543.00	\$ 47,817.36	\$ 66,855.62
<b>EDP Maintenance Total</b>	<b>\$ 162,453.00</b>	<b>\$ 142,543.00</b>	<b>\$ 234,513.00</b>	<b>\$ 438,765.00</b>
<b>Percentage of Change</b>		-12.3%	64.5%	87.1%

Indiana	2013	2014	2015	2016
Legacy System Contract	\$ -	\$ 200,456.00	\$ 342,192.00	\$ 337,800.00
Other Legacy System related costs	\$ -	\$ -	\$ -	\$ -
Other EDP Maintenance Cost (Non-legacy system related)	\$ -	\$ -	\$ -	\$ -
<b>EDP Maintenance Total</b>	<b>\$ 115,625.00</b>	<b>\$ 200,456.00</b>	<b>\$ 342,192.00</b>	<b>\$ 337,800.00</b>
<b>Percentage of Change</b>		73.4%	70.7%	-1.3%

Michigan	2013	2014	2015	2016
Legacy System Contract		\$ 106,601.78	\$ 110,364.25	\$ 331,116.98
Other Legacy System related costs		\$ 798.26	\$ 22,301.40	\$ 50,787.98
Other EDP Maintenance Cost (Non-legacy system related)		\$ 56,886.96	\$ 69,971.35	\$ 79,515.04
<b>EDP Maintenance Total</b>	<b>\$ 154,237.00</b>	<b>\$ 164,287.00</b>	<b>\$ 202,637.00</b>	<b>\$ 461,420.00</b>
<b>Percentage of Change</b>		6.5%	23.3%	127.7%

Minnesota	2013	2014	2015	2016
Legacy System Contract		\$ 58,018.41	\$ 183,933.29	\$ 197,897.54
Other Legacy System related costs		\$ 19,306.59	\$ 7,431.65	\$ 13,033.46
Other EDP Maintenance Cost (Non-legacy system related)		\$ -	\$ 18,253.06	\$ -
<b>EDP Maintenance Total</b>	<b>\$ 88,771.00</b>	<b>\$ 77,325.00</b>	<b>\$ 209,618.00</b>	<b>\$ 210,931.00</b>
<b>Percentage of Change</b>		-12.9%	171.1%	0.6%

Ohio	2013	2014	2015	2016
Legacy System Contract		\$ -	\$ 376,045.35	\$ 357,936.53
Other Legacy System related costs		\$ 202,930.11	\$ 39,354.97	\$ 35,897.90
Other EDP Maintenance Cost (Non-legacy system related)		\$ 4,980.89	\$ 63,635.69	\$ 81,901.56
<b>EDP Maintenance Total</b>	<b>\$ 311,733.00</b>	<b>\$ 207,911.00</b>	<b>\$ 479,036.00</b>	<b>\$ 475,736.00</b>
<b>Percentage of Change</b>		-33.3%	130.4%	-0.7%

Wisconsin	2013	2014	2015	2016
Legacy System Contract		\$ 117,900.39	\$ 397,191.41	\$ 425,048.54
Other Legacy System related costs		\$ 35,442.04	\$ 87,685.05	\$ 48,538.86
Other EDP Maintenance Cost (Non-legacy system related)		\$ 21,948.58	\$ 71,139.53	\$ 66,192.60
<b>EDP Maintenance Total</b>	<b>\$ 198,276.00</b>	<b>\$ 175,291.00</b>	<b>\$ 556,016.00</b>	<b>\$ 539,780.00</b>
<b>Percentage of Change</b>		-11.6%	217.2%	-2.9%

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## Dallas Region

Dallas Region Total	2013	2014	2015	2016
Legacy System Contract	\$ -	\$ 650,990.00	\$ 1,361,352.00	\$ 1,444,718.25
Other Legacy System related costs	\$ -	\$ 190,995.00	\$ 367,944.00	\$ 335,964.29
Other EDP Maintenance Cost (Non-legacy system related)	\$ -	\$ 115,142.00	\$ 77,176.00	\$ 61,269.46
<b>EDP Maintenance Total</b>	<b>\$ 708,692.00</b>	<b>\$ 957,127.00</b>	<b>\$ 1,806,472.00</b>	<b>\$ 1,841,952.00</b>
<b>Percentage of Change</b>		35.1%	88.7%	2.0%

New Mexico	2013	2014	2015	2016
Legacy System Contract	\$ -	\$ 157,585.00	\$ 318,868.00	\$ 261,272.00
Other Legacy System related costs	\$ -	\$ 2,671.00	\$ 3,488.00	\$ 2,827.00
Other EDP Maintenance Cost (Non-legacy system related)	\$ -	\$ 55,946.00	\$ 35,819.00	\$ 47,781.00
<b>EDP Maintenance Total</b>	<b>\$ 147,051.00</b>	<b>\$ 216,202.00</b>	<b>\$ 358,175.00</b>	<b>\$ 311,880.00</b>
<b>Percentage of Change</b>		47.0%	65.7%	-12.9%

Texas	2013	2014	2015	2016
Legacy System Contract	\$ -	\$ 222,035.00	\$ 437,517.00	\$ 559,005.00
Other Legacy System related costs	\$ -	\$ -	\$ 28,232.00	\$ -
Other EDP Maintenance Cost (Non-legacy system related)	\$ -	\$ 46,792.00	\$ 24,074.00	\$ -
<b>EDP Maintenance Total</b>	<b>\$ 261,252.00</b>	<b>\$ 268,827.00</b>	<b>\$ 489,823.00</b>	<b>\$ 559,005.00</b>
<b>Percentage of Change</b>		2.9%	82.2%	14.1%

Oklahoma	2013	2014	2015	2016
Legacy System Contract	\$ -	\$ 137,879.00	\$ 300,196.00	\$ 287,287.00
Other Legacy System related costs	\$ -	\$ 10,000.00	\$ -	\$ 9,357.00
Other EDP Maintenance Cost (Non-legacy system related)	\$ -	\$ -	\$ -	\$ -
<b>EDP Maintenance Total</b>	<b>\$ 95,607.00</b>	<b>\$ 147,879.00</b>	<b>\$ 300,196.00</b>	<b>\$ 296,644.00</b>
<b>Percentage of Change</b>		54.7%	103.0%	-1.2%

Arkansas	2013	2014	2015	2016
Legacy System Contract	\$ -	\$ 124,078.00	\$ 258,585.00	\$ 289,030.85
Other Legacy System related costs	\$ -	\$ 25,142.00	\$ 41,719.00	\$ 9,127.29
Other EDP Maintenance Cost (Non-legacy system related)	\$ -	\$ 7,485.00	\$ 12,632.00	\$ 6,084.86
<b>EDP Maintenance Total</b>	<b>\$ 95,362.00</b>	<b>\$ 156,705.00</b>	<b>\$ 312,936.00</b>	<b>\$ 304,243.00</b>
<b>Percentage of Change</b>		64.3%	99.7%	-2.8%

Louisiana	2013	2014	2015	2016
Legacy System Contract	\$ -	\$ 9,413.00	\$ 46,186.00	\$ 48,123.40
Other Legacy System related costs	\$ -	\$ 153,182.00	\$ 294,505.00	\$ 314,653.00
Other EDP Maintenance Cost (Non-legacy system related)	\$ -	\$ 4,919.00	\$ 4,651.00	\$ 7,403.60
<b>EDP Maintenance Total</b>	<b>\$ 109,420.00</b>	<b>\$ 167,514.00</b>	<b>\$ 345,342.00</b>	<b>\$ 370,180.00</b>
<b>Percentage of Change</b>		53.1%	106.2%	7.2%

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## Atlanta Region

Atlanta Region Total	2013	2014	2015	2016
Legacy System Contract	\$ -	\$ 1,855,344.65	\$ 2,551,965.52	\$ 2,321,729.67
Other Legacy System related costs	\$ -	\$ 83,272.70	\$ 138,623.18	\$ 195,645.20
Other EDP Maintenance Cost (Non-legacy system related)	\$ -	\$ 337,159.65	\$ 243,568.29	\$ 606,355.13
<b>EDP Maintenance Total</b>	<b>\$ 1,435,486.00</b>	<b>\$ 2,275,777.00</b>	<b>\$ 2,934,157.00</b>	<b>\$ 3,123,730.00</b>
<b>Percentage of Change</b>		58.5%	28.9%	6.5%

Alabama	2013	2014	2015	2016
Legacy System Contract	\$ -	\$ 192,550.47	\$ 381,100.24	\$ 280,483.26
Other Legacy System related costs	\$ -	\$ -	\$ -	\$ 89,006.70
Other EDP Maintenance Cost (Non-legacy system related)	\$ -	\$ 299.53	\$ 299.76	\$ 445.03
<b>EDP Maintenance Total</b>	<b>\$ 168,535.00</b>	<b>\$ 192,850.00</b>	<b>\$ 381,400.00</b>	<b>\$ 369,935.00</b>
<b>Percentage of Change</b>		14.4%	97.8%	-3.0%

Florida	2013	2014	2015	2016
Legacy System Contract	\$ -	\$ 296,509.53	\$ 519,965.84	\$ 487,149.61
Other Legacy System related costs	\$ -	\$ 406.96	\$ -	\$ -
Other EDP Maintenance Cost (Non-legacy system related)	\$ -	\$ 122,650.50	\$ 13,416.16	\$ 125,427.39
<b>EDP Maintenance Total</b>	<b>\$ 178,149.00</b>	<b>\$ 419,567.00</b>	<b>\$ 533,382.00</b>	<b>\$ 612,577.00</b>
<b>Percentage of Change</b>		135.5%	27.1%	14.8%

Georgia	2013	2014	2015	2016
Legacy System Contract	\$ -	\$ 173,579.71	\$ 300,226.92	\$ 342,775.40
Other Legacy System related costs	\$ -	\$ -	\$ -	\$ -
Other EDP Maintenance Cost (Non-legacy system related)	\$ -	\$ 50,267.29	\$ 85,503.08	\$ 65,191.60
<b>EDP Maintenance Total</b>	<b>\$ 246,662.00</b>	<b>\$ 223,847.00</b>	<b>\$ 385,730.00</b>	<b>\$ 407,967.00</b>
<b>Percentage of Change</b>		-9.2%	72.3%	5.8%

Kentucky	2013	2014	2015	2016
Legacy System Contract	\$ -	\$ 373,577.43	\$ 364,874.48	\$ 372,008.06
Other Legacy System related costs	\$ -	\$ 56,230.20	\$ 34,980.38	\$ 47,838.49
Other EDP Maintenance Cost (Non-legacy system related)	\$ -	\$ 140,583.37	\$ 124,091.15	\$ 126,780.45
<b>EDP Maintenance Total</b>	<b>\$ 295,220.00</b>	<b>\$ 570,391.00</b>	<b>\$ 523,946.00</b>	<b>\$ 546,627.00</b>
<b>Percentage of Change</b>		93.2%	-8.1%	4.3%

Mississippi	2013	2014	2015	2016
Legacy System Contract	\$ -	\$ 81,088.22	\$ 113,828.59	\$ 116,879.52
Other Legacy System related costs	\$ -	\$ 6,714.82	\$ 2,966.93	\$ -
Other EDP Maintenance Cost (Non-legacy system related)	\$ -	\$ 23,358.96	\$ 12,761.48	\$ 3,229.48
<b>EDP Maintenance Total</b>	<b>\$ 131,034.00</b>	<b>\$ 111,162.00</b>	<b>\$ 129,557.00</b>	<b>\$ 120,109.00</b>
<b>Percentage of Change</b>		-15.2%	16.5%	-7.3%

<b>North Carolina</b>	<b>2013</b>	<b>2014</b>	<b>2015</b>	<b>2016</b>
Legacy System Contract	\$ -	\$ 322,482.00	\$ 303,965.49	\$ 41,163.39
Other Legacy System related costs	\$ -	\$ -	\$ 13,027.09	\$ 436.01
Other EDP Maintenance Cost (Non-legacy system related)	\$ -	\$ -	\$ 2,605.42	\$ 278,411.60
<b>EDP Maintenance Total</b>	<b>\$ 106,066.00</b>	<b>\$ 322,482.00</b>	<b>\$ 319,598.00</b>	<b>\$ 320,011.00</b>
<b>Percentage of Change</b>		204.0%	-0.9%	0.1%

<b>South Carolina</b>	<b>2013</b>	<b>2014</b>	<b>2015</b>	<b>2016</b>
Legacy System Contract	\$ -	\$ 255,925.39	\$ 314,592.00	\$ 284,135.21
Other Legacy System related costs	\$ -	\$ 14,662.61	\$ -	\$ 15,246.79
Other EDP Maintenance Cost (Non-legacy system related)	\$ -	\$ -	\$ -	
<b>EDP Maintenance Total</b>	<b>\$ 123,426.00</b>	<b>\$ 270,588.00</b>	<b>\$ 314,592.00</b>	<b>\$ 299,382.00</b>
<b>Percentage of Change</b>		119.2%	16.3%	-4.8%

<b>Tennessee</b>	<b>2013</b>	<b>2014</b>	<b>2015</b>	<b>2016</b>
Legacy System Contract	\$ -	\$ 159,631.90	\$ 253,411.97	\$ 397,135.21
Other Legacy System related costs	\$ -	\$ 5,258.10	\$ 87,648.78	\$ 43,117.20
Other EDP Maintenance Cost (Non-legacy system related)	\$ -	\$ -	\$ 4,891.25	\$ 6,869.59
<b>EDP Maintenance Total</b>	<b>\$ 186,394.00</b>	<b>\$ 164,890.00</b>	<b>\$ 345,952.00</b>	<b>\$ 447,122.00</b>
<b>Percentage of Change</b>		-11.5%	109.8%	29.2%

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## Denver Region

Denver Region Total	2013	2014	2015	2016
Legacy System Contract	\$ -	\$ 835,684.01	\$ 866,485.40	\$ 865,548.65
Other Legacy System related costs	\$ -	\$ 1,347.42	\$ 2,789.28	\$ 3,300.53
Other EDP Maintenance Cost (Non-legacy system related)	\$ -	\$ 10,678.56	\$ 16,936.32	\$ 32,821.81
<b>EDP Maintenance Total</b>	<b>\$ 406,515.00</b>	<b>\$ 847,710.00</b>	<b>\$ 886,211.00</b>	<b>\$ 901,671.00</b>
<b>Percentage of Change</b>		108.5%	4.5%	1.7%

Colorado	2013	2014	2015	2016
Legacy System Contract	\$ -	\$ 147,034.00	\$ -	\$ 4,533.00
Other Legacy System related costs	\$ -	\$ -	\$ -	
Other EDP Maintenance Cost (Non-legacy system related)	\$ -	\$ -	\$ -	
<b>EDP Maintenance Total</b>	<b>\$ 136,268.00</b>	<b>\$ 147,034.00</b>	<b>\$ -</b>	<b>\$ 4,533.00</b>
<b>Percentage of Change</b>		7.9%	-100.0%	N/A

Montana	2013	2014	2015	2016
Legacy System Contract	\$ -	\$ 266,111.00	\$ 270,934.74	\$ 279,775.00
Other Legacy System related costs	\$ -	\$ -	\$ -	\$ -
Other EDP Maintenance Cost (Non-legacy system related)	\$ -	\$ -	\$ 862.26	\$ -
<b>EDP Maintenance Total</b>	<b>\$ 87,776.00</b>	<b>\$ 266,111.00</b>	<b>\$ 271,797.00</b>	<b>\$ 279,775.00</b>
<b>Percentage of Change</b>		203.2%	2.1%	2.9%

North Dakota	2013	2014	2015	2016
Legacy System Contract	\$ -	\$ 91,061.91	\$ 104,345.69	\$ 74,262.00
Other Legacy System related costs	\$ -	\$ 1,347.42	\$ 1,408.67	\$ 3,300.53
Other EDP Maintenance Cost (Non-legacy system related)	\$ -	\$ 1,650.66	\$ 5,292.65	\$ 21,453.47
<b>EDP Maintenance Total</b>	<b>\$ 28,090.00</b>	<b>\$ 94,060.00</b>	<b>\$ 111,047.00</b>	<b>\$ 99,016.00</b>
<b>Percentage of Change</b>		234.9%	18.1%	-10.8%

South Dakota	2013	2014	2015	2016
Legacy System Contract	\$ -	\$ 271,267.00	\$ 277,157.00	\$ 285,828.00
Other Legacy System related costs	\$ -	\$ -	\$ -	\$ -
Other EDP Maintenance Cost (Non-legacy system related)	\$ -	\$ -	\$ -	\$ -
<b>EDP Maintenance Total</b>	<b>\$ 88,776.00</b>	<b>\$ 271,267.00</b>	<b>\$ 277,157.00</b>	<b>\$ 285,828.00</b>
<b>Percentage of Change</b>		205.6%	2.2%	3.1%

Utah	2013	2014	2015	2016
Legacy System Contract	\$ -	\$ 32,885.10	\$ 124,047.97	\$ 131,150.65
Other Legacy System related costs	\$ -	\$ -	\$ 1,380.61	\$ -
Other EDP Maintenance Cost (Non-legacy system related)	\$ -	\$ 9,027.90	\$ 10,781.42	\$ 11,368.35
<b>EDP Maintenance Total</b>	<b>\$ 39,080.00</b>	<b>\$ 41,913.00</b>	<b>\$ 136,210.00</b>	<b>\$ 142,519.00</b>
<b>Percentage of Change</b>		7.2%	225.0%	4.6%

Wyoming	2013	2014	2015	2016
Legacy System Contract	\$ -	\$ 27,325.00	\$ 90,000.00	\$ 90,000.00
Other Legacy System related costs	\$ -	\$ -	\$ -	\$ -
Other EDP Maintenance Cost (Non-legacy system related)	\$ -	\$ -	\$ -	\$ -
<b>EDP Maintenance Total</b>	<b>\$ 26,525.00</b>	<b>\$ 27,325.00</b>	<b>\$ 90,000.00</b>	<b>\$ 90,000.00</b>
<b>Percentage of Change</b>		3.0%	229.4%	0.0%

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## Kansas City Region

<b>Kansas City Region Total</b>	<b>2013</b>	<b>2014</b>	<b>2015</b>	<b>2016</b>
Legacy System Contract	\$ -	\$ 317,470.00	\$ 646,939.00	\$ 656,152.00
Other Legacy System related costs	\$ -	\$ -	\$ -	\$ -
Other EDP Maintenance Cost (Non-legacy system related)	\$ -	\$ 36,425.00	\$ 37,980.00	\$ 38,733.00
<b>EDP Maintenance Total</b>	<b>\$ 245,619.00</b>	<b>\$ 353,895.00</b>	<b>\$ 684,919.00</b>	<b>\$ 694,885.00</b>
<b>Percentage of Change</b>		44.1%	93.5%	1.5%

<b>Iowa</b>	<b>2013</b>	<b>2014</b>	<b>2015</b>	<b>2016</b>
Legacy System Contract	\$ -	\$ 158,813.00	\$ 327,163.00	\$ 335,924.00
Other Legacy System related costs	\$ -	\$ -	\$ -	\$ -
Other EDP Maintenance Cost (Non-legacy system related)	\$ -	\$ 33,238.00	\$ 34,415.00	\$ 35,373.00
<b>EDP Maintenance Total</b>	<b>\$ 124,524.00</b>	<b>\$ 192,051.00</b>	<b>\$ 361,578.00</b>	<b>\$ 371,297.00</b>
<b>Percentage of Change</b>		54.2%	88.3%	2.7%

<b>Kansas</b>	<b>2013</b>	<b>2014</b>	<b>2015</b>	<b>2016</b>
Legacy System Contract	\$ -	\$ 158,657.00	\$ 319,776.00	\$ 320,228.00
Other Legacy System related costs	\$ -	\$ -	\$ -	\$ -
Other EDP Maintenance Cost (Non-legacy system related)	\$ -	\$ 3,187.00	\$ 3,565.00	\$ 3,360.00
<b>EDP Maintenance Total</b>	<b>\$ 119,602.00</b>	<b>\$ 161,844.00</b>	<b>\$ 323,341.00</b>	<b>\$ 323,588.00</b>
<b>Percentage of Change</b>		35.3%	99.8%	0.1%

<b>Missouri</b>	<b>2013</b>	<b>2014</b>	<b>2015</b>	<b>2016</b>
Legacy System Contract	\$ -	\$ -	\$ -	\$ -
Other Legacy System related costs	\$ -	\$ -	\$ -	\$ -
Other EDP Maintenance Cost (Non-legacy system related)	\$ -	\$ -	\$ -	\$ -
<b>EDP Maintenance Total</b>	<b>\$ 1,493.00</b>	<b>\$ -</b>	<b>\$ -</b>	<b>\$ -</b>
<b>Percentage of Change</b>		N/A	N/A	N/A

<b>Nebraska</b>	<b>2013</b>	<b>2014</b>	<b>2015</b>	<b>2016</b>
Legacy System Contract	\$ -	\$ -	\$ -	\$ -
Other Legacy System related costs	\$ -	\$ -	\$ -	\$ -
Other EDP Maintenance Cost (Non-legacy system related)	\$ -	\$ -	\$ -	\$ -
<b>EDP Maintenance Total</b>	<b>\$ -</b>	<b>\$ -</b>	<b>\$ -</b>	<b>\$ -</b>
<b>Percentage of Change</b>		N/A	N/A	N/A

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## New York Region

New York Region Total	2013	2014	2015	2016
Legacy System Contract	\$ -	\$ 351,836.75	\$ 601,869.06	\$ 905,578.70
Other Legacy System related costs	\$ -	\$ 54,313.25	\$ 9,825.91	\$ 7,676.14
Other EDP Maintenance Cost (Non-legacy system related)	\$ -	\$ -	\$ 7,787.03	\$ 2,495.17
<b>EDP Maintenance Total</b>	<b>\$ 264,919.00</b>	<b>\$ 406,150.00</b>	<b>\$ 619,482.00</b>	<b>\$ 915,750.00</b>
<b>Percentage of Change</b>		53.3%	52.5%	47.8%

New Jersey	2013	2014	2015	2016
Legacy System Contract	\$ -	\$ 280,220.28	\$ 334,005.00	\$ 620,169.00
Other Legacy System related costs	\$ -	\$ 34,630.72	\$ -	\$ -
Other EDP Maintenance Cost (Non-legacy system related)	\$ -	\$ -	\$ -	\$ -
<b>EDP Maintenance Total</b>	<b>\$ 149,088.00</b>	<b>\$ 314,851.00</b>	<b>\$ 334,005.00</b>	<b>\$ 620,169.00</b>
<b>Percentage of Change</b>		111.2%	6.1%	85.7%

New York	2013	2014	2015	2016
Legacy System Contract	\$ -	\$ -	\$ -	\$ -
Other Legacy System related costs	\$ -	\$ -	\$ -	\$ -
Other EDP Maintenance Cost (Non-legacy system related)	\$ -	\$ -	\$ -	\$ -
<b>EDP Maintenance Total</b>	<b>\$ -</b>	<b>\$ -</b>	<b>\$ -</b>	<b>\$ -</b>
<b>Percentage of Change</b>	N/A	N/A	N/A	N/A

Puerto Rico	2013	2014	2015	2016
Legacy System Contract	\$ -	\$ 71,616.47	\$ 267,864.06	\$ 285,409.70
Other Legacy System related costs	\$ -	\$ 19,682.53	\$ 9,825.91	\$ 7,676.14
Other EDP Maintenance Cost (Non-legacy system related)	\$ -	\$ -	\$ 7,787.03	\$ 2,495.17
<b>EDP Maintenance Total</b>	<b>\$ 115,831.00</b>	<b>\$ 91,299.00</b>	<b>\$ 285,477.00</b>	<b>\$ 295,581.00</b>
<b>Percentage of Change</b>		-21.2%	212.7%	3.5%

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## Philadelphia Region

Philadelphia Region Total	2013	2014	2015	2016
Legacy System Contract	\$ -	\$ 735,874.71	\$ 993,457.06	\$ 914,017.74
Other Legacy System related costs	\$ -	\$ 179,665.66	\$ 194,327.79	\$ 201,261.09
Other EDP Maintenance Cost (Non-legacy system related)	\$ -	\$ 31,946.63	\$ 468,644.14	\$ 57,261.17
<b>EDP Maintenance Total</b>	<b>\$ 655,611.00</b>	<b>\$ 947,487.00</b>	<b>\$ 1,656,429.00</b>	<b>\$ 1,172,540.00</b>
<b>Percentage of Change</b>		44.5%	74.8%	-29.2%

Delaware	2013	2014	2015	2016
Legacy System Contract	\$ -	\$ -	\$ -	\$ -
Other Legacy System related costs	\$ -	\$ -	\$ -	\$ -
Other EDP Maintenance Cost (Non-legacy system related)	\$ -	\$ -	\$ -	\$ -
<b>EDP Maintenance Total</b>	<b>\$ -</b>	<b>\$ -</b>	<b>\$ -</b>	<b>\$ -</b>
<b>Percentage of Change</b>	N/A	N/A	N/A	N/A

DC	2013	2014	2015	2016
Legacy System Contract	\$ -	\$ 105,580.64	\$ 303,521.10	\$ 4,110.60
Other Legacy System related costs	\$ -	\$ 4,800.36	\$ 5,200.88	\$ 152.02
Other EDP Maintenance Cost (Non-legacy system related)	\$ -	\$ -	\$ 3,470.03	\$ 44.38
<b>EDP Maintenance Total</b>	<b>\$ 84,682.00</b>	<b>\$ 110,381.00</b>	<b>\$ 312,192.00</b>	<b>\$ 4,307.00</b>
<b>Percentage of Change</b>		30.3%	182.8%	-98.6%

Maryland	2013	2014	2015	2016
Legacy System Contract	\$ -	\$ 95,713.01	\$ 281,565.84	\$ 272,610.17
Other Legacy System related costs	\$ -	\$ -	\$ -	\$ -
Other EDP Maintenance Cost (Non-legacy system related)	\$ -	\$ 6,536.99	\$ 7,646.16	\$ 10,534.83
<b>EDP Maintenance Total</b>	<b>\$ 124,905.00</b>	<b>\$ 102,250.00</b>	<b>\$ 289,212.00</b>	<b>\$ 283,145.00</b>
<b>Percentage of Change</b>		-18.1%	182.8%	-2.1%

Pennsylvania	2013	2014	2015	2016
Legacy System Contract	\$ -	\$ 240,870.90	\$ 76,714.98	\$ 105,717.38
Other Legacy System related costs	\$ -	\$ 146,077.10	\$ 91,771.91	\$ 178,460.50
Other EDP Maintenance Cost (Non-legacy system related)	\$ -	\$ -	\$ 219,618.11	\$ 21,214.12
<b>EDP Maintenance Total</b>	<b>\$ 275,305.00</b>	<b>\$ 386,948.00</b>	<b>\$ 388,105.00</b>	<b>\$ 305,392.00</b>
<b>Percentage of Change</b>		40.6%	0.3%	-21.3%

Virginia	2013	2014	2015	2016
Legacy System Contract	\$ -	\$ 243,230.38	\$ 81,382.06	\$ 277,517.08
Other Legacy System related costs	\$ -	\$ 4,873.58	\$ 97,355.00	\$ 22,648.57
Other EDP Maintenance Cost (Non-legacy system related)	\$ -	\$ 22,135.04	\$ 232,978.93	\$ 20,440.36
<b>EDP Maintenance Total</b>	<b>\$ 97,771.00</b>	<b>\$ 270,239.00</b>	<b>\$ 411,716.00</b>	<b>\$ 320,606.00</b>
<b>Percentage of Change</b>		176.4%	52.4%	-22.1%

West Virginia	2013	2014	2015	2016
Legacy System Contract	\$ -	\$ 50,479.78	\$ 250,273.08	\$ 254,062.51
Other Legacy System related costs	\$ -	\$ 23,914.62	\$ -	\$ -
Other EDP Maintenance Cost (Non-legacy system related)	\$ -	\$ 3,274.60	\$ 4,930.92	\$ 5,027.49
<b>EDP Maintenance Total</b>	<b>\$ 72,948.00</b>	<b>\$ 77,669.00</b>	<b>\$ 255,204.00</b>	<b>\$ 259,090.00</b>
<b>Percentage of Change</b>		6.5%	228.6%	1.5%

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## San Francisco Region

San Francisco Region Total	2013	2014	2015	2016
Legacy System Contract	\$ -	\$ 390,466.46	\$ 712,657.43	\$ 536,181.20
Other Legacy System related costs	\$ -	\$ 35,783.38	\$ 118,209.62	\$ 15,162.57
Other EDP Maintenance Cost (Non-legacy system related)	\$ -	\$ 332,366.16	\$ 153,806.95	\$ 6,901.23
<b>EDP Maintenance Total</b>	<b>\$ 284,073.00</b>	<b>\$ 758,616.00</b>	<b>\$ 984,674.00</b>	<b>\$ 558,245.00</b>
<b>Percentage of Change</b>		167.0%	29.8%	-43.3%

Arizona	2013	2014	2015	2016
Legacy System Contract		\$ 283,786.45	\$ 378,687.54	\$ 312,409.90
Other Legacy System related costs		\$ 20,432.39	\$ -	\$ 2,972.10
Other EDP Maintenance Cost (Non-legacy system related)		\$ 946.16	\$ 15,676.46	\$ -
<b>EDP Maintenance Total</b>	<b>\$ 133,590.00</b>	<b>\$ 305,165.00</b>	<b>\$ 394,364.00</b>	<b>\$ 315,382.00</b>
<b>Percentage of Change</b>		128.4%	29.2%	-20.0%

California	2013	2014	2015	2016
Legacy System Contract		\$ -	\$ -	\$ -
Other Legacy System related costs		\$ -	\$ 67,588.31	\$ -
Other EDP Maintenance Cost (Non-legacy system related)		\$ 286,536.00	\$ 128,595.69	\$ -
<b>EDP Maintenance Total</b>	<b>\$ 83,954.00</b>	<b>\$ 286,536.00</b>	<b>\$ 196,184.00</b>	<b>\$ -</b>
<b>Percentage of Change</b>		241.3%	-31.5%	-100.0%

Hawaii	2013	2014	2015	2016
Legacy System Contract	\$ -	\$ 106,680.01	\$ 94,629.46	\$ 91,859.61
Other Legacy System related costs	\$ -	\$ 15,350.99	\$ 5,251.94	\$ 12,190.47
Other EDP Maintenance Cost (Non-legacy system related)	\$ -	\$ -	\$ 3,364.60	\$ 4,818.91
<b>EDP Maintenance Total</b>	<b>\$ 27,445.00</b>	<b>\$ 122,031.00</b>	<b>\$ 103,246.00</b>	<b>\$ 108,869.00</b>
<b>Percentage of Change</b>		344.6%	-15.4%	5.4%

Nevada	2013	2014	2015	2016
Legacy System Contract		\$ -	\$ 239,340.43	\$ 131,911.68
Other Legacy System related costs		\$ -	\$ 45,369.37	\$ -
Other EDP Maintenance Cost (Non-legacy system related)		\$ 44,884.00	\$ 6,170.20	\$ 2,082.32
<b>EDP Maintenance Total</b>	<b>\$ 39,084.00</b>	<b>\$ 44,884.00</b>	<b>\$ 290,880.00</b>	<b>\$ 133,994.00</b>
<b>Percentage of Change</b>		14.8%	548.1%	-53.9%

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## Seattle Region

Seattle Region Total	2013	2014	2015	2016
Legacy System Contract	\$ -	\$ 490,666.59	\$ 745,912.36	\$ 819,019.37
Other Legacy System related costs	\$ -	\$ 18,728.28	\$ 27,517.81	\$ 16,205.75
Other EDP Maintenance Cost (Non-legacy system related)	\$ -	\$ 49,824.12	\$ 227,159.83	\$ 134,082.88
<b>EDP Maintenance Total</b>	<b>\$ 341,516.00</b>	<b>\$ 559,219.00</b>	<b>\$ 1,000,590.00</b>	<b>\$ 969,308.00</b>
<b>Percentage of Change</b>		63.7%	78.9%	-3.1%

Alaska	2013	2014	2015	2016
Legacy System Contract		\$ -	\$ -	\$ -
Other Legacy System related costs		\$ -	\$ -	\$ -
Other EDP Maintenance Cost (Non-legacy system related)		\$ -	\$ -	\$ -
<b>EDP Maintenance Total</b>	<b>\$ -</b>	<b>\$ -</b>	<b>\$ -</b>	<b>\$ -</b>
<b>Percentage of Change</b>		N/A	N/A	N/A

Idaho	2013	2014	2015	2016
Legacy System Contract		\$ 111,868.00	\$ 315,312.00	\$ 330,699.25
Other Legacy System related costs		\$ -	\$ -	\$ 16,205.75
Other EDP Maintenance Cost (Non-legacy system related)		\$ -	\$ -	\$ -
<b>EDP Maintenance Total</b>	<b>\$ 85,439.00</b>	<b>\$ 111,868.00</b>	<b>\$ 315,312.00</b>	<b>\$ 346,905.00</b>
<b>Percentage of Change</b>		30.9%	181.9%	10.0%

Oregon	2013	2014	2015	2016
Legacy System Contract		\$ 56,201.72	\$ 63,292.03	\$ 114,118.00
Other Legacy System related costs		\$ 18,728.28	\$ 15,278.31	\$ -
Other EDP Maintenance Cost (Non-legacy system related)		\$ -	\$ 59,724.66	\$ -
<b>EDP Maintenance Total</b>	<b>\$ 70,115.00</b>	<b>\$ 74,930.00</b>	<b>\$ 138,295.00</b>	<b>\$ 114,118.00</b>
<b>Percentage of Change</b>		6.9%	84.6%	-17.5%

Washington	2013	2014	2015	2016
Legacy System Contract		\$ 322,596.88	\$ 367,308.33	\$ 374,202.12
Other Legacy System related costs		\$ -	\$ 12,239.50	\$ -
Other EDP Maintenance Cost (Non-legacy system related)		\$ 49,824.12	\$ 167,435.17	\$ 134,082.88
<b>EDP Maintenance Total</b>	<b>\$ 185,962.00</b>	<b>\$ 372,421.00</b>	<b>\$ 546,983.00</b>	<b>\$ 508,285.00</b>
<b>Percentage of Change</b>		100.3%	46.9%	-7.1%

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States with percentage increases above 200	
2014	
North Carolina	204.0%
Montana	203.2%
North Dakota	234.9%
South Dakota	205.6%
California	241.3%
Hawaii	344.6%
2015	
Maine	229.9%
New Hampshire	213.5%
Puerto Rico	212.7%
West Virginia	228.6%
Wisconsin	217.2%
Utah	225.0%
Wyoming	229.4%
Nevada	548.1%

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# Vision 2025 Roadmap: The *What* and *How* of Realizing Vision 2025

Developed for:  
Social Security Administration  
Office of the Chief Strategic Officer  
January 18, 2016



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## Preface

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This document outlines what initiatives are necessary to realize Vision 2025 and recommends the steps SSA should take to implement these initiatives.

**Section 1: Vision Roadmap** (*what needs to change*)

Describes SSA's desired outcomes of Vision 2025, and provides an overview of current transformational SSA initiatives that will help the agency realize the Vision, as well as recommended transformational initiatives based on gaps in SSA's current initiatives. Together, the current and recommended transformational initiatives provide an updated Vision Roadmap that charts SSA's path over the next 10 years.

**Section 2: Vision Roadmap Execution Strategy** (*how to realize the change*)

Describes key next steps to establish the structure and accountability needed to manage SSA's transformational initiatives.

The contents of this document includes change management principles and tactics, and provides a set of tools and strategies that position SSA to successfully realize Vision 2025.

# SSA must continue to serve its customers throughout their lifetime, when and where they need them\*

1935



The Social Security Program was established through President Roosevelt's signing of the Social Security Act



Social Security's mission was to serve as a social insurance system covering all major personal economic hazards with special emphasis on unemployment and old age insurance

2015

SSA has evolved into an agency that:



Employs **65 thousand people**



Provides **one trillion dollars** in annual benefits and financial protection



Directs benefits to **65 million people**



39 million  
retired workers



4 million  
children



4 million  
survivors



Medicare  
beneficiaries

Over the next 10 years, SSA's beneficiaries are projected to **increase by 32%\*\***, while **one-third\*\*\*** of its workforce is due to retire, leaving a knowledge gap

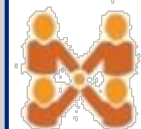


2025

Vision 2025 is the first step and a call to action to preserve and fulfill the agency's social contract which set its foundation 80 years ago



**Superior  
Customer  
Experience**



**Exceptional  
Employees**



**Innovative  
Organization**

# Section One: Vision Roadmap



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## Vision Roadmap Overview

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The **Vision Roadmap** explains how the Social Security Administration (SSA) should pursue and **achieve the aspirations** identified in its Vision 2025 narrative.

Deloitte based **Version One** of the roadmap on detailed **external research**, conversations with Deloitte subject matter experts, an initial analysis of current SSA initiatives, and some **SSA employee and external constituent feedback**. Deloitte then conducted a more **in-depth analysis** of current initiatives and **extensive feedback** from employees across the country to develop **Version Two** of the roadmap.

The level of uncertainty around the **recommended initiatives** increases as ones moves further along the roadmap; therefore, the intent is not to prescribe SSA with all the right answers, but rather to **show SSA how it can transform**. It is important SSA complements this proposed approach by **monitoring changing trends and adapting its strategy** and pace accordingly.

.



# In April 2015, SSA launched a bold 10-year Vision, which includes an ambitious set of priorities to better serve its customers

## Vision 2025 Priorities

### Superior Customer Experience



In 2025, we are focused on understanding the customer's experience over their lifetime. Through this understanding, we respond to and anticipate our customers' needs, and thoughtfully craft appropriate service options.

### Exceptional Employees



In 2025, we attract top talent and support our employees through developmental opportunities, active engagement, and empowerment to make decisions. Our employees reflect the "heart of the agency," providing a high-quality, personalized customer experience through compassion and dedication to our mission.

### Innovative Organization



In 2025, we are recognized by the public and across government for our agility and effectiveness in fulfilling our mission. We meet the changing needs of our customers and keep pace with the transitions they experience in their lives.

# SSA developed goals to realize the Vision's priorities



## Superior Customer Experience

*SSA delivers a customer experience that meets or exceeds service expectations*



## Exceptional Employees

*Every SSA employee operates in a flexible and highly-engaging working environment that supports and develops them in providing quality customer service*



## Innovative Organization

*SSA is an adaptive organization that embraces changes to meet the future needs of its customers and employees*

### **Illustrative measures\* include:**

*Forrester's Customer Experience Index\*\**

*OPM Employee Engagement Index*

*An organizational efficiency index\*\**

### **Achieving these goals means SSA will:**

- Provide **superior customer service to** customers (including individuals, businesses, government agencies, and private corporations)
- Empower its employees with the knowledge and tools to **consistently meet customer expectations** through quality service
- Create an environment where employees are aligned and directly **contribute to SSA's mission**
- Adapt its operating model to **quickly respond** to changing environmental factors and customer and employee needs

# Realizing the Vision priorities will require action across nine objectives\*

Vision Priorities



## Superior Customer Experience

*SSA delivers a customer experience that meets or exceeds service expectations*

### Vision Objectives

#### Consolidated Customer Experience Management

SSA transforms its ability to direct all customer experience improvement efforts and develops a deep understanding of all customers.

#### Omni-Channel Customer Experience

SSA improves the quality of its existing service channels, develops new service channels, and integrates all channels to provide a seamless experience across channels and services.

#### Customer Empowerment and Choice

SSA provides customers with the services that are critical to them and empowers them to interact with SSA in the manner that they choose.



## Exceptional Employees

*Every SSA employee operates in a flexible and highly-engaging working environment that supports and develops them in providing quality customer service*

### Vision Objectives

#### Employee Engagement

SSA has a deep understanding of what motivates employees and rolls out cultural change initiatives to increase employees' involvement.

#### Employee Development

SSA prioritizes employee development through development plans, access to compelling learning and development opportunities, and a culture of knowledge-sharing.

#### Employee Empowerment

SSA has a work environment that provides employees with the flexibility and authority to make a tangible impact on their work environment and SSA's mission.



## Innovative Organization

*SSA is an adaptive organization that embraces changes to meet the future needs of its customers and employees*

### Vision Objectives

#### Continuous Improvement

SSA has established feedback and improvement mechanisms that are driven by data and inform advancement of SSA's processes, policies, and programs.

#### Adaptive Culture

SSA has an organizational structure and leadership team that recognizes, adapts, and develops change in innovative and impactful ways.

#### Customer-Centric Infrastructure

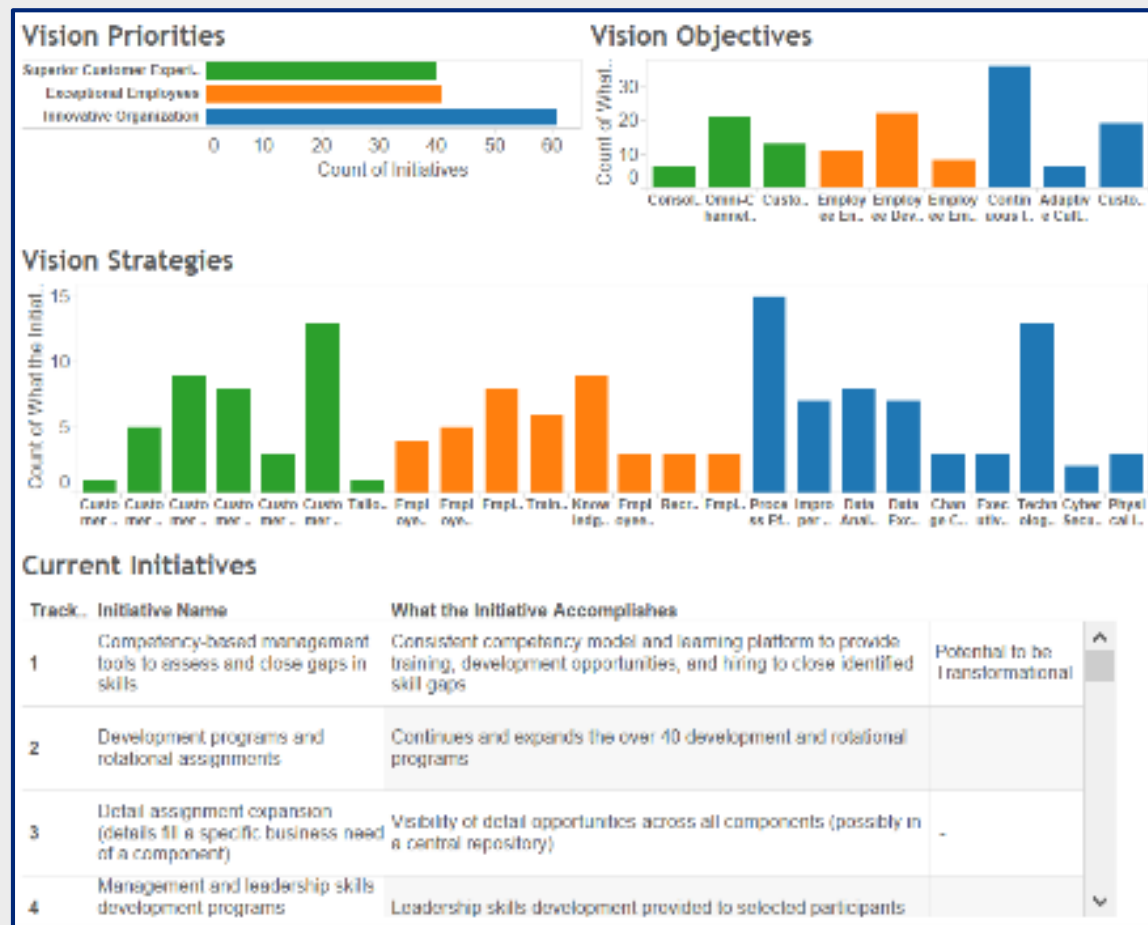
SSA has modernized, secure, and flexible IT and physical infrastructures that are driven by customer need and aim to meet or exceed customer expectations.

# SSA already invests in many initiatives across these nine objectives

## Current Initiatives

**142** current initiatives aligned to Vision 2025

**51** with potential to be transformational



## SSA's Critical Eight

(included in dashboard)

- Enhance Online Services
- Reduce the Wait for a Hearing Decision
- Educate the Public about Social Security Programs
- Improve Succession Planning
- Promote Employee Development and Employee Engagement
- Transform the IT Investment Process
- Establish the Enterprise Program Management Office
- Accelerate the Use of Data-Driven decision-making

*We developed an interactive dashboard that allows users to see the alignment of current initiatives to the Vision*

# But gaps still remain to realize Vision 2025

**We developed outcomes for the vision objectives**



**We determined current initiatives that support vision objectives**



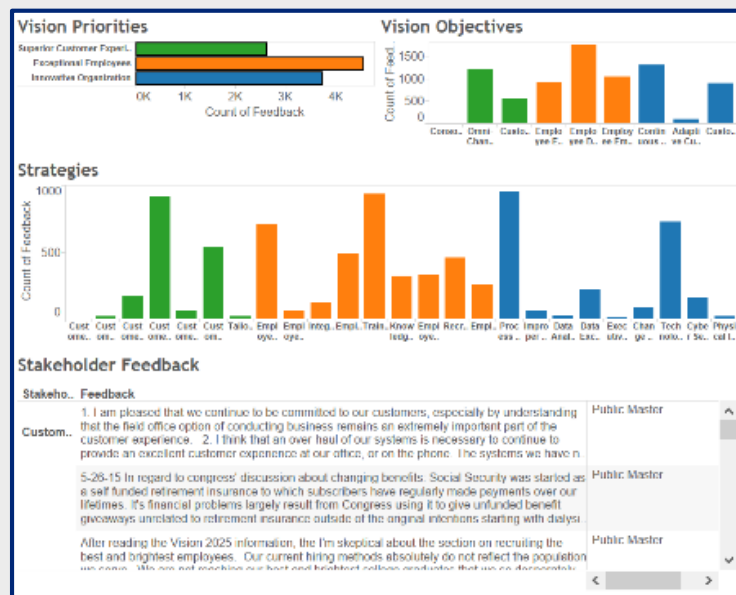
**We compared the current initiatives to the vision objectives to determine the gaps**



# We analyzed stakeholder\* input and leading practices to develop recommended initiatives

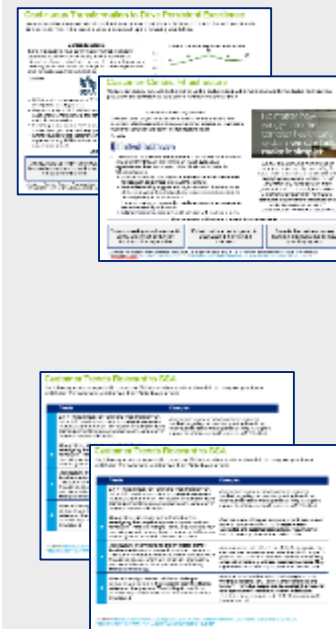
## Stakeholder Input

**Over 10,500\*\*** responses with thoughts and recommendations aligned to Vision 2025



We developed an interactive dashboard that allows users to see the alignment of stakeholder input to the Vision

## External Organization Research\*\*\*



41

cases of organizations that have undergone similar transformational change

59

trends in the external environment for customers, employees, and organizations

12 \* Stakeholders include: employees, customers, and external constituents (e.g., advocacy and congressional groups); SSA collected feedback representing over 29,000 employees

\*\* 10,500 inputs refer to the number of unique responses that align to a Vision priority in the stakeholder feedback spreadsheet

\*\*\* Refer to Appendix B for external research on case studies and trends

# Current initiatives, recommended initiatives from stakeholder\* input, and leading practices form the Vision Roadmap

Tracking #	Initiative Name	What the Initiative Accomplishes	End
10	Anti-fraud infrastructure	Strengthen anti-fraud program, office, and committee	2025
11	Anti-fraud system architecture	Customer benefit of fraud detection and prevention to fraud	2025
12	Beneficiary payment and reporting	Streamline processes, improve beneficiary payment, and reporting to improve the accuracy and timeliness of benefit payments	2025
13	Business continuity	Disaster threat and abuse detection and prevention	2025
14	Customer engagement strategy	Recognize employee accomplishments across competency	2025
15	Rewards and recognition	Equip employees with online tools for improving engagement and retention	2025
16	Employee engagement toolkit	Develop employee engagement tools (TTC) across	2025
17	Customer Channel Improvement	Improve customer in field office through SSP software	2025
18	Queueing system improvements	Improve to reduce and social security statements including technology capabilities	2025
19	Customer communications improvements	Customer web-based system for easier use and increase the quality of disability decisions through providing current information about specific job requirements	2025
20	Occupational information system	Customer and maintain electronic information technology systems that provide disability beneficiaries access to a self-directed employment support structure	2025
21	Returns to work online information system	Improve self service options in field offices	2025
22	Self-help PC enhancements	Enables credit card payments in field offices	2025
23	Social security electronic remittance system	Examines the performance of employment networks through regular contact and site visits and determines improvements	2025
24	Improving employment support programs	Seeks to identify methods to reduce hearing wait times to an average of 75 days without conflicting customer	2025
25	Critical Flight: Reduce the Wait for a Hearing Decision		2025

## Current Initiatives

Initiatives currently underway that support realizing the Vision



## Stakeholder Inputs

Ideas and recommendations from stakeholders for SSA changes needed



## External Research

Case studies and trends for how other organizations achieved transformation

SSA Vision 2025 - Vision Roadmap January 2016			
Area	Initiative	Impact	Timeline
Customer Service	Improve customer service through digital transformation	Reduce wait times, improve customer satisfaction	2016-2025
Employee Engagement	Improve employee engagement through digital transformation	Reduce wait times, improve employee satisfaction	2016-2025
Business Process	Improve business process through digital transformation	Reduce wait times, improve business process	2016-2025
Technology	Improve technology through digital transformation	Reduce wait times, improve technology	2016-2025
Security	Improve security through digital transformation	Reduce wait times, improve security	2016-2025
Compliance	Improve compliance through digital transformation	Reduce wait times, improve compliance	2016-2025
Infrastructure	Improve infrastructure through digital transformation	Reduce wait times, improve infrastructure	2016-2025
Human Resources	Improve human resources through digital transformation	Reduce wait times, improve human resources	2016-2025
Finance	Improve finance through digital transformation	Reduce wait times, improve finance	2016-2025
Legal	Improve legal through digital transformation	Reduce wait times, improve legal	2016-2025
Public Affairs	Improve public affairs through digital transformation	Reduce wait times, improve public affairs	2016-2025
Information Management	Improve information management through digital transformation	Reduce wait times, improve information management	2016-2025
Customer Service	Improve customer service through digital transformation	Reduce wait times, improve customer service	2016-2025
Employee Engagement	Improve employee engagement through digital transformation	Reduce wait times, improve employee engagement	2016-2025
Business Process	Improve business process through digital transformation	Reduce wait times, improve business process	2016-2025
Technology	Improve technology through digital transformation	Reduce wait times, improve technology	2016-2025
Security	Improve security through digital transformation	Reduce wait times, improve security	2016-2025
Compliance	Improve compliance through digital transformation	Reduce wait times, improve compliance	2016-2025
Infrastructure	Improve infrastructure through digital transformation	Reduce wait times, improve infrastructure	2016-2025
Human Resources	Improve human resources through digital transformation	Reduce wait times, improve human resources	2016-2025
Finance	Improve finance through digital transformation	Reduce wait times, improve finance	2016-2025
Legal	Improve legal through digital transformation	Reduce wait times, improve legal	2016-2025
Public Affairs	Improve public affairs through digital transformation	Reduce wait times, improve public affairs	2016-2025
Information Management	Improve information management through digital transformation	Reduce wait times, improve information management	2016-2025

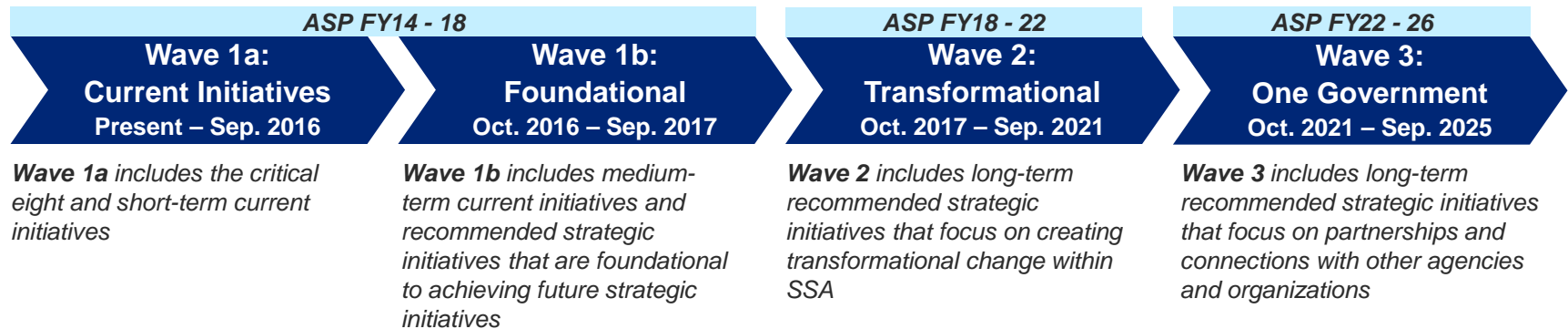
## Vision Roadmap

Series of initiatives that address SSA gaps to realize Vision 2025



# The Vision Roadmap structures initiatives through waves aligned to Agency Strategic Plans (ASPs)

While “one government” – connecting government services across agencies – is listed in wave three, SSA may be able to work with other agencies on this goal sooner, depending on the type of initiative and coordination required.



SSA should follow a **repeatable process, within and across waves**, to:

- **Establish** a strong foundation to support transformation
- **Develop** a plan to test and expand the transformation initiatives
- **Pilot** the transformation initiatives with targeted services, channels, and/or customer segments
- Leverage the results of the pilot to **revise** the plan
- **Scale** the initiatives to other parts of SSA and across government, where applicable, promoting a risk-aware culture that supports a one-government philosophy

We recommend SSA monitor trends and think continuously about the “art of the possible.” The four-year ASP cycle allows for a refresh of initiatives and priorities to adapt the pace of transformation.



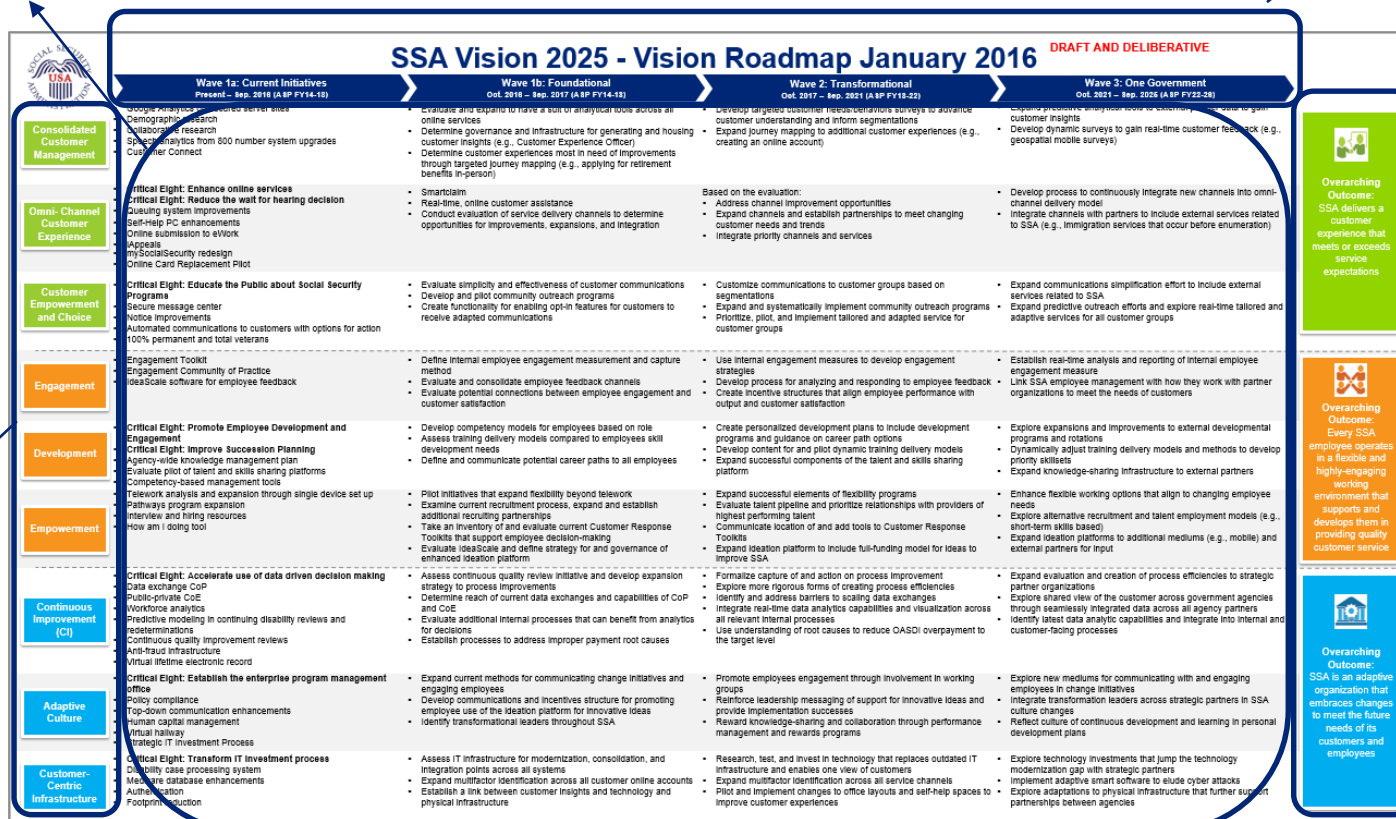
# The Vision Roadmap sequences the activities SSA should undertake over the next 10 years

The initiatives on the Vision Roadmap only include those that we believe will have a significant impact on realizing the Vision and are truly transformational.

## Vision 2025 Roadmap January 2016

**79 Recommended and 51 Current Transformational initiatives\*** are aligned by objective and define the activities SSA should undertake

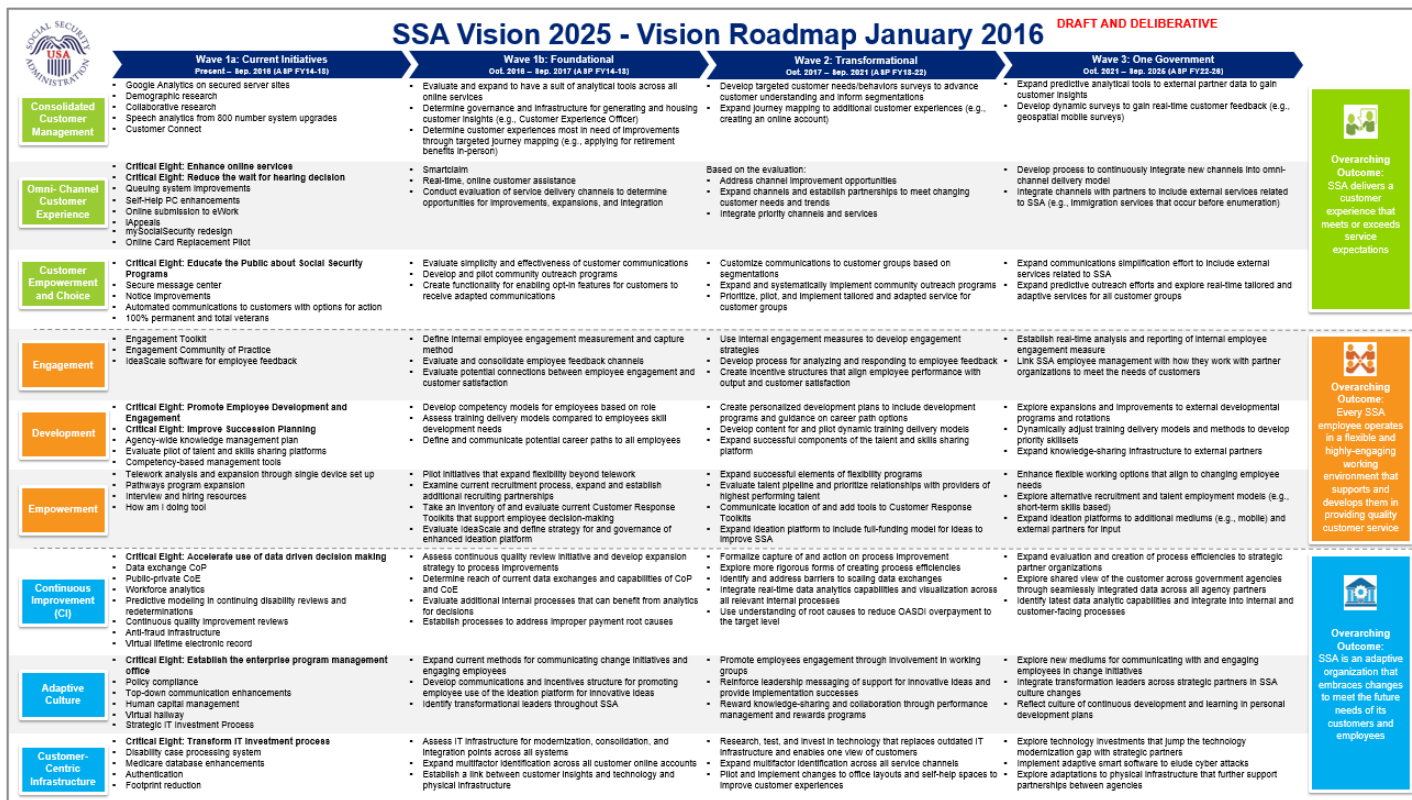
**Vision Waves**  
aligned to ASPs



**Vision Objectives** represent the focus areas for each of the Vision priorities

**Vision Goals** represent the overarching 10-year goal for each Vision priority (one per priority)

# Vision Roadmap



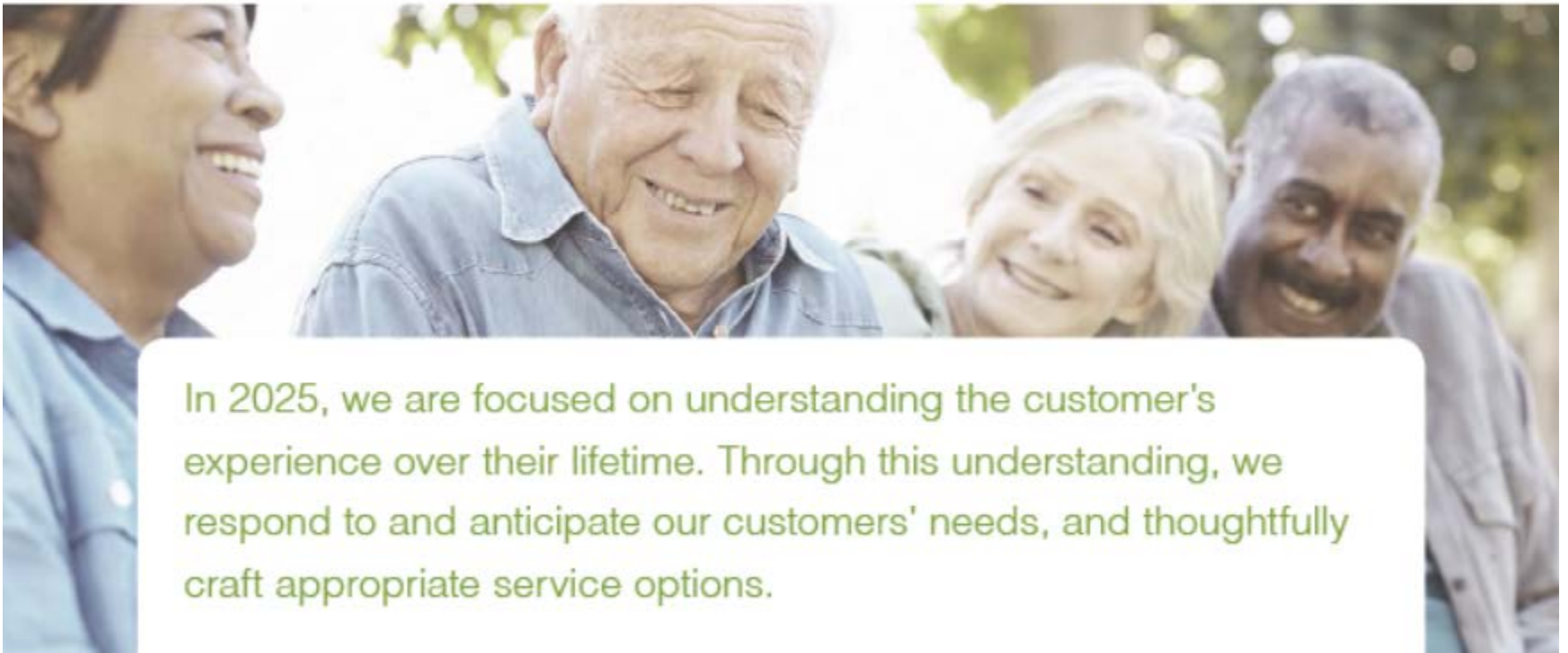
Please click on the PDF to view  
the full Vision Roadmap:



Adobe Acrobat  
Document



## Superior Customer Experience



In 2025, we are focused on understanding the customer's experience over their lifetime. Through this understanding, we respond to and anticipate our customers' needs, and thoughtfully craft appropriate service options.

# SSA set bold objectives for providing superior customer experience



## Superior Customer Experience:

*SSA delivers a customer experience that meets or exceeds service expectations*

### Vision Objectives



#### Consolidated Customer Experience Management

SSA transforms its ability to direct all customer experience improvement efforts and develops a deep understanding of all customers.

**By 2025...** SSA has a consolidated management structure for collecting and analyzing customer data across all channels and proactively provides relevant insights from predictive data analysis on customer needs and behaviors to inform decisions made across SSA.



#### Omni-Channel Customer Experience

SSA improves the quality of its existing service channels, develops new service channels, and integrates all channels to provide a seamless experience across channels and services.

**By 2025...** A beneficiary can begin an application for benefits on her smart phone, transition to complete it on her computer without interruption, and if she encounters a problem, call an SSA employee that has access to a live version of her in-progress application.



#### Customer Empowerment and Choice

SSA provides customers with the services that are critical to them and empowers them to interact with SSA in the manner that they choose.

**By 2025...** Individuals applying for benefits receive proactive notifications about their application, have a clear understanding of the process, and receive all of their information online because they have selected that as their desired method of communication.

# We developed strategies and quantifiable outcomes\* for each objective



## Superior Customer Experience:

*SSA delivers a customer experience that meets or exceeds service expectations*

**Overall Measure: Forrester's Customer Experience Index**

## Vision Strategies



### Consolidated Customer Experience Management

- **Customer Experience Management:** Creates a structure for managing customer experience and distributing insights on customer behavior, characteristics, and needs across the agency
- **Customer Data Analytics:** Develops a comprehensive understanding of customer groups through data collection and analysis to respond to and predict customer needs and behaviors

**Outcomes:** SSA has mechanisms to collect data and apply data-driven decisions for customer preferences, behaviors, and needs across all SSA services and channels



### Omni-Channel Customer Experience

- **Customer Channel Improvement:** Enhances customer experience through improvements to existing methods of customer interaction
- **Customer Channel Expansion:** Delivers more services through existing channels or creates new channel options for customer to use
- **Customer Channel Integration:** Links information across multiple channels for seamless customer interactions when switching between channels

**Outcomes:** Customers can interact with all SSA services using a combination of digital, in-person, and self-service channels interchangeably



### Customer Empowerment and Choice

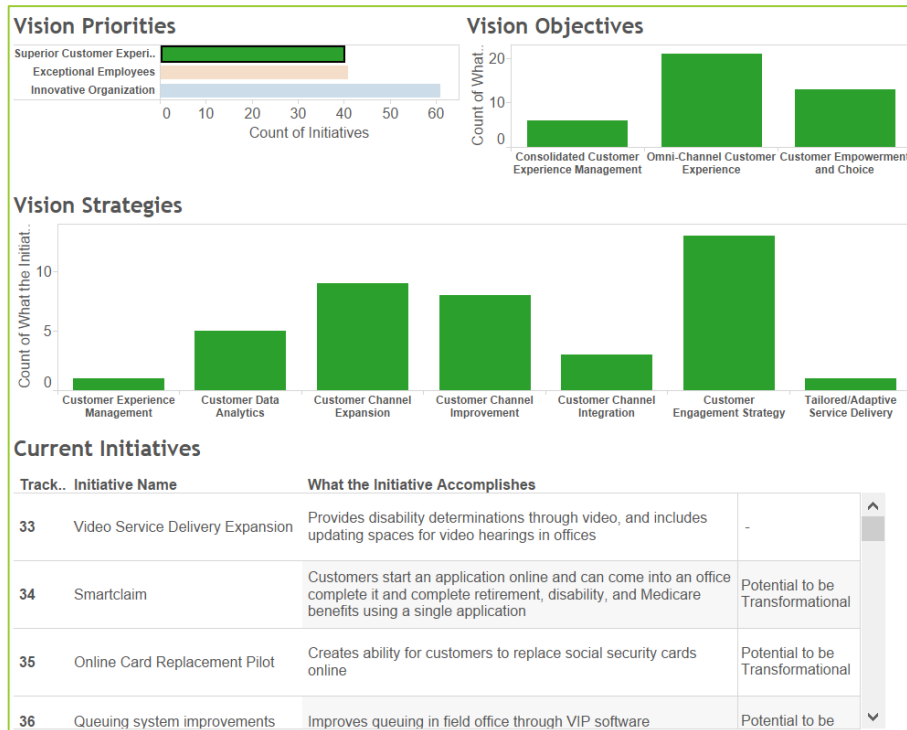
- **Customer Engagement:** Develops a unified strategy for creating and providing information to customers
- **Tailored/Adaptive Service:** Creates personalized outreach and service delivery methods for customers based on customer behaviors, demographics, and service use

**Outcomes:** All customers receive personally tailored information through their preferred channel



# SSA currently invests in many initiatives to achieve these outcomes

## Superior Customer Experience Current Initiative Analysis



*We developed an interactive dashboard that allows users to see the alignment of current initiatives to the Vision.*



### Consolidated customer experience management current initiatives will...

- Establish a **governing body** to manage aspects of customer experiences (e.g., customer connect)
- Develop an **understanding of customer demographics** and **begin to capture customer online behavior** (e.g., Google analytics for secured server sites and demographic research)



### Omni-channel customer experience current initiatives will...

- Improve specific aspects of service delivery** in a channel (e.g., improvements to queuing and self-help options in field offices)
- Expand channels across **online, kiosk, and self-help channels** (e.g., pilot for replacing social security cards online)
- Integrate a few aspects to services** across online, in-person, and telephone support (e.g., Smartclaim allows customers to start a claim online and come into the office to finish)



### Customer empowerment and choice current initiatives will...

- Simplify communications** based on component needs and provide **proactive information on select services** (e.g., notice improvements and proactive automated calling for customers most likely to have returned to work)
- Adapt service delivery to better serve Veterans** (e.g., offers expedited service to veterans for disability processing)

# Gaps remain in realizing these outcomes

## Overarching Superior Customer Experience Gap: Integrating customer experience across all channels seamlessly



### Consolidated Customer Experience Management

**Outcome:** SSA has mechanisms to collect data and apply data-driven decisions for customer preferences, behaviors, and needs across all SSA services and channels

#### Gaps:

- SSA **does not consistently collect, analyze, and use targeted customer data** across all channels **to support decision-making**
- SSA **does not have a mature governance structure** for managing customer insights throughout the agency



### Omni-Channel Customer Experience

**Outcome:** Customers can interact with all SSA services using a combination of digital, in-person, and self-service channels interchangeably

#### Gaps:

- SSA **lacks comprehensive end-to-end evaluation of customer experience across service delivery channels** to inform improvements, expansions, and integrations
- SSA **lacks integration initiatives that provide a seamless experience across services and channels**



### Customer Empowerment and Choice

**Outcome:** All customers receive personally tailored information through their preferred channel

#### Gaps:

- SSA **does not consistently use customer data analytics to develop personalized service delivery for customers**
- SSA's communications **are not always simple and clear** for customers or employees

# We subjectively determined the scale of these gaps

Subjective measurement of the gaps are provided below based on Vision objective outcomes and current initiatives qualitative outcomes. Customer empowerment and choice is further along the continuum as SSA offers some tailored services and has made an effort to reach customers through different marketing campaigns.

## Scoring Criteria

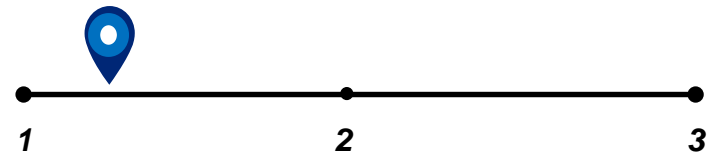
3: Significant progress towards achieving objective; minimal gaps remain

2: Progress towards achieving objective; gaps remain

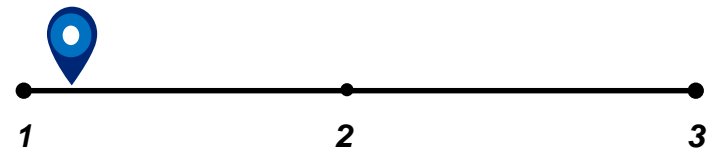
1: Minimal progress towards achieving objective; significant gaps remain



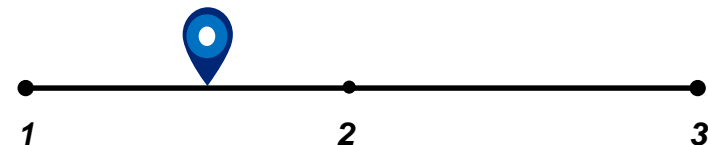
## Consolidated Customer Experience Management



## Omni-Channel Customer Experience

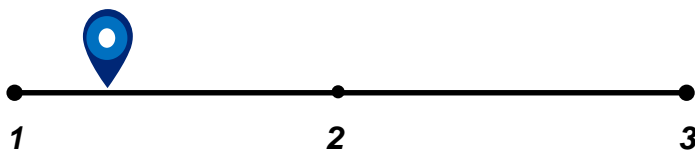


## Customer Empowerment and Choice



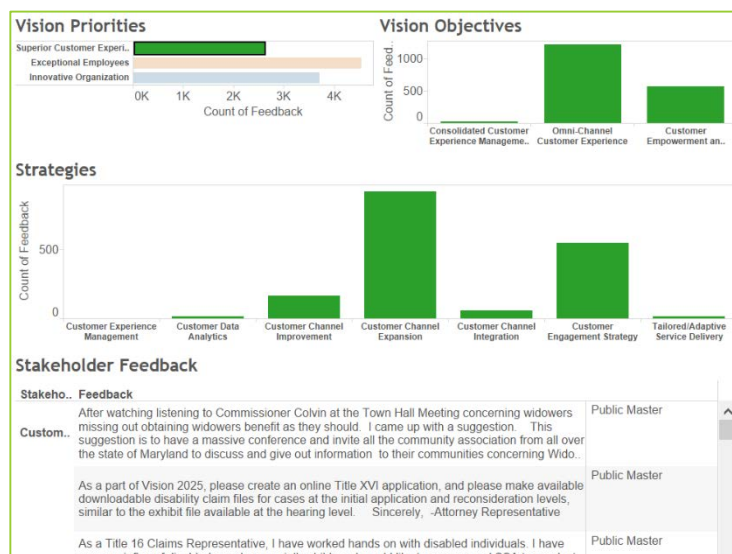
## Superior Customer Experience

Average Score:





# We used input from SSA stakeholders\* to help identify initiatives to fill gaps



We developed an interactive dashboard that allows users to see stakeholder input aligned to the Vision



## Consolidated Customer Experience Management

- **Utilize consistent customer data** both internally and externally to determine customer needs and deliver service that best meets those needs
- **Increase access to customer data** to be able to service customers at the first point of contact; current applications either ask for information that may not be needed or require employees to contact customers to clarify or ask for additional information



## Omni-Channel Customer Experience

- **Increase number of services options** (e.g., video conference assistance, iPhone and Android applications, kiosks, etc.); simple online transactions will benefit customers and also allow front line employees to spend more time addressing the inconsistencies/ complexities that generate office traffic
- **Ensure consistency of customer experience**, information, and satisfaction with self-help services vs. in-person (e.g., no wrong door for customers to go to for services)
- Be able to **provide customers services they need when they need them** (e.g., offer 24/7 customer service)
- **Allow for transactions to be completed at the first point of contact, no matter the channel**



## Customer Empowerment and Choice

- **Provide consistent and easy-to-understand SSA information** and messaging in all customer communication from both the agency (e.g., website, Notices) and external stakeholders (e.g., from advocacy groups, non-profits); misinformation or misinterpretation can have severe impact on customers by causing stress, anxiety, or fear
- **Allow customers to choose their method of engagement with SSA**
- **Educate customers throughout their lifetime**, capitalizing on community outreach opportunities and utilizing SSA marketing to deliver more targeted messages to various customer audiences through a diverse set of communication vehicles

## We also used leading practices from external research



Create a **governing body that has the authority to manage customer experience** across the organization (e.g., USAA's Executive Vice President of Member Experience)



Use **tools to increase the understanding of customers** and to inform adaptation to service delivery (e.g., Barclays' use of segmentation and focus groups to inform tailored services)



**Evaluate channels for expansion and integration** based on customer needs (e.g., Citi's expansion to a mobile application)



**Educate customers** on channel options based on an understanding of customer preferences informed by research and analysis (e.g., HM Revenue and Customs' revenue collection service online campaign)



Expand service delivery **channels to include strategic partners** experiences for customers (e.g., Nevada DMV's kiosks in partner locations)

# Current initiatives, stakeholder\* input, and leading practices create the Vision Roadmap for realizing superior customer experience

Current Initiatives  
Stakeholder input  
Leading practices

	Wave 1a FY16	Wave 1b FY17	Wave 2 FY18-22	Wave 3 FY22-25
<b>Consolidated Customer Experience Management</b>	<ul style="list-style-type: none"> <li>Google Analytics on secured server sites</li> <li>Demographic research</li> <li>Collaborative research</li> <li>Speech analytics from 800 number system upgrades</li> <li>Customer Connect</li> </ul>	<ul style="list-style-type: none"> <li>Evaluate and expand to have a suite of analytical tools across all online services</li> <li>Determine governance and infrastructure for generating and housing customer insights (e.g., Customer Experience Officer)</li> <li>Determine customer experiences most in need of improvements through targeted journey mapping (e.g., applying for retirement benefits in-person)</li> </ul>	<ul style="list-style-type: none"> <li>Develop targeted customer needs/behaviors surveys to advance customer understanding and inform segmentations</li> <li>Expand journey mapping to additional customer experiences (e.g., creating an online account)</li> </ul>	<ul style="list-style-type: none"> <li>Expand predictive analytical tools to external partner data to gain customer insights</li> <li>Develop dynamic surveys to gain real-time customer feedback (e.g., geospatial mobile surveys)</li> </ul>
<b>Omni-Channel Customer Experience</b>	<ul style="list-style-type: none"> <li>Critical Eight: Enhance online services</li> <li>Critical Eight: Reduce the wait for a hearing decision</li> <li>Queuing system improvements</li> <li>Self-Help PC enhancements</li> <li>Online submission to eWork iAppeals</li> <li>mySocialSecurity redesign</li> <li>Online Card Replacement Pilot</li> </ul>	<ul style="list-style-type: none"> <li>Smartclaim</li> <li>Real-time, online customer assistance</li> <li>Conduct evaluation of service delivery channels to determine opportunities for improvements, expansions, and integration</li> </ul>	<p><i>Based on the evaluation:</i></p> <ul style="list-style-type: none"> <li>Address channel improvement opportunities</li> <li>Expand channels and establish partnerships to meet changing customer needs and trends</li> <li>Integrate priority channels and services</li> </ul>	<ul style="list-style-type: none"> <li>Develop process to continuously integrate new channels into omni-channel delivery model</li> <li>Integrate channels with partners to include external services related to SSA (e.g., immigration services that occur before enumeration)</li> </ul>
<b>Customer Empowerment and Choice</b>	<ul style="list-style-type: none"> <li>Critical Eight: Educate the Public about Social Security Programs</li> <li>Secure message center</li> <li>Notice improvements</li> <li>Automated communications to customers with options for action</li> <li>100% permanent and total veterans</li> </ul>	<ul style="list-style-type: none"> <li>Evaluate simplicity and effectiveness of customer communications</li> <li>Develop and pilot community outreach programs</li> <li>Create functionality for enabling opt-in features for customers to receive adapted communications</li> </ul>	<ul style="list-style-type: none"> <li>Customize communications to customer groups based on segmentations</li> <li>Expand and systematically implement community outreach programs</li> <li>Prioritize, pilot, and implement tailored and adapted service for customer groups</li> </ul>	<ul style="list-style-type: none"> <li>Expand communications simplification effort to include external services related to SSA</li> <li>Expand predictive outreach efforts and explore real-time tailored and adaptive services for all customer groups</li> </ul>

# Wave 1a focuses on current initiatives

	Wave 1a FY16	Wave 1b FY17	Wave 2 FY18-22	Wave 3 FY22-25
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# Detailed descriptions of Wave 1a initiatives currently underway

**Key: Strategy**

- Initiative
- Initiative

## Consolidated Customer Experience Management

### Wave 1a: FY16

#### Customer Experience Management

- Customer Connect - Simplifies how customers connect with employees, connects public to SSA, and aims to serve changing needs of customers

#### Customer Data Analytics

- Google Analytics on secured server sites - Collects page view data from Google Analytics to obtain additional management information and user/behavioral statistics
- Demographic research - Analyzes demographic/economic trends to improve old age, survivor and disability insurance (OASDI) and Supplemental Security Income (SSI) effectiveness
- Collaborative research - Researches issues such as improving service to disabled veterans and reducing homelessness with the Veterans Administration
- Speech analytics from 800 number system upgrades - Establishes an infrastructure that enables understanding of voice of the customer

## Omni-Channel Customer Experience

#### Channel Improvement

- Critical Eight: Enhance online services - Broadens the number of services customers can access online and improves existing offerings
- Critical Eight: Reduce the wait for a hearing decision - Identifies methods to reduce hearing wait times to an average of 270 days without sacrificing customer service quality
- Queuing system improvements - Improves queuing in field office through VIP software
- Self-Help PC enhancements - Improves self service options in field offices

#### Channel Expansion

- Online submission to eWork - Allows online work report submissions via the My SSA portal for SSDI beneficiaries
- iAppeals - Makes Internet versions of the SSA-561 (Request for Reconsideration) (i561) and HA-501 (Request for Hearing by Administrative Law Judge) (i501) available and customers can complete steps through multiple visits
- mySocialSecurity redesign - Creates adaptability of eService applications within mySocialSecurity through upgrades to the portal and architecture and creates the ability to support mobile devices
- Online Card Replacement Pilot - Creates ability for customers to replace social security cards online

## Customer Empowerment and Choice

#### Customer Engagement Strategies

- Critical Eight: Educate the Public about Social Security Programs - Uses multiple engagement channels to ensure that the public is aware of, and educated about, the importance of Social Security and its options
- Secure message center - Allows mySocialSecurity account users to receive alerts, messages, and agency announcements through customer engagement tools
- Notice improvements - Improves readability of notice language for disability and Title 16 notices
- Automated communications to customers with options for action - Provides notices and options for customers to control their accounts to prevent fraud, provides alerts for when changes to accounts occur, and lists program details

#### Tailored/Adaptive Service

- 100% permanent and total veterans - Provides expedited disability case processing for veterans

# Recommendations for maximizing impact of some current initiatives

The recommendations below are based on insights gained during interviews with component representatives.

Current Initiative	Recommendations to maximize impact...
Google Analytics on secured server sites	Support decision-making with data analytics
Speech analytics from 800 number system upgrades	Implement software and establish processes to analyze and use voice of the customer data to inform customer experience changes
Customer Connect	Determine reach of insight and role in the future of the organization
Critical Eight: Enhance online services	Collect lessons learned from channel expansion, improvements, and integration projects
Critical Eight: Reduce the wait for a hearing decision	Examine the multiple pilots for lessons learned for continuous improvement and integrate any customer insights learned from the Compassionate and Responsive Service Plan
Queuing system and Self-Help PC enhancements	Evaluate the in-office experience as a whole as compared to customer needs who frequent in-office instead of online service channels
iAppeals	Document lessons learned from making forms available online and reasons for delays in implementation
Online Card Replacement Pilot	Document lessons learned from state agency partnerships and capture and use data analytics for customers using pilot service
Critical Eight: Educate the Public about Social Security Programs	Evaluate education campaigns and communications to determine if they reach the target audiences to adapt methods for future education efforts
Notice improvements	Evaluate notice holistically and coordinate across components in clarification and simplification efforts

# Wave 1b focuses on recommended initiatives that further build the foundation for transformation

	Wave 1a FY16	Wave 1b FY17	Wave 2 FY18-22	Wave 3 FY22-25
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# Wave 1b initiatives come from current initiatives, stakeholder\* input, and leading practices

Initiative	Why we are recommending initiatives
Evaluate and expand to have a suite of analytical tools across all online services	<b>External Research:</b> GSA has teams dedicated to customer experience that collect data and report on customer satisfaction metrics. BBVA processes data in real time across all channels
Determine governance and infrastructure for generating and housing customer insights (e.g., Customer Experience Officer)	<b>External Research:</b> USAA created an Executive Vice President to manage customer experience and consolidated all marketing, sales, channel management, and service functions under that role. United Healthcare appointed a Vice President to manage customer satisfaction and create customer-centric culture across the organization <b>Stakeholder Input:</b> Indicates a desire for more centralized resources
Determine customer experiences most in need of improvements through targeted journey mapping (e.g., applying for retirement benefits in-person)	<b>External Research:</b> United Healthcare developed detailed journey maps to deeply understand customers and shared these journey maps with its employees
Smartclaim	<b>Current initiative</b>
Real-time customer assistance	<b>Current initiative</b>
Conduct evaluation of service delivery channels to determine opportunities for improvements, expansions, and integration	<b>External Research:</b> Las Vegas Department of Motor Vehicles expanded channels to online and self-service options based on customer needs. Citi researched customers to understand what new channels they demanded most and what services they wanted added to existing channels
Evaluate simplicity and effectiveness of customer communications	<b>Stakeholder Input:</b> Indicates frustration from both customers and employees on inconsistent and difficult-to-understand SSA customer communications messaging
Develop and pilot community outreach programs	<b>Stakeholder Input:</b> Employees reported the desire to be empowered to conduct more outreach in their local communities to educate customers
Create functionality for enabling opt-in features for customers to receive adapted communications	<b>External Research:</b> HM Revenue & Customs allowed customers to opt-in to online tax filing instead of paper forms. Companies House went one step further and offered incentives for customers to opt-in to online channels instead of paper forms



# Detailed descriptions of Wave 1b current and recommended initiatives

**Key: Strategy**

- Initiative
- Initiative

## Consolidated Customer Experience Management

### Wave 1b: FY17

#### Customer Experience Management

- Develop a strategy, process, and infrastructure for capturing, analyzing, and managing customer data (from digital and non-digital channels) and for using this data to gain useful insights into the customer experience
- Establish a governance structure that consolidates the customer experience management to a governing body that is empowered to work across components and regions and provide customer insights to employees
- Develop robust customer satisfaction measures and measurement processes that enable in depth analysis across SSA

#### Customer Data Analytics

- Conduct targeted journey mapping to identify customer pain points and improvement opportunities for a select group of services (e.g., applying for retirement benefits in-person, applying for a replacement social security card online)

#### Channel Improvement

- Establish an evaluation structure for determining improvements to existing channels
- Conduct evaluation of channels and document improvements that address the root causes of customer complaints and inefficiencies

#### Channel Expansion

- Establish an evaluation structure for determining expansion of services to existing channels or offering new channels
- Conduct evaluation to determine expansion opportunities (e.g., mobile, additional services offered online, etc.)

#### Channel Integration

- Smartclaim - Allows customers to start an application online and come into an office to complete it for retirement, disability, and Medicare benefits, through a single application
- Real-time customer assistance - Allows anyone navigating the SSA website to communicate with a representative through click-to-communicate technologies and screen-sharing
- Establish a structure for evaluating current channel integration efforts scalability and new areas of integration
- Conduct evaluation to determine integration opportunities and determine technology, processes, and training necessary to integrate the offline and online channels for opportunities

#### Customer Engagement Strategies

- Develop a customer-centric communications program that evaluates the simplicity and effectiveness of communications
- Develop and implement strategies for increasing communications effectiveness (e.g., offering communications in additional languages)
- Determine community outreach organizations that have the most contact with SSA customers and method of contact
- Pilot improvements to customer empowerment through community outreach (e.g., working with a community outreach organization that provides guidance and information on how to apply for benefits)

#### Tailored/Adaptive Service Delivery

- Identify the customer touch points that present the greatest opportunity for tailored content and service delivery for one service (e.g., disability claims)
- Create infrastructure for supporting customer choice and tailored content delivery through enabling the functionality for customers to choose the level and channel of information they receive (e.g., when signing up for an online account they can select the method and amount of communications they receive)

## Omni-Channel Customer Experience

## Customer Empowerment and Choice

# Wave 2 recommended initiatives focus on creating transformation

	Wave 1a FY16	Wave 1b FY17	Wave 2 FY18-22	Wave 3 FY22-25
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<b>Omni-Channel Customer Experience</b>	<ul style="list-style-type: none"> <li>Critical Eight: Enhance online services</li> <li>Critical Eight: Reduce the wait for a hearing decision</li> <li>Queuing system improvements</li> <li>Self-Help PC enhancements</li> <li>Online submission to eWork</li> <li>iAppeals</li> <li>mySocialSecurity redesign</li> </ul>	<ul style="list-style-type: none"> <li>Smartclaim</li> <li>Real-time, online customer assistance</li> <li>Conduct evaluation of service delivery channels to determine opportunities for improvements, expansions, and integration</li> </ul>	<p><i>Based on the evaluation:</i></p> <ul style="list-style-type: none"> <li>Address channel improvement opportunities</li> <li>Expand channels and establish partnerships to meet changing customer needs and trends</li> <li>Integrate priority channels and services</li> </ul>	<ul style="list-style-type: none"> <li>Develop process to continuously integrate new channels into omni-channel delivery model</li> <li>Integrate channels with partners to include external services related to SSA (e.g., immigration services that occur before enumeration)</li> </ul>
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# Wave 2 initiatives come from stakeholder\* input and leading practices

Initiative	Why we are recommending initiatives
Develop targeted customer needs/behaviors surveys to advance customer understanding and inform segmentations	<p><b>External Research:</b> USPS created surveys and focus groups to understand customers' use of postal products and services. Barclays conducted customer segmentation to better understand their customer groups and pinpoint underserved groups</p> <p><b>Stakeholder Input:</b> Employees stated the need for SSA to understand different customer segments and their needs</p>
Expand journey mapping to additional customer experiences (e.g., creating an online account)	<p><b>External Research:</b> United Healthcare developed detailed journey maps to deeply understand customers and shared these journey maps with its employees</p>
Address channel improvement opportunities	<p><b>External Research:</b> Nationwide improved its online services by adding in a live-chat help feature that automatically identifies and helps customers when they are having trouble</p>
Expand channels and establish partnerships to meet changing customer needs and trends	<p><b>External Research:</b> Las Vegas Department of Motor Vehicles expanded channels through partnerships with dealers to improve customer experience and reduce wait times. Citi researched customers to understand what new channels they demand most and what services they want added to existing channels</p>
Integrate priority channels and services	<p><b>External Research:</b> An American loan provider integrated its call center with its digital channel which allows call center employees to directly access and view a customer's web session. BBVA implemented a multi-year overhaul of channel management systems to create integration and real time processing of data across all channels</p> <p><b>Stakeholder Input:</b> Employees emphasized the need to integrate application systems so customers do not need to provide the same information multiple times</p>
Customize communications to customer groups based on segmentations	<p><b>External Research:</b> Barclays used segmentation to send targeted messages to an underserved population. Nationwide individually tailors communications to meet customers online needs through an online live chat feature</p>
Expand and systematically implement community outreach programs	<p><b>Stakeholder Input:</b> Employees reported the desire to be empowered to conduct more outreach in their local communities aimed to educate customers</p>
Prioritize, pilot, and implement tailored and adapted service for customer groups	<p><b>External Research:</b> Barclays used segmentation to adapt services to meet an underserved populations' needs</p>

# Detailed descriptions of Wave 2 initiatives

**Key: Strategy**

- Initiative
- Initiative

## Consolidated Customer Experience Management

### Wave 2: FY18-22

#### Customer Data Analytics

- Incorporate lessons learned from the initial journey mapping to replicate and expand the process for the remaining SSA services, including:
  - SAA field office locations
  - SSA 800 Number and Field Office call center support services
  - All other SSA online services
- Determine objectives of customer segmentations (e.g., improve customer experience through understanding behaviors of customers submitting earning reports)
- Develop targeted customer needs/behaviors surveys to inform segmentations of customers for determined objectives

#### Channel Improvement

- Pilot and scale improvements to channels from the channel improvement evaluation
- Enhance the customer experience across channels through improvements that mitigate customer pain points identified through journey maps

#### Channel Expansion

- Pilot and scale providing services through additional channels (e.g., offering retirement benefit applications online) and creating new channels (e.g., mobile application for services) based on evaluation
- Use information from customer data analytics to provide insights on changing customer needs during expansion efforts
- Establish strategic infrastructure partnerships with government agencies and large corporations in related industries to offer SSA services via these partner locations (e.g., apply for a replacement card at a Post Office)

#### Channel Integration

- Implement the necessary technology, training, and processes to integrate priority SSA services across relevant channels, which requires an understanding of the backend IT requirements of customer-facing technologies

## Omni-Channel Customer Experience

## Customer Empowerment and Choice

#### Customer Engagement Strategies

- Use information gained through customer data analytics to customize communications and outreach efforts to different customer groups
- Scale current successful pilots and determine additional outreach groups that connect with SSA customers and expand community outreach programs based on lessons learned from initial pilots

#### Tailored/Adaptive Service Delivery

- Expand identification of impactful points for tailored content delivery to all services and channels
- Pilot and scale tailored customer experiences for service delivery across channels
- Explore additional ways to tailor service delivery and content to customer based on improved understanding of customers from data analytics (e.g., tailored service delivery and content based on customer survey responses to a preset list of questions that answer why customers are using the service)

# Wave 3 initiatives focus on further advancing “one government” strategies

	Wave 1a FY16	Wave 1b FY17	Wave 2 FY18-22	Wave 3 FY22-25
<b>Consolidated Customer Experience Management</b>	<ul style="list-style-type: none"> <li>Google Analytics on secured server sites</li> <li>Demographic research</li> <li>Collaborative research</li> <li>Speech analytics from 800 number system upgrades</li> <li>Customer Connect</li> </ul>	<ul style="list-style-type: none"> <li>Evaluate and expand to have a suite of analytical tools across all online services</li> <li>Determine governance and infrastructure for generating and housing customer insights (e.g., Customer Experience Officer)</li> <li>Determine customer experiences most in need of improvements through targeted journey mapping (e.g., applying for retirement benefits in-person)</li> </ul>	<ul style="list-style-type: none"> <li>Develop targeted customer needs/behaviors surveys to advance customer understanding and inform segmentations</li> <li>Expand journey mapping to additional customer experiences (e.g., creating an online account)</li> </ul>	<ul style="list-style-type: none"> <li>Expand predictive analytical tools to external partner data to gain customer insights</li> <li>Develop dynamic surveys to gain real-time customer feedback (e.g., geospatial mobile surveys)</li> </ul>
<b>Omni-Channel Customer Experience</b>	<ul style="list-style-type: none"> <li>Critical Eight: Enhance online services</li> <li>Critical Eight: Reduce the wait for a hearing decision</li> <li>Queuing system improvements</li> <li>Self-Help PC enhancements</li> <li>Online submission to eWork</li> <li>iAppeals</li> <li>mySocialSecurity redesign</li> </ul>	<ul style="list-style-type: none"> <li>Smartclaim</li> <li>Real-time, online customer assistance</li> <li>Conduct evaluation of service delivery channels to determine opportunities for improvements, expansions, and integration</li> </ul>	<p><i>Based on the evaluation:</i></p> <ul style="list-style-type: none"> <li>Address channel improvement opportunities</li> <li>Expand channels and establish partnerships to meet changing customer needs and trends</li> <li>Integrate priority channels and services</li> </ul>	<ul style="list-style-type: none"> <li>Develop process to continuously integrate new channels into omni-channel delivery model</li> <li>Integrate channels with partners to include external services related to SSA (e.g., immigration services that occur before enumeration)</li> </ul>
<b>Customer Empowerment and Choice</b>	<ul style="list-style-type: none"> <li>Critical Eight: Educate the Public about Social Security Programs</li> <li>Secure message center</li> <li>Notice improvements</li> <li>Automated communications to customers with options for action</li> <li>100% permanent and total veterans</li> </ul>	<ul style="list-style-type: none"> <li>Evaluate simplicity and effectiveness of customer communications</li> <li>Develop and pilot community outreach programs</li> <li>Create functionality for enabling opt-in features for customers to receive adapted communications</li> </ul>	<ul style="list-style-type: none"> <li>Customize communications to customer groups based on segmentations</li> <li>Expand and systematically implement community outreach programs</li> <li>Prioritize, pilot, and implement tailored and adapted service for customer groups</li> </ul>	<ul style="list-style-type: none"> <li>Expand communications simplification effort to include external services related to SSA</li> <li>Expand predictive outreach efforts and explore real-time tailored and adaptive services for all customer groups</li> </ul>

# Wave 3 initiatives come from stakeholder\* input, leading practices, and additional Deloitte recommendations

Initiative	Why we are recommending initiatives
Expand predictive analytical tools to external partner data to gain customer insights	<b>Deloitte Recommendation:</b> As new methods for capturing, analyzing, and visualizing data continue to develop over the next 10 years, these methods can be evaluated and then expanded to use with partner organizations to gain a deeper understanding of SSA customers
Develop dynamic surveys to gain real-time customer feedback (e.g., geospatial mobile surveys)	<b>External Research:</b> BBVA uses channel integration to capture real-time data across all service channels <b>Deloitte Recommendation:</b> As new methods for collecting customer experience data continue to develop, these methods can be evaluated and integrated to advance SSA's knowledge of customer needs, preferences, and behaviors
Develop process to continuously integrate new channels into omni-channel delivery model	<b>Deloitte Recommendation:</b> As channels become integrated, it will be important to set up a process to evaluate and add additional channels into the integrated structure
Integrate channels with partners to include external services related to SSA (e.g., immigration services that occur before enumeration)	<b>Deloitte Recommendation:</b> As SSA expands channel service offerings and establishes external partnerships, there may be an opportunity for SSA to integrate back-end customer service transactions across partnership organizations to seamlessly reduce customer touchpoints and meet customer needs
Expand communications simplification effort to include external services related to SSA	<b>Deloitte Recommendation:</b> There is an opportunity for SSA to work with partners to streamline communications across multiple touchpoints from SSA and partners
Expand predictive outreach efforts and explore real-time tailored and adaptive services for all customer groups	<b>External Research:</b> Nationwide uses customer data to automatically identify customers having trouble with their online channels and proactively live chats customers to assist them with any issues <b>Deloitte Recommendation:</b> As SSA's understanding of customers advances, SSA can create the ability to expand predictive efforts to anticipate customer needs and better control the overall customer experience

# Detailed descriptions of Wave 3 initiatives

**Key: Strategy**

- Initiative
- Initiative

## Consolidated Customer Experience Management

### Wave 3: F22-25

#### Customer Data Analytics

- Expand predictive analytical tools to capture a deeper understanding of all customers and their actions across external partners
- Account for changes in customer trends in real-time to act on opportunities to immediately enhance the customer experience (e.g., geospatial mobile surveys that are triggered by customer proximity to SSA offices)

## Omni-Channel Customer Experience

#### Channel Expansion

- Develop and implement agile approach for expanding service delivery features in response to changing technology threats and opportunities
- Expand channels with partners to include partner administration of defined services (e.g., immigration services that occur before enumeration directly link to the enumeration process and partners have the ability to provide full service)

#### Channel Integration

- Develop systems to support inter-agency data-sharing initiatives that give customers the ability to share data across agencies so they do not need to repeatedly provide the same information to several agencies
- Integrate new channels into SSA's existing omni-channel delivery model and continually assess and improve integration capabilities

## Customer Empowerment and Choice

#### Customer Engagement Strategies

- Use strategic partnerships with agencies to create combined simplified communications that anticipate the needs of customer who are receiving services from multiple government agencies

#### Tailored/Adaptive Service Delivery

- Tailor every customer transaction from beginning to end based on insights gained from real-time behavior analysis
- Provide targeted outreach to customers who may soon become eligible for SSA programs by performing predictive analytics on public and private data



# These waves combined create the Vision Roadmap for superior customer experience



## Consolidated Customer Experience Management

- Google Analytics on secured server sites
- Demographic research
- Collaborative research
- Speech analytics from 800 number system upgrades
- Customer Connect

- Evaluate and expand to have a suite of analytical tools across all online services
- Determine governance and infrastructure for generating and housing customer insights (e.g., Customer Experience Officer)
- Determine customer experiences most in need of improvements through targeted journey mapping (e.g., applying for retirement benefits in-person)

- Develop targeted customer needs/behaviors surveys to advance customer understanding and inform segmentations
- Expand journey mapping to additional customer experiences (e.g., creating an online account)

- Expand predictive analytical tools to external partner data to gain customer insights
- Develop dynamic surveys to gain real-time customer feedback (e.g., geospatial mobile surveys)

## Omni-Channel Customer Experience

- Critical Eight: Enhance online services
- Critical Eight: Reduce the wait for a hearing decision
- Queuing system improvements
- Self-Help PC enhancements
- Online submission to eWork
- iAppeals
- mySocialSecurity redesign
- Online Card Replacement Pilot

- Smartclaim
- Real-time, online customer assistance
- Conduct evaluation of service delivery channels to determine opportunities for improvements, expansions, and integration

- Based on the evaluation:*
- Address channel improvement opportunities
  - Expand channels and establish partnerships to meet changing customer needs and trends
  - Integrate priority channels and services

- Develop process to continuously integrate new channels into omni-channel delivery model
- Integrate channels with partners to include external services related to SSA (e.g., immigration services that occur before enumeration)

## Customer Empowerment and Choice

- Critical Eight: Educate the Public about Social Security Programs
- Secure message center
- Notice improvements
- Automated communications to customers with options for action
- 100% permanent and total veterans

- Evaluate simplicity and effectiveness of customer communications
- Develop and pilot community outreach programs
- Create functionality for enabling opt-in features for customers to receive adapted communications

- Customize communications to customer groups based on segmentations
- Expand and systematically implement community outreach programs
- Prioritize, pilot, and implement tailored and adapted service for customer groups

- Expand communications simplification effort to include external services related to SSA
- Expand predictive outreach efforts and explore real-time tailored and adaptive services for all customer groups





## Exceptional Employees



In 2025, we attract top talent and support our employees through developmental opportunities, active engagement, and empowerment to make decisions. Our employees reflect the "heart of the agency," providing a high-quality, personalized customer experience through compassion and dedication to our mission.

# SSA set bold objectives for creating exceptional employees



## Exceptional Employee:

*Every SSA employee operates in a flexible and highly-engaging working environment that supports and develops them in providing quality customer service*

### Vision Objectives



#### Employee Engagement

SSA has a deep understanding of what motivates employees and rolls out cultural change initiatives to increase employees' involvement.

**By 2025...** SSA employee feedback and engagement measurement is captured across multiple channels and real time analysis creates recommendation for changes to improve how employees are engaged across SSA.



#### Employee Development

SSA prioritizes employee development through development plans, access to compelling learning and development opportunities, and a culture of knowledge-sharing.

**By 2025...** SSA employees have personalized development plans that assess their core competencies for their role, provide potential career paths to work towards, and list development programs the employees can apply for or participate in.



#### Employee Empowerment

SSA has a work environment that provides employees with the flexibility and authority to make a tangible impact on their work environment and SSA's mission.

**By 2025...** An SSA field office employee has a new idea for improving their local office, he/she submits the idea through a platform, present it to leadership, and receive authorization and funding to pilot and scale his/her idea from senior leaders.

# We developed strategies and quantifiable outcomes based on objectives



## Exceptional Employee:

*Every SSA employee operates in a flexible and highly-engaging working environment that supports and develops them in providing quality customer service*

**Overall Measure: OPM Employee Engagement Index**

## Vision Strategies



### Employee Engagement

- **Employee Engagement Strategies:** Develops a unified strategy to increase employee connection to the organization across components and participation in decision-making
- **Employee Feedback Mechanisms:** Captures, monitors, and acts on employee ideas, issues, and organization insights
- **Integrated Employee/Customer Management:** Aligns employee engagement efforts to fulfilling customer needs

**Outcome:** SSA maintains outstanding employee engagement as measured by SSA specific metrics



### Employee Development

- **Employee Development Plans/Programs:** Defines competency models and offers programs that focus on developing employee skills
- **Training:** Develops and delivers comprehensive trainings in a way that builds employee skillsets
- **knowledge-sharing:** Encourages and supports employees in sharing information, expertise, and insights across the agency

**Outcome:** SSA has personalized, comprehensive development plans for every employee

**Outcome:** All SSA employees have access to the knowledge and expertise of their colleagues on demand

**Outcome:** All employee training programs are based on employee and agency-desired skill sets



### Employee Empowerment

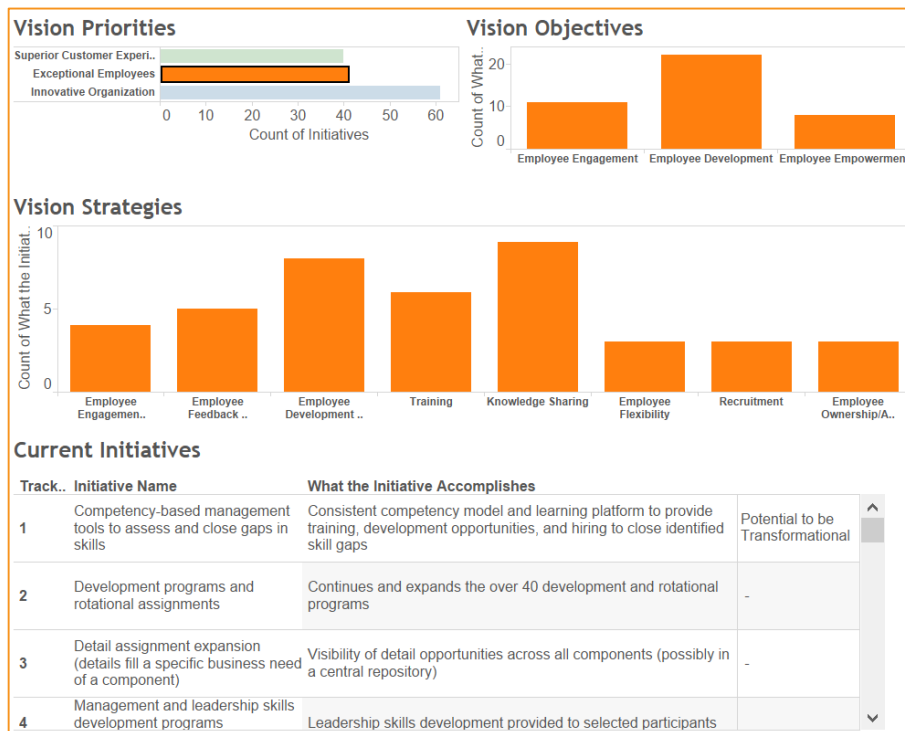
- **Employee Flexibility:** Creates channels for employees to work from a variety of locations and makes intentional shifts in workload
- **Recruitment:** Develops a strong recruiting pipeline of top talent and removes barriers to filling roles
- **Employee Ownership/Accountability:** Provides employees with tools to make decisions and creates accountability structures for their work

**Outcome:** All SSA employees have the flexibility to do their jobs in the manner that best serves SSA's mission

**Outcome:** All SSA managers have the authority to hire new talent and are held accountable for their performance

# Many current initiatives support these outcomes

## Exceptional Employee Current Initiative Analysis



*We developed an interactive dashboard that allows users to see the alignment of current initiatives to the Vision.*



### Employee Engagement current initiatives will...

- Provide **engagement tools** to employees and **support engagement strategies within components** (e.g., employee engagement community of practice)
- Capture **employee feedback across online and in-person channels** (e.g., IdeaScale)



### Employee Development current initiatives will...

- Provide **developmental programs at the agency and component level** and begin to use competency tools (e.g., agency mentorship program)
- Offer **trainings across positions and topic areas** (e.g., management and supervisor training)
- **Provide platforms for knowledge-sharing** across the agency (e.g., Skills Connect and web-based knowledge-sharing platforms)



### Employee Empowerment current initiatives will...

- Expand employee flexibility through **telework and workload adjustments** (e.g., single device setup that enables telework capabilities)
- Provide **hiring resources** to managers and advertise development opportunities to potential recruits (e.g., Pathways Program)
- Provide **real-time performance feedback** to employees (e.g., how am I doing tool)

# Gaps remain in realizing these outcomes

## Overarching Exceptional Employee Gap: Linking employee and customer management



### Employee Engagement

**Outcome:** SSA maintains outstanding employee engagement as measured by SSA specific metrics

#### Gaps:

- SSA lacks a comprehensive set of measures for understanding **employee engagement** and analysis to inform engagement strategies
- SSA **lacks a process to consolidate, regularly analyze, and use employee feedback** across engagement channels
- SSA does not have a comprehensive understanding of **correlation of employee engagement with other key performance areas, most importantly customer satisfaction** (e.g., correlation between employee engagement with other key performance measures including customer experience)



### Employee Development

**Outcome:** SSA has personalized, comprehensive development plans for every employee

**Outcome:** All SSA employees have access to the knowledge and expertise of their colleagues on demand

**Outcome:** All employee training programs are based on employee and agency-desired skill sets

#### Gaps:

- SSA **does not have agency-wide competency models, development plans, or defined career paths** to provide guidance to employees and allow employees to work in different components
- SSA has knowledge-sharing platforms but there is **limited awareness, promotion, and use** by employees
- SSA's training delivery methods **may not effectively develop specialized skills**



### Employee Empowerment

**Outcome:** All SSA employees have the flexibility to do their jobs in the manner that best serves SSA's mission

**Outcome:** All SSA managers have the authority to hire new talent and are held accountable for their performance

#### Gaps:

- SSA has few efforts underway to **improve workplace flexibility beyond telework**
- SSA **emphasizes production outputs over customer experience and employee development**
- SSA **employees lack decision-making ownership and authority** to test and implement new ideas
- SSA **does not have flexibility for management to hire rapidly** to fill immediate needs

# We subjectively determined the scale of these gaps

Subjective measurement of the gaps are provided below based on Vision objective outcomes and current initiatives qualitative outcomes. Employee engagement is further along the continuum as SSA does have some mechanisms to understand what motivates employees and connects them to the organization (e.g. engagement community of practice).

## Scoring Criteria

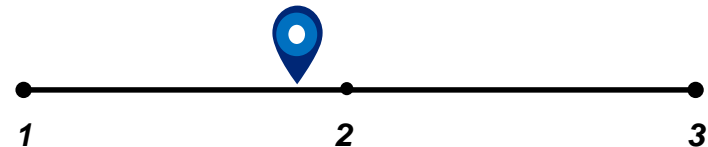
3: Significant progress towards achieving objective; minimal gaps remain

2: Progress towards achieving objective; gaps remain

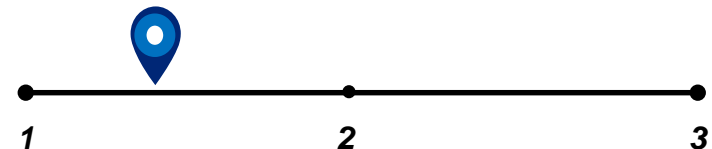
1: Minimal progress towards achieving objective; significant gaps remain



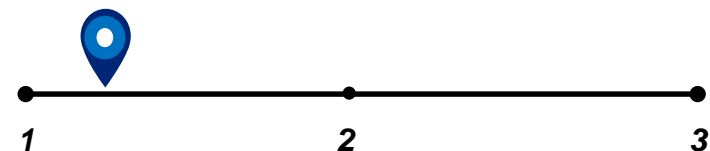
## Employee Engagement



## Employee Development

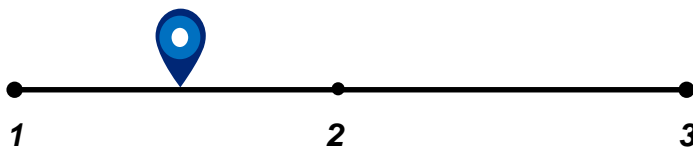


## Employee Empowerment



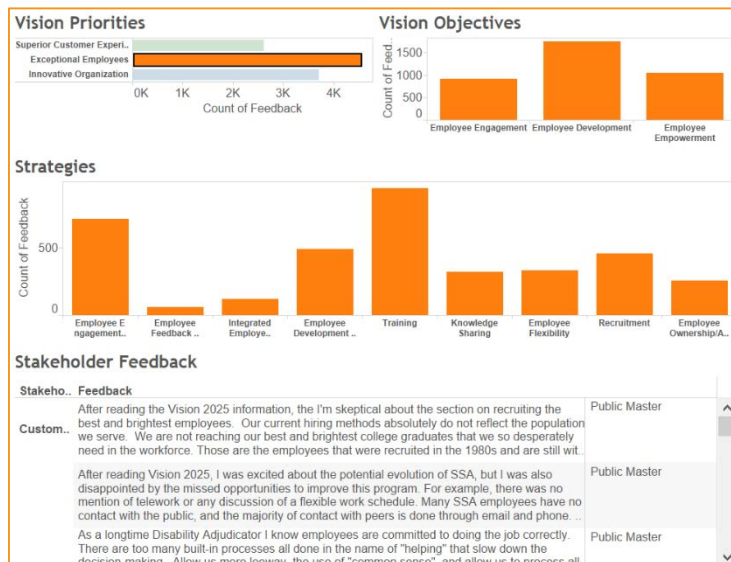
## Exceptional Employees

Average Score:





# We used input from SSA stakeholders\* to help identify initiatives to fill gaps



We developed an interactive dashboard that allows users to see stakeholder input aligned to the Vision



## Employee Engagement

- **Demonstrate that SSA values employee feedback** and acts on voiced concerns, ideas, recommendations
- **Provide formal and informal incentives** to motivate employees and encourage desired behaviors (e.g., performance rewards and recognition)
- **Improve communication** between management and employees (e.g., encourage managers to be more transparent with their teams)
- **Communicate early and often** as process or technology changes or updates occur (e.g., clearly articulate how employee input led to the change)
- **Shift focus across components to “One SSA”** (e.g., enhance engagement in activities to agency-wide instead of component focused)



## Employee Development

- Build and implement more **cross-component training** and rotations for all employees (e.g., expand JELP)
- **Reward and increase management accountability in developing employees** (e.g., provide a tool for managers to reference when discussing performance expectations and role opportunities across the agency)
- **Increase mentoring opportunities** at all levels
- Enhance **training delivery methods** to best meet employee needs (e.g., VOD/ online training is not always the most effective for learning new information or processes)
- **Build and promote clear career paths** for employees and make employees aware of the various development options



## Employee Empowerment

- Hire top talent to fill the needs of the agency and institute **faster hiring processes** and effective retention strategies
- **Allow employees to work directly with employees in other components** (e.g., empower employees to collaborate to solve problems and serve customers)
- **Encourage employees to use creativity** and available resources to service customers without focusing solely on output
- Provide **workplace flexibility** options (e.g., telework)
- **Increase visibility into agency processes** and promote **accountability** at lower levels of the organization (e.g., provide a tool that allows employees to view the information they need to make informed decisions on policy/ processes/ procedures)

## We also used leading practices from external research



Provide **formal education, training**, on-the-job development experiences, and leadership development (e.g., NASA's dedicated training and development strategy)



**Create location flexibility for employees to do their jobs where it best meets the needs of customers** and serves the organization's mission (e.g., Miami-Dade's case workers used mobile technology to do work in the field instead of home or in the office)

United Kingdom's



Department  
for Work &  
Pensions

**Engages employees to submit improvement and innovation ideas** through an ideation platform and funds pilots for promising ideas (e.g., U.K. Department for Work and Pensions' Bright Ideas portal)



**Use competency models** to create clarity in employee development and performance outcomes (e.g., BlueCross BlueShield's leadership competency framework)



**Create recruiting strategies** that are informed by data and accomplish organizational goals (e.g., Federal Bureau of Investigation's recruiting strategy with universities)



# Current initiatives, stakeholder\* input, and leading practices create the Vision Roadmap for realizing exceptional employees

Current Initiatives  
Stakeholder input  
Leading practices

	Wave 1a FY16	Wave 1b FY17	Wave 2 FY18-22	Wave 3 FY22-25
Engagement	<ul style="list-style-type: none"> <li>Engagement Toolkit</li> <li>Engagement Community of Practice</li> <li>IdeaScale software for employee feedback</li> </ul>	<ul style="list-style-type: none"> <li>Define internal employee engagement measurement and capture method</li> <li>Evaluate and consolidate employee feedback channels</li> <li>Evaluate potential connections between employee engagement and customer satisfaction</li> </ul>	<ul style="list-style-type: none"> <li>Use internal engagement measures to develop engagement strategies</li> <li>Develop process for analyzing and responding to employee feedback</li> <li>Create incentive structures that align employee performance with output and customer satisfaction</li> </ul>	<ul style="list-style-type: none"> <li>Establish real-time analysis and reporting of internal employee engagement measure</li> <li>Link SSA employee management with how they work with partner organizations to meet the needs of customers</li> </ul>
Development	<ul style="list-style-type: none"> <li>Critical Eight: Promote Employee Development and Engagement</li> <li>Critical Eight: Improve Succession Planning</li> <li>Agency-wide knowledge management plan</li> <li>Evaluate pilot of talent and skills sharing platforms</li> <li>Competency-based management tools</li> </ul>	<ul style="list-style-type: none"> <li>Develop competency models for employees based on role</li> <li>Assess training delivery models compared to employees skill development needs</li> <li>Define and communicate potential career paths to all employees</li> </ul>	<ul style="list-style-type: none"> <li>Create personalized development plans to include development programs and guidance on career path options</li> <li>Develop content for and pilot dynamic training delivery models</li> <li>Expand successful components of the talent and skills sharing platform</li> </ul>	<ul style="list-style-type: none"> <li>Explore expansions and improvements to external developmental programs and rotations</li> <li>Dynamically adjust training delivery models and methods to develop priority skillsets</li> <li>Expand knowledge-sharing infrastructure to external partners</li> </ul>
Empowerment	<ul style="list-style-type: none"> <li>Telework analysis and expansion through single device set up</li> <li>Pathways program expansion</li> <li>Interview and hiring resources</li> <li>How am I doing tool</li> </ul>	<ul style="list-style-type: none"> <li>Pilot initiatives that expand flexibility beyond telework</li> <li>Examine current recruitment process, expand and establish additional recruiting partnerships</li> <li>Take an inventory of and evaluate current Customer Response Toolkits that support employee decision-making</li> <li>Evaluate IdeaScale and define strategy for and governance of enhanced ideation platform</li> </ul>	<ul style="list-style-type: none"> <li>Expand successful elements of flexibility programs</li> <li>Evaluate talent pipeline and prioritize relationships with providers of highest performing talent</li> <li>Communicate location of and add tools to Customer Response Toolkits</li> <li>Expand ideation platform to include full-funding model for ideas to improve SSA</li> </ul>	<ul style="list-style-type: none"> <li>Enhance flexible working options that align to changing employee needs</li> <li>Explore alternative recruitment and talent employment models (e.g., short-term skills based)</li> <li>Expand ideation platforms to additional mediums (e.g., mobile) and external partners for input</li> </ul>

# Wave 1a focuses on current initiatives

	Wave 1a FY16	Wave 1b FY17	Wave 2 FY18-22	Wave 3 FY22-25
Engagement	<ul style="list-style-type: none"> <li>Engagement Toolkit</li> <li>Engagement Community of Practice</li> <li>IdeaScale software for employee feedback</li> </ul>	<ul style="list-style-type: none"> <li>Define internal employee engagement measurement and capture method</li> <li>Evaluate and consolidate employee feedback channels</li> <li>Evaluate potential connections between employee engagement and customer satisfaction</li> </ul>	<ul style="list-style-type: none"> <li>Use internal engagement measures to develop engagement strategies</li> <li>Develop process for analyzing and responding to employee feedback</li> <li>Create incentive structures that align employee performance with output and customer satisfaction</li> </ul>	<ul style="list-style-type: none"> <li>Establish real-time analysis and reporting of internal employee engagement measure</li> <li>Link SSA employee management with how they work with partner organizations to meet the needs of customers</li> </ul>
Development	<ul style="list-style-type: none"> <li>Critical Eight: Promote Employee Development and Engagement</li> <li>Critical Eight: Improve Succession Planning</li> <li>Agency-wide knowledge management plan</li> <li>Evaluate pilot of talent and skills sharing platforms</li> <li>Competency-based management tools</li> </ul>	<ul style="list-style-type: none"> <li>Develop competency models for employees based on role</li> <li>Assess training delivery models compared to employees skill development needs</li> <li>Define and communicate potential career paths to all employees</li> </ul>	<ul style="list-style-type: none"> <li>Create personalized development plans to include development programs and guidance on career path options</li> <li>Develop content for and pilot dynamic training delivery models</li> <li>Expand successful components of the talent and skills sharing platform</li> </ul>	<ul style="list-style-type: none"> <li>Explore expansions and improvements to external developmental programs and rotations</li> <li>Dynamically adjust training delivery models and methods to develop priority skillsets</li> <li>Expand knowledge-sharing infrastructure to external partners</li> </ul>
Empowerment	<ul style="list-style-type: none"> <li>Telework analysis and expansion through single device set up</li> <li>Pathways program expansion</li> <li>Interview and hiring resources</li> <li>How am I doing tool</li> </ul>	<ul style="list-style-type: none"> <li>Pilot initiatives that expand flexibility beyond telework</li> <li>Examine current recruitment process, expand and establish additional recruiting partnerships</li> <li>Take an inventory of and evaluate current Customer Response Toolkits that support employee decision-making</li> <li>Evaluate IdeaScale and define strategy for and governance of enhanced ideation platform</li> </ul>	<ul style="list-style-type: none"> <li>Expand successful elements of flexibility programs</li> <li>Evaluate talent pipeline and prioritize relationships with providers of highest performing talent</li> <li>Communicate location of and add tools to Customer Response Toolkits</li> <li>Expand ideation platform to include full-funding model for ideas to improve SSA</li> </ul>	<ul style="list-style-type: none"> <li>Enhance flexible working options that align to changing employee needs</li> <li>Explore alternative recruitment and talent employment models (e.g., short-term skills based)</li> <li>Expand ideation platforms to additional mediums (e.g., mobile) and external partners for input</li> </ul>

# Detailed descriptions of Wave 1a initiatives currently underway

**Key: Strategy**

- Initiative
- Initiative

## Wave 1a: FY16

### Engagement

#### Employee Engagement Strategies

- Engagement Toolkit - Equips employees with online tools for improving engagement and satisfaction
- Engagement Community of Practice – Reviews FEVS data and develops engagement action plans and works with components on improving engagement

#### Employee Feedback Mechanisms

- IdeaScale software for employee feedback - Uses IdeaScale across the organization to capture feedback on targeted topics

### Development

#### Employee Development Plans/Programs

- Critical Eight: Promote Employee Development and Engagement - Develops programs and opportunities for employees to grow and advance
- Competency-based management tools to assess and close gaps in skills - Creates a competency model and learning platform to provide training, development opportunities, and hiring to close identified skill gaps

#### knowledge-sharing

- Critical Eight: Improve Succession Planning - Identifies and creates developmental opportunities necessary to ensure continuity in leadership and other critical agency positions
- Agency-wide knowledge management plan - Plans for structure around information and knowledge-sharing to fight the knowledge gap when employees retire
- Talent and skills sharing platform pilot - Creates a platform to develop and share skills and talent to create an agile and engaged workforce

### Empowerment

#### Employee Flexibility

- Telework analysis and expansion through single device setup (SDS) - Improves employee flexibility by enabling employees to work from different locations; includes technology to enable telework

#### Recruitment

- Interview and hiring resources - Develops materials that guide management during the hiring process
- Pathways program expansion - Attracts talented workforce with meaningful training and development opportunities

#### Employee Ownership/ Accountability

- How am I doing tool - Provides real-time performance related feedback to employees

# Recommendations for maximizing impact of some current initiatives

The recommendations below are based on insights gained during interviews with component representatives.

Current Initiative	Recommendations to maximize impact...
Engagement Toolkit	Communicate location and value of tools to employees and evaluate use of tools across agency
Critical Eight: Promote Employee Development and Engagement	Capture lessons learned and evaluate potential for cross-component expansion of established programs
Agency-wide knowledge management plan	Monitor and support this initiative as it has the potential to create agency-wide insights and management of knowledge-sharing
Evaluate pilot of talent and skills sharing platforms	Determine outcomes of the pilot and document lessons learned since it is a part of an overarching GovConnect from OPM and could have cross-agency connections
Competency-based management tools	Evaluate further to see if it creates incentives and connections to customer experience and adaptive culture
Pathways program expansion	Determine effectiveness of these programs for recruiting the right talent and developing a pipeline
How am I doing tool	Evaluate further to see if the measurements in the how am I doing tool goes beyond output measures and include customer satisfaction or other measures important to Vision 2025

# Wave 1b focuses on recommended initiatives that further build the foundation for transformation

	Wave 1a FY16	Wave 1b FY17	Wave 2 FY18-22	Wave 3 FY22-25
Engagement	<ul style="list-style-type: none"> <li>Engagement Toolkit</li> <li>Engagement Community of Practice</li> <li>IdeaScale software for employee feedback</li> </ul>	<ul style="list-style-type: none"> <li>Define internal employee engagement measurement and capture method</li> <li>Evaluate and consolidate employee feedback channels</li> <li>Evaluate potential connections between employee engagement and customer satisfaction</li> </ul>	<ul style="list-style-type: none"> <li>Use internal engagement measures to develop engagement strategies</li> <li>Develop process for analyzing and responding to employee feedback</li> <li>Create incentive structures that align employee performance with output and customer satisfaction</li> </ul>	<ul style="list-style-type: none"> <li>Establish real-time analysis and reporting of internal employee engagement measure</li> <li>Link SSA employee management with how they work with partner organizations to meet the needs of customers</li> </ul>
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# Wave 1b initiatives come from stakeholder\* input and leading practices

Initiative	Why we are recommending initiatives
Define internal employee engagement measurement and capture method	<b>Stakeholder Input:</b> Employees indicated there is a need to focus on employee engagement particularly during times of change. They also indicated that the Federal Employee Engagement Survey does not accurately reflect engagement
Evaluate and consolidate employee feedback channels	<b>Stakeholder Input:</b> Employees indicated a desire to understand where their feedback is going and how it is being used
Evaluate potential connections between employee engagement and customer satisfaction	<b>External Research:</b> Edward Jones recognized the connection between work responsibilities and meaningful outcomes, so the organization invests heavily in rewards, flexibility, and development <b>Stakeholder Input:</b> Customers report inconsistent service quality depending on employee interactions
Develop competency models for employees based on role	<b>External Research:</b> BlueCross BlueShield aligned strategic goals, performance reviews, and leadership development with defined competencies <b>Stakeholder Input:</b> Employees want to see a competency model developed and trainings mapped to the model
Assess training delivery models compared to employees skill development needs	<b>Stakeholder Input:</b> Employees frequently reported their desire for more cross-component training as well as clear training plans aligned with career paths
Define and communicate potential career paths to all employees	<b>Stakeholder Input:</b> Employees reported that development options and opportunities across the agency are not clear and are not promoted to all employees; frequently opportunities are known by word-of-mouth rather than formal publication
Pilot initiatives that expand flexibility beyond telework	<b>External Research:</b> GSA invested in flexibility, including desk sharing, hot desking, open environment, and alternative work schedules. Miami-Dade County equipped case workers with camera-enabled smartphones and laptops to support paperwork completion in the field
Examine current recruitment process, expand and establish additional recruiting partnerships	<b>External Research:</b> The Federal Bureau of Investigations improved recruiting effectiveness by partnering directly with marketing students and professors at universities to deploy targeted messaging at identified top feeder schools <b>Stakeholder Input:</b> Managers want faster hiring processes
Take an inventory of and evaluate current Customer Response Toolkits that support employee decision-making	<b>Stakeholder Input:</b> Employees reported a desire to be empowered by being able to access the customer information they need, as well as work directly with other components <b>External Research:</b> The Consumer Financial Protection Bureau provides information to employees in order for them to provide accurate counseling services to workforce with disabilities
Evaluate IdeaScale and define strategy for and governance of enhanced ideation platform	<b>External Research:</b> The United Kingdom's Department for Work and Pensions developed an ideas platform for innovation and improvements, and the United States Citizen Immigration Services developed innovation challenges for employees to solve problems that interest them

# Detailed descriptions of Wave 1b recommended initiatives

**Key: Strategy**

- Initiative
- Initiative

## Wave 1b: FY17

### Engagement

#### Employee Engagement Strategies

- Host working group sessions with employee segments on the topic of engagement to identify the key drivers of employee engagement within SSA, including: effectiveness of leadership, supervisor/staff relationships, and alignment of daily work to agency mission objectives
- Analyze and incorporate feedback into an initial employee engagement measure

#### Employee Feedback Mechanisms

- Develop structure and frequency for polling, collecting, managing, and analyzing SSA employee engagement measurement
- Identify and evaluate feedback mechanisms for consolidation across components based on criteria (e.g., reach and purpose of feedback mechanism)

#### Integrated Employee/Customer Management

- Evaluate points of connection between SSA employees and customers for customer satisfaction and employee incentives and actions (e.g., timing constraints that may force an employee to prioritize immediate task over customer)

### Development

#### Employee Development Plans/Programs

- Conduct an analysis of best practices in both public and private sector organizations to identify examples of competency models used to set skills and role expectations
- Evaluate competency models for the ability to adapt existing competency-based tools initiative into a competency model for SSA roles and align competency model to performance management
- Develop potential career path options for employees across all components

#### Training

- Evaluate enterprise-wide training needs including ability of training to fill knowledge and skill gaps
- Assess current training delivery models for ability to develop core skills (e.g., ability of in-person lecture-style training to develop employee data analysis and modeling skills)

### Empowerment

#### Employee Flexibility

- Use and promote all OPM flexible workplace options
- Determine how flexibility tools can support employees by performing research and interviews (e.g., mobile devices' ability to support field personnel mobility outside of field offices)
- Pilot selected flexibility initiatives based on research, evaluate effectiveness on service delivery quality and employee empowerment, and scale initiatives

#### Recruitment

- Evaluate current recruiting methods, determine barriers to getting the proper talent, and create strategies to resolve
- Identify and establish relationships with potential top recruiting pipeline organizations to expand recruiting efforts

#### Employee Ownership/ Accountability

- Determine successful attributes of IdeaScale and launch an enhanced ideation platform and governance structure for collecting and acting on employee ideas for improvements to the organization
- Identify components and channels where tools exist to support employee decision-making in response to customers and evaluate the usefulness, reach, and ability to expand these tools



# Wave 2 recommended initiatives focus on creating transformation

	Wave 1a FY16	Wave 1b FY17	Wave 2 FY18-22	Wave 3 FY22-25
Engagement	<ul style="list-style-type: none"> <li>Engagement Toolkit</li> <li>Engagement Community of Practice</li> <li>IdeaScale software for employee feedback</li> </ul>	<ul style="list-style-type: none"> <li>Define internal employee engagement measurement and capture method</li> <li>Evaluate and consolidate employee feedback channels</li> <li>Evaluate potential connections between employee engagement and customer satisfaction</li> </ul>	<ul style="list-style-type: none"> <li>Use internal engagement measures to develop engagement strategies</li> <li>Develop process for analyzing and responding to employee feedback</li> <li>Create incentive structures that align employee performance with output and customer satisfaction</li> </ul>	<ul style="list-style-type: none"> <li>Establish real-time analysis and reporting of internal employee engagement measure</li> <li>Link SSA employee management with how they work with partner organizations to meet the needs of customers</li> </ul>
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# Wave 2 initiatives come from stakeholder\* input and leading practices

Initiative	Why we are recommending initiatives
Use internal engagement measures to develop engagement strategies	<b>External Research:</b> The Department of Veterans Affairs uses the VA All Employee Survey in addition to the Federal Viewpoint Survey to gauge employee engagement and develop strategies for improvement <b>Stakeholder Input:</b> Employees indicated there is a need to focus on employee engagement particularly during times of change and that the Federal Employee Engagement Survey does not accurately reflect engagement
Develop process for analyzing and responding to employee feedback	<b>External Research:</b> Department for Work and Pensions launched a Bright Ideas portal to encourage innovation and improvements, which are reviewed by colleagues and stakeholders
Create incentive structures that align employee performance with output and customer satisfaction	<b>Stakeholder Input:</b> Indicates the need to reward employees for going above and beyond serving customer needs vs. rewarding output
Create personalized development plans to include development programs and guidance on career path options	<b>External Research:</b> BlueCross BlueShield aligned strategic goals, performance reviews, and leadership development with defined competencies <b>Stakeholder Input:</b> Employees feel they are not aware of all career options across the agency
Develop content for and pilot dynamic training delivery models	<b>Stakeholder Input:</b> Employee feedback discussed the need for more engaging training delivery methods to better meet employee needs (e.g., VOD/ online training is not always the most effective for learning new information or processes)
Expand successful components of the talent and skills sharing platform	<b>External Research:</b> NASA has technical knowledge capture and transfer capabilities through the NESC Academy online tool for knowledge-sharing. Department of State implemented Flex Connect that provides employee profiles with skills to match roles <b>Stakeholder Input:</b> Indicated desire for more cross-component training and development rotations
Expand successful elements of flexibility programs	<b>External Research:</b> Federal Highways Administration implemented alternative duty locations to fill national positions at regional hubs. GSA invested in flexibility including, desk sharing, hot desking, open environment, and alternative work schedules. Miami-Dade County equipped case workers with camera-enabled smartphones and laptops to support paperwork completion in the field
Evaluate talent pipeline and prioritize relationships with providers of highest performing talent	<b>External Research:</b> The Federal Bureau of Investigations uses data analytics to identify universities with diverse student bodies and develops partnerships to enhance recruiting effectiveness
Communicate location of and add tools to Customer Response Toolkits	<b>Stakeholder Input:</b> Employees feel there are tools, websites, shortcuts, decision trees, etc. but they are not in a centralized location for easy access and use
Expand ideation platform to include full-funding model for ideas to improve SSA	<b>External Research:</b> The department for Work & Pensions provides funding and pilot support for ideas submitted through the Bright Ideas portal after they are reviewed and selected by colleagues and stakeholders. United States Citizenship and Immigration Service incentivized innovation challenges with low cost rewards (e.g., personal phone calls from Area Directors)

# Detailed descriptions of Wave 2 initiatives

Key: **Strategy**

- Initiative
- Initiative

## Wave 2: FY18-22

### Engagement

#### Employee Engagement Strategies

- Pilot, refine, and scale the internal employee engagement measure that captures key engagement information and distribute to all employees at set timeframes
- Transition from FEVS measure for engagement to the internally developed and refined employee engagement measure

#### Employee Feedback Mechanisms

- Consolidate feedback that is applicable to agency-wide efforts (e.g., feedback on the Vision)
- Create process for analyzing employee feedback to generate and provide insights to relevant stakeholders

#### Integrated Employee/Customer Management

- Align customer and employee engagement efforts so they clearly reinforce one another
- Expand performance measures to capture the impact of employee-focused initiatives on the customer experience

### Development

#### Employee Development Plans/Programs

- Transition competency model from role-based to employee-specific through personalized development plans
- Provide employees with guidance on potential career paths and development program opportunities within personalized development plans
- Consolidate similar employee development programs as they are incorporated into personalized development plans

#### Training

- Develop additional training content based on skill development needs of employees
- Research and pilot various training approaches based on role and desired outcome (e.g., developing customer experience skills may require in person simulation training instead of online)
- Capture and analyze training effectiveness data

#### knowledge-sharing

- Evaluate employee use of the talent and skills sharing platform current initiative (e.g., do employees use it to share best practices, collaborate across components, and better serve customers)
- Expand successful aspects of the talent and skills platform to additional mediums of communication through investing in infrastructure that enables knowledge-sharing across the organization

### Empowerment

#### Employee Flexibility

- Evaluate pilots and expand flexibility efforts across the entire organization with necessary training and process changes (e.g., field offices can establish “pop-up” SSA offices using mobile tech in disadvantaged communities to improve access)

#### Recruitment

- Analyze all talent needs and establish an annual cycle for recruiting from strategic partners that provide the best talent

#### Employee Ownership/ Accountability

- Expand to an enterprise ideation platform and institute enterprise processes to fund and support employee ideas through implementation
- Provide employees with personalized communications for resources available in customer response toolkits that directly apply to the decisions they make
- Add additional decision-support tools to customer response toolkits to expand ownership and accountability for decisions

# Wave 3 initiatives focus on further advancing “one government” strategies

	Wave 1a FY16	Wave 1b FY17	Wave 2 FY18-22	Wave 3 FY22-25
Engagement	<ul style="list-style-type: none"> <li>Engagement Toolkit</li> <li>Engagement Community of Practice</li> <li>IdeaScale software for employee feedback</li> </ul>	<ul style="list-style-type: none"> <li>Define internal employee engagement measurement and capture method</li> <li>Evaluate and consolidate employee feedback channels</li> <li>Evaluate potential connections between employee engagement and customer satisfaction</li> </ul>	<ul style="list-style-type: none"> <li>Use internal engagement measures to develop engagement strategies</li> <li>Develop process for analyzing and responding to employee feedback</li> <li>Create incentive structures that align employee performance with output and customer satisfaction</li> </ul>	<ul style="list-style-type: none"> <li>Establish real-time analysis and reporting of internal employee engagement measure</li> <li>Link SSA employee management with how they work with partner organizations to meet the needs of customers</li> </ul>
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# Wave 3 initiatives come from stakeholder\* input, leading practices, and additional Deloitte recommendations

Initiative	Why we are recommending initiatives
Establish real-time analysis and reporting of internal employee engagement measure	<b>Deloitte Recommendation:</b> As data analytics are used more within the organization, monitoring and evaluating employee engagement in real-time can provide leadership with the information and insights needed to adjust employee engagement strategies more frequently and create the ability to track the impact of actions taken
Link SSA employee management with how they work with partner organizations to meet the needs of customers	<b>Deloitte Recommendation:</b> As the link between employee engagement and customer satisfaction is better understood and partner organizations have more interaction with SSA, expanding employee management to include partner interactions can strengthen those partnerships
Explore expansions and improvements to external developmental programs and rotations	<b>Stakeholder Input:</b> Employee feedback reports interest around participating in external developmental programs or rotations to build their knowledge, skills, and professional experience
Dynamically adjust training delivery models and methods to develop priority skillsets	<b>Deloitte Recommendation:</b> As training delivery models continue to advance, exploring the best methods to train employees for key skills can ensure maximum knowledge retention
Expand knowledge-sharing infrastructure to external partners	<b>Deloitte Recommendation:</b> As SSA continues to exchange data and share talent and customers with partner organizations, a platform with increased capability for knowledge-sharing across partners can continue to advance employee knowledge and skills
Enhance flexible working options that align to changing employee needs	<b>External Research:</b> GSA continues to explore flexible working options to meet employee needs through a core belief that “Work is what we do, not where we are”
Explore alternative recruitment and talent employment models (e.g., short-term skills based)	<b>Deloitte Recommendation:</b> As workforce demographics and external trends continue to change, SSA’s workforce will need to be adaptive and agile, which may require SSA to explore different models for talent and recruitment
Expand ideation platforms to additional mediums (e.g., mobile) and external partners for input	<b>Deloitte Recommendation:</b> As technology continues to advance and the way people interact with it change, platforms for knowledge-sharing should reach employees and partner organizations through mediums that are user-friendly and convenient

# Detailed descriptions of Wave 3 initiatives

Key: **Strategy**

- Initiative
- Initiative

## Wave 3: FY22-25

### Engagement

#### Employee Engagement Strategies

- Analyze and track the employee engagement measure across all employees segments to continuously inform employee engagement strategies and align with changing needs and trends

#### Employee Feedback Mechanisms

- Determine which aspects of the employee engagement measure is most beneficial and begin capturing and reporting in real-time

#### Integrated Employee/Customer Management

- Determine SSA employee roles that have consistent interactions with partner organizations
- Create incentive structure for SSA employees to effectively work with partner organization to meet customer needs

### Development

#### Employee Development Plans/Programs

- Support staff in professional and personal learning
- Expand opportunities for external development programs and rotations with strategic partners (e.g., a six-month externship with an outreach organization)

#### Training

- Determine complex on-the-job scenarios where employees frequently encounter problems/roadblocks
- Develop immersive simulation training for these employees to help them better navigate these environments (e.g., employee training takes place in a virtual reality environment where employees interact with customer avatars to meet their changing and evolving needs)

#### knowledge-sharing

- Determine key expertise areas where partner organizations can share knowledge and develop employees
- Establish infrastructure for facilitating knowledge exchange across SSA and partners

### Empowerment

#### Employee Flexibility

- Shift flexibility options as technology advances continue and employee needs change
- Continually assess organizational structure in ability to facilitate employee flexibility

#### Recruitment

- Research trends in alternative recruitment and hiring models and determine feasibility and fit for SSA (e.g., short-term contracts for a specific skill)
- Pilot and scale feasible alternative models that fit talent needs

#### Employee Ownership/ Accountability

- Determine barriers to participation in the ideation platform and expand reach through exploring additional medium (e.g., mobile application or mobile messaging)

# These waves combined create the Vision Roadmap for exceptional employees

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## Innovative Organization



In 2025, we are recognized by the public and across government for our agility and effectiveness in fulfilling our mission. We meet the changing needs of our customers and keep pace with the transitions they experience in their lives.

# SSA set bold objectives for creating innovation throughout the organization



## Innovative Organization:

*SSA is an adaptive organization that embraces changes to meet the future needs of its customers and employees*

### Vision Objectives



#### Continuous Improvement

SSA has established feedback and improvement mechanisms that are driven by data-sharing and inform advancement of SSA's processes, policies, and programs.

**By 2025...** SSA actively uses data analysis to evaluate internal processes, identifies key parts of the processes that cause backlogs and extended wait-times, implements pilots, and scales successful pilots to significantly reduce the time spent on processes.



#### Adaptive Culture

SSA has an organizational structure and leadership team that recognizes, adapts, and develops change in innovative and impactful ways.

**By 2025...** SSA employees see the transformational ideas they submit for change evaluated and acted upon, receive communications on progress of change initiatives across SSA, and feel innovation is important to leadership and fostered throughout the organization.



#### Customer-Centric Infrastructure

SSA has modernized, secure, and flexible IT and physical infrastructures that are driven by customer need and aim to meet or exceed customer expectations.

**By 2025...** A customer walks into a field office, is welcomed, and easily knows where to go in the office. The customer inquires about a pending case and the field office employee is able to quickly address the question by using a one view capability and is also able to inform the customer of additional relevant information.



# We developed strategies and quantifiable outcomes\* based on objectives



## Innovative Organization:

*SSA is an adaptive organization that embraces changes to meet the future needs of its customers and employees*

**Overall Measure: An organizational efficiency index\*\***

### Vision Strategies:



#### Continuous Improvement

- **Process Efficiency:** Identifies and streamlines inefficiencies in processes to reduce the time to complete transactions and serve customer needs
- **Improper Payments/Fraud Prevention:** Reduces and prevents payments made in error and fraudulent activities
- **Data Exchange:** Shares data with external organizations to create efficiencies and better outcomes for customers
- **Data Analytics:** Develops a comprehensive understanding of data across processes and services to gain insights into operations and to inform decision-making

**Outcome:** SSA has the ability to digitally exchange data with all appropriate federal and state agencies

**Outcome:** All SSA improper payments caused by internal errors are eliminated

**Outcome:** All internal processes have been evaluated and streamlined

**Outcome:** All agency decisions are supported and backed up by data



#### Adaptive Culture

- **Change Culture:** Promotes change and encourages employees to create innovative ways to meet customer needs
- **Executive Accountability:** Establishes organizational structures to create visibility and hold leadership accountable to achieving change across the agency

**Outcome:** All employees feel SSA leaders support a culture that rewards risk and innovation



#### Customer-Centric Infrastructure

- **Technology Modernization:** Updates systems and architecture to better engage SSA employees and position them to serve changing customer behaviors and needs
- **Cyber Security:** Maintains security of customer and employee data through secure technology infrastructure that proactively mitigates threats
- **Physical Infrastructure:** Designs physical locations to support employees in meeting customer needs and creating a superior customer experience

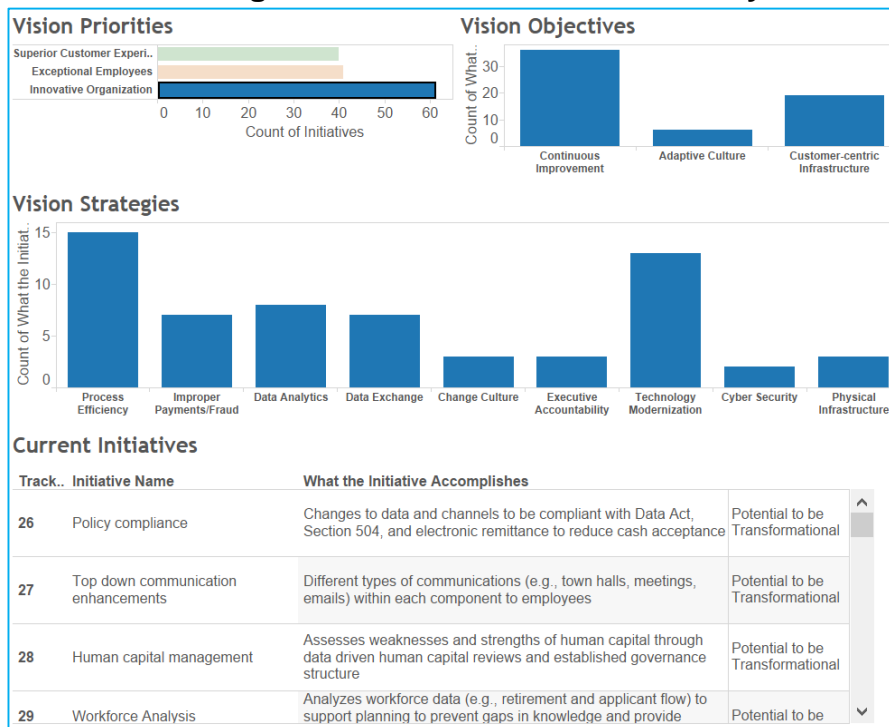
**Outcome:** SSA has one-view of customer data across the agency

**Outcome:** SSA's cyber security capabilities are in line with leading industry practices (e.g., use of maturity model)

**Outcome:** SSA field offices are designed and operate based on customer needs

# Many current initiatives support these outcomes

## Innovative Organization Current Initiative Analysis



We developed an interactive dashboard that allows users to see the alignment of current initiatives to the Vision.



### Continuous Improvement current initiatives will...

- Create **process efficiencies in specific services and internal processes** (e.g., automation in disability reviews)
- Work to **address reasons for errors** in payments and create **methods for locating and addressing fraud** (e.g., Anti-fraud office)
- **Establish data-sharing partnerships** with state governments, other federal agencies, and financial institutions (e.g., financial data exchange)
- Focus data analytics efforts on **aspects of workforce** (e.g., workload, retirements and applicant trends) and **use predictive analytics** in disability case processing and fraud prevention



### Adaptive Culture current initiatives will...

- Provide transparency and oversight for **IT investments and policy mandates** (e.g., Strategic IT Assessment and Review Board)
- **Improve communications** from leadership to employees around changes (e.g., top-down communications methods like town halls)



### Customer-Centric Infrastructure current initiatives will...

- Begin to **modernize outdated technology** and **consolidate systems for disability processing** (e.g., modernization to support paperless processing)
- **Create access controls** for all online services and employee information access (e.g., information security program)
- **Change physical footprints while establishing new spaces** (e.g., ODAR office expansion)

# Gaps remain in realizing these outcomes

## Overarching Innovative Organization Gap: Customer-centric technology modernization



### Continuous Improvement

**Outcome:** SSA has the ability to digitally exchange data with all appropriate federal and state agencies

**Outcome:** All SSA improper payments caused by internal errors are eliminated

**Outcome:** All internal processes have been evaluated and streamlined

**Outcome:** All agency decisions are supported and backed up by data

#### Gaps:

- SSA **lacks a mature continuous process improvement mechanism** and culture
- SSA's data exchanges are **limited in sharing capabilities and data quality**
- SSA **is not fully employing an analytics-driven approach to analyze internal processes**
- SSA does not proactively identify and **prevent all root causes of non-fraudulent improper payments**



### Adaptive Culture

**Outcome:** All employees feel SSA leaders support a culture that rewards risk and innovation

#### Gaps:

- SSA **has not fully built a culture of transformational leadership** to lead cultural change initiatives that create a safe environment for risks and innovation
- SSA's **employees feel they lack direct involvement in developing solutions** that lead to organizational change
- SSA has **not fully aligned executive accountability measures with transformation**



### Customer-Centric Infrastructure

**Outcome:** SSA has one-view of customer data across the agency

**Outcome:** SSA's cyber security capabilities are in line with leading industry practices (e.g., use of maturity model)

**Outcome:** SSA field offices are designed and operate based on customer needs

#### Gaps:

- SSA's technology **lacks a agile and streamlined system architecture**
- SSA's technology investments are **not always driven by customer need**
- SSA **does not consistently use customer insights to drive strategies for physical infrastructure design and investment**
- SSA's cybersecurity needs to continually **adapt to the changing cybersecurity environment**

# We subjectively determined the scale of these gaps

Subjective measurement of the gaps are provided below based on Vision objective outcomes and current initiatives qualitative outcomes. Adaptive culture is further along the continuum as SSA has published a transformational vision and recognized the importance of transformational leadership.

## Scoring Criteria

3: Significant progress towards achieving objective; minimal gaps remain

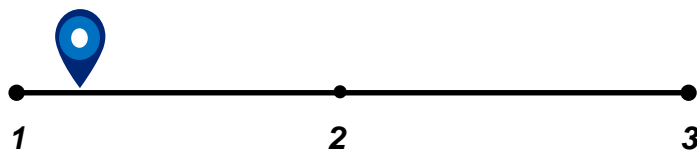
2: Progress towards achieving objective; gaps remain

1: Minimal progress towards achieving objective; significant gaps remain

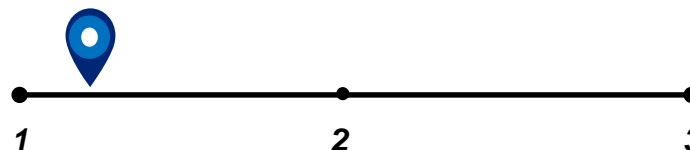


## Innovative Organization

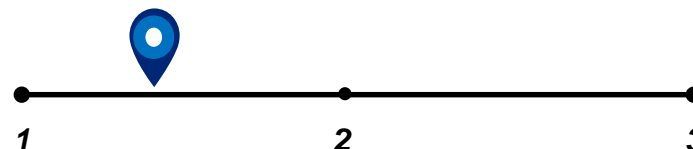
Average Score:



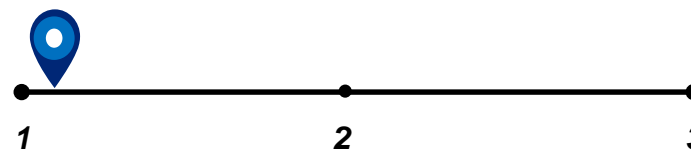
## Continuous Improvement



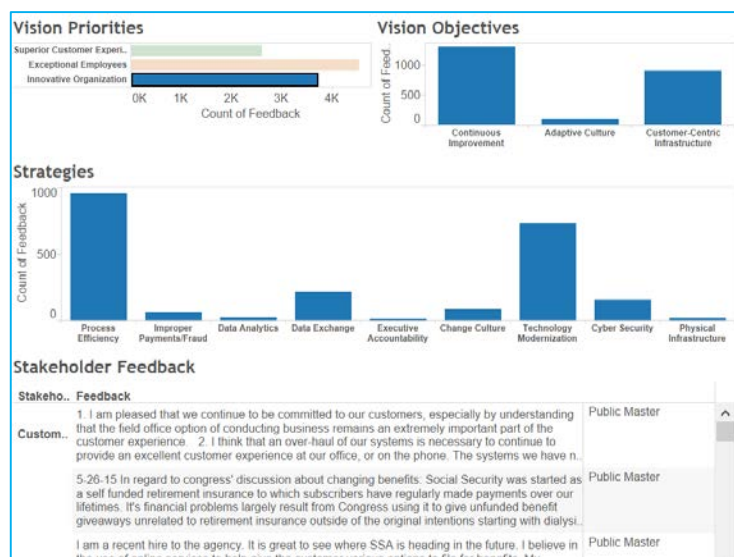
## Adaptive Culture



## Customer-Centric Infrastructure



# SSA stakeholders\* provided input that help fill existing gaps



We developed an interactive dashboard that allows users to see stakeholder input aligned to the Vision

## Continuous Improvement

- **Increase data-sharing across state and federal agencies** and hospitals to improve the customer experience (e.g., integrate medical records and State DDS files)
- **Increase accuracy** of reporting systems to maintain accurate records and **increase use of data analytics to drive decision-making**
- **Update rules and regulations** for programs in coordination with any process and technology improvements in order to make adjudication or determinations simpler (e.g., reduce the number of exceptions to policy and program requirements)
- **Find opportunities to streamline processes** (e.g., incorporate automated decision-making tools for program determinations)

## Adaptive Culture

- **Provide greater support to employees to try new ideas or innovate** in an environment where it's ok to fail (e.g., currently employees feel there is little "air cover" from management/ leadership due to the focus on daily output)
- **Encourage employees to think of ways to continuously improve** (e.g., communicate how employee feedback led to improvements across the agency)
- **Utilize more well-designed pilots** when rolling out new process and/ or technology changes
- **Minimize the stratification across levels** of the agency (e.g., eliminate positional barriers enforcing "command and control" hierarchy)

## Customer-Centric Infrastructure

- **Build one view of the customer** to share and streamline information across components and other agencies through integrated back-end systems
- **Increase stability and reliability of technology systems for both customers and employees** (e.g., constant patches and repairs of legacy systems results in new changes being rolled out frequently, making things more complicated and causing system outages)
- **Enhance cybersecurity methods and strategies** to promote confidence in customers and employees in using online services

# We also used leading practices from external research



**Integrate continuous improvement** across the organization (e.g., Environmental Protection Agency uses Lean and Six Sigma methods across headquarters, regional offices, and state environmental agencies)



**Unify databases** to improve process efficiencies, data quality, and analysis capabilities (e.g., a large financial institution overhauled database structure and implemented a new reporting application to use newly unified databases)



**Use analytics tools to support decision-making** and drive improvements (e.g., Department of Veterans Affairs' weekly analytic tool that predicts likelihood of patient hospitalization)



**Assess risk across the organization** by monitoring threats and vulnerabilities and instituting issue resolution structure (e.g., Department of State's automated and dynamic scorecard that constantly assesses risk across the organization)



**Create accountability for transformation** for executives and leaders across the organization (e.g., Department of Veteran Affairs transformational leadership strategies)



**Exchange data to support fulfilling mission outcomes** (e.g., USAID's data exchange with other agencies to predict famine across the world)



# Current initiatives, stakeholder\* input, and leading practices create the Vision Roadmap for becoming an innovative organization

## Current Initiatives Stakeholder input Leading practices



# Wave 1a focuses on current initiatives

	Wave 1a FY16	Wave 1b FY17	Wave 2 FY18-22	Wave 3 FY22-25
Continuous Improvement	<ul style="list-style-type: none"> <li>▪ Critical Eight: Accelerate use of data-driven decision-making</li> <li>▪ Data exchange CoP</li> <li>▪ Public-private CoE</li> <li>▪ Workforce analytics</li> <li>▪ Predictive modeling in continuing disability reviews and redeterminations</li> <li>▪ Continuous quality improvement reviews</li> <li>▪ Anti-fraud infrastructure</li> <li>▪ Virtual lifetime electronic record</li> </ul>	<ul style="list-style-type: none"> <li>▪ Assess continuous quality review initiative and develop expansion strategy to process improvements</li> <li>▪ Determine reach of current data exchanges and capabilities of CoP and CoE</li> <li>▪ Evaluate additional internal processes that can benefit from analytics for decisions</li> <li>▪ Establish processes to address improper payment root causes</li> </ul>	<ul style="list-style-type: none"> <li>▪ Formalize capture of and action on process improvement</li> <li>▪ Explore more rigorous forms of creating process efficiencies</li> <li>▪ Identify and address barriers to scaling data exchanges</li> <li>▪ Integrate real-time data analytics capabilities and visualization across all relevant internal processes</li> <li>▪ Use understanding of root causes to reduce OASDI** overpayment to the target level</li> </ul>	<ul style="list-style-type: none"> <li>▪ Expand evaluation and creation of process efficiencies to strategic partner organizations</li> <li>▪ Explore shared view of the customer across government agencies through seamlessly integrated data across all agency partners</li> <li>▪ Identify latest data analytic capabilities and integrate into internal and customer-facing processes</li> </ul>
Adaptive Culture	<ul style="list-style-type: none"> <li>▪ Critical Eight: Establish the enterprise program management office</li> <li>▪ Policy compliance</li> <li>▪ Top-down communication enhancements</li> <li>▪ Human capital management</li> <li>▪ Virtual hallway</li> <li>▪ Strategic IT Investment Process</li> </ul>	<ul style="list-style-type: none"> <li>▪ Expand current methods for communicating change initiatives and engaging employees</li> <li>▪ Develop communications and incentives structure for promoting employee use of the ideation platform for innovative ideas</li> <li>▪ Identify transformational leaders throughout SSA</li> </ul>	<ul style="list-style-type: none"> <li>▪ Promote employees engagement through involvement in working groups</li> <li>▪ Reinforce leadership messaging of support for innovative ideas and provide implementation successes</li> <li>▪ Reward knowledge-sharing and collaboration through performance management and rewards programs</li> </ul>	<ul style="list-style-type: none"> <li>▪ Explore new mediums for communicating with and engaging employees in change initiatives</li> <li>▪ Integrate transformation leaders across strategic partners in SSA culture changes</li> <li>▪ Reflect culture of continuous development and learning in personal development plans</li> </ul>
Customer-Centric Infrastructure	<ul style="list-style-type: none"> <li>▪ Critical Eight: Transform IT investment process</li> <li>▪ Disability case processing system</li> <li>▪ Medicare database enhancements</li> <li>▪ Authentication</li> <li>▪ Footprint reduction</li> </ul>	<ul style="list-style-type: none"> <li>▪ Assess IT infrastructure for modernization, consolidation, and integration points across all systems</li> <li>▪ Expand multifactor identification across all customer online accounts</li> <li>▪ Establish a link between customer insights and technology and physical infrastructure</li> </ul>	<ul style="list-style-type: none"> <li>▪ Research, test, and invest in technology that replaces outdated IT infrastructure and enables one view of customers</li> <li>▪ Expand multifactor identification across all service channels</li> <li>▪ Pilot and implement changes to office layouts and self-help spaces to improve customer experiences</li> </ul>	<ul style="list-style-type: none"> <li>▪ Explore technology investments that jump the technology modernization gap with strategic partners*</li> <li>▪ Implement adaptive smart software to elude cyber attacks</li> <li>▪ Explore adaptations to physical infrastructure that further support partnerships between agencies</li> </ul>



# Detailed descriptions of Wave 1a initiatives currently underway

## Key: Strategy

- Initiative
- Initiative

## Wave 1a: FY16

### Continuous Improvement

#### Process Efficiency

- Continuous quality improvement reviews - Compiles recommendations for improvement and then plans, evaluates, and implements outcome-based process and automation improvements across service delivery components

#### Improper Payments/Fraud Prevention

- Anti-fraud infrastructure - Stands up anti-fraud program, office, and committee

#### Data Analytics

- Critical Eight: Accelerate use of data-driven decision-making - Uses collected data to identify patterns and improve customer service and investigates new ways data can be leveraged to anticipate customer and agency needs
- Workforce analytics - Analyzes workforce data (e.g., retirement and applicant flow) to support planning, prevent gaps in knowledge, and provide updates to diversity and inclusion councils
- Predictive modeling in continuing disability reviews and redeterminations - Identifies Social Security disability beneficiaries whose earnings put them at risk of receiving overpayments and prioritizes cases that have a high likelihood of error

#### Data Exchange

- Data exchange Community of Practice - Collaborates on data exchange activities, shares best practices, finds common solutions to data exchange challenges, and builds a network of federal data exchange partners
- Public-private Center of Excellence - Meets with private, state, and Federal stakeholders to identify ways to streamline health and human services by approaching data as a strategic resource, identifying needs, and leveraging technology to share data
- Virtual lifetime electronic record - Automates access to medical records across DoD, VA, and SSA for Veterans and service members

#### Change Culture

- top-down communication enhancements - Provides different types of communications (e.g., town halls, meetings, emails) within each component to employees
- Human capital management - Assesses weaknesses and strengths of human capital through data-driven human capital reviews and established governance structure
- Virtual hallway - Connects employees across offices virtually using technology

#### Executive Accountability

- Critical Eight: Establish the enterprise program management office - Improves oversight and transparency to develop and deploy projects on time, within budget, and with quality results
- Policy compliance - Changes to data and channels to be compliant with mandates
- Strategic IT Investment Process - Provides governance and oversight of IT investments

#### Technology Modernization

- Transform the IT Investment Process – Streamlines the IT investment process to be responsive to customer needs
- Disability case processing system - Replaces 54 systems to provide common functionality and consistent support to each disability determination system (DDS)
- Medicare database enhancements - Structures the Medicare databases to enhance internal and external processing of cases

#### Cyber Security

- Authentication - Ensures the privacy and security of personal information but currently does not support all online services

#### Physical Infrastructure

- Footprint reduction - Reduces physical space and creates shared spaces (e.g., consolidated field and hearing offices)

### Adaptive Culture

### Customer-Centric Infrastructure

# Recommendations for maximizing impact of some current initiatives

The recommendations below are based on insights gained during interviews with component representatives.

Current Initiative	Recommendations to maximize impact...
Critical Eight: Accelerate use of data-driven decision-making	Document lessons learned from data-driven decision-making pilots and expansions
Predictive modeling in continuing disability reviews and redeterminations	Document lessons learned and software used to create predictive modeling capabilities
Anti-fraud infrastructure	Use customer analytics and fraud analytics to inform strategies for physical location expansion efforts (e.g., 6 offices instead of 9 offices are currently controlled by budget instead of strategy)
Virtual lifetime electronic record	Increase number of target electronic record
top-down communication enhancements	Coordinate across components to ensure consistent messaging and tone to support culture initiatives and leadership messaging
Human capital management	Determine if human capital review is flexible and adaptive to include changes to performance measures of employees and if HRStat results are used to make decisions and communicate results across components
Virtual hallway	Document lessons learned from virtual pilots and connectivity between offices
Strategic IT Investment Process	Ensure IT investments are evaluated based on ability to integrate and facilitate superior customer experience and ease of service delivery
Critical Eight: Transform IT investment process	Ensure strategic criteria used to evaluate IT investments includes customer-centric measures
Disability case processing system	Document lessons learned from integration efforts

# Wave 1b focuses on recommended initiatives that further build the foundation for transformation

	Wave 1a FY16	Wave 1b FY17	Wave 2 FY18-22	Wave 3 FY22-25
Continuous Improvement	<ul style="list-style-type: none"> <li>Critical Eight: Accelerate use of data-driven decision-making</li> <li>Data exchange CoP</li> <li>Public-private CoE</li> <li>Workforce analytics</li> <li>Predictive modeling in continuing disability reviews and redeterminations</li> <li>Continuous quality improvement reviews</li> <li>Anti-fraud infrastructure</li> </ul>	<ul style="list-style-type: none"> <li>Assess continuous quality review initiative and develop expansion strategy to process improvements</li> <li>Determine reach of current data exchanges and capabilities of CoP and CoE</li> <li>Evaluate additional internal processes that can benefit from analytics for decisions</li> <li>Establish processes to address improper payment root causes</li> </ul>	<ul style="list-style-type: none"> <li>Formalize capture of and action on process improvement</li> <li>Explore more rigorous forms of creating process efficiencies</li> <li>Identify and address barriers to scaling data exchanges</li> <li>Integrate real-time data analytics capabilities and visualization across all relevant internal processes</li> <li>Use understanding of root causes to reduce OASDI** overpayment to the target level</li> </ul>	<ul style="list-style-type: none"> <li>Expand evaluation and creation of process efficiencies to strategic partner organizations</li> <li>Explore shared view of the customer across government agencies through seamlessly integrated data across all agency partners</li> <li>Identify latest data analytic capabilities and integrate into internal and customer-facing processes</li> </ul>
Adaptive Culture	<ul style="list-style-type: none"> <li>Critical Eight: Establish the enterprise program management office</li> <li>Policy compliance</li> <li>top-down communication enhancements</li> <li>Human capital management</li> <li>Virtual hallway</li> <li>Strategic IT Assessment and Review Board (SITAR)</li> </ul>	<ul style="list-style-type: none"> <li>Expand current methods for communicating change initiatives and engaging employees</li> <li>Develop communications and incentives structure for promoting employee use of the ideation platform for innovative ideas</li> <li>Identify transformational leaders throughout SSA</li> </ul>	<ul style="list-style-type: none"> <li>Promote employees engagement through involvement in working groups</li> <li>Reinforce leadership messaging of support for innovative ideas and provide implementation successes</li> <li>Reward knowledge-sharing and collaboration through performance management and rewards programs</li> </ul>	<ul style="list-style-type: none"> <li>Explore new mediums for communicating with and engaging employees in change initiatives</li> <li>Integrate transformation leaders across strategic partners in SSA culture changes</li> <li>Reflect culture of continuous development and learning in personal development plans</li> </ul>
Customer-Centric Infrastructure	<ul style="list-style-type: none"> <li>Critical Eight: Transform IT investment process</li> <li>Disability case processing system</li> <li>Medicare database enhancements</li> <li>Authentication</li> <li>Footprint reduction</li> </ul>	<ul style="list-style-type: none"> <li>Assess IT infrastructure for modernization, consolidation, and integration points across all systems</li> <li>Expand multifactor identification across all customer online accounts</li> <li>Establish a link between customer insights and technology and physical infrastructure</li> </ul>	<ul style="list-style-type: none"> <li>Research, test, and invest in technology that replaces outdated IT infrastructure and enables one view of customers</li> <li>Expand multifactor identification across all service channels</li> <li>Pilot and implement changes to office layouts and self-help spaces to improve customer experiences</li> </ul>	<ul style="list-style-type: none"> <li>Explore technology investments that jump the technology modernization gap with strategic partners*</li> <li>Implement adaptive smart software to elude cyber attacks</li> <li>Explore adaptations to physical infrastructure that further support partnerships between agencies</li> </ul>

# Wave 1b recommended initiatives come from stakeholder\* input and leading practices

Initiative	Why we are recommending initiatives
Assess continuous quality review initiative and develop expansion strategy to process improvements	<b>External Research:</b> The Environmental Protection Agency integrated continuous improvement across headquarters, regional offices, and state environmental agencies to make process and quality improvements
Determine reach of current data exchanges and capabilities of CoP and CoE	<b>External Research:</b> USAID improved its ability to predict when and where famines could occur across the world using inter-agency data exchange and analysis agreements between USGS, NASA, and NOAA <b>Stakeholder Input:</b> Indicates the desire to increase internal and external data-sharing collaboration
Evaluate additional internal processes that can benefit from analytics for decisions	<b>External Research:</b> The Department of Veterans Affairs expanded analytics to create a Care Assessment Needs score that predicts the likelihood of hospitalization or death within 90 days to a year to proactively identify high-risk patients and provide targeted interventions before hospitalizations
Establish processes to address improper payment root causes	<b>External Research:</b> United States Department of Labor has fought rising improper payments by defining seven strategies for reducing improper payments, sharing best practices across the organization, and determining root causes at the organization and state level. United States Department of Agriculture targeted aspects of improper payments to reduce through a study to track improper payments, redesigned review processes, and designed a prototype with OPM
Expand current methods for communicating change initiatives and engaging employees	<b>External Research:</b> The Department of Veterans Affairs made leaders accountable for employee engagement and also communicated progress of changes and improvements to all levels of the organization by using a communications cascade to push messaging through managers to front line staff <b>Stakeholder Input:</b> Employees want to know how their feedback leads to process and technology improvements
Develop communications and incentives structure for promoting employee use of the ideation platform for innovative ideas	<b>External Research:</b> The United States Customs and Immigration Services incentivized staff with creative, low-cost rewards (e.g., Area Directors would personally call and thank an outstanding employee) for participating in change initiatives

# Wave 1b recommended initiatives come from stakeholder\* input and leading practices

Initiative	Why we are recommending initiatives
Identify transformational leaders throughout SSA	<b>External Research:</b> The Department of Veterans Affairs made leaders accountable for employee engagement, engaged leaders as teachers to demonstrate the behaviors needed to move the organization toward the desired future state, focused on leader performance and building a leader performance scorecard to hold executives accountable for the change, and equipped leadership with an Employee Engagement Playbook to support their ability to meet performance goals
Assess IT infrastructure for modernization, consolidation, and integration points across all systems	<b>External Research:</b> A large financial institution with disparate databases and poor data quality revised and unified the standards for encoding financial data and overhauled their database structure. The United States Department of Health and Human Services determined they could integrate network security systems to create a single clearinghouse that improved security capabilities <b>Stakeholder Input:</b> Indicates the need for increased system stability and reliability
Expand multifactor identification across all customer online accounts	<b>Stakeholder Input:</b> Current initiatives interview with Operations revealed that multi-factor identification will continue to be rolled out across online accounts to enhance security of customer data
Establish a link between customer insights and technology and physical infrastructure	<b>External Research:</b> USAA uses it's consolidated customer experience structure to inform organizational decisions to reinforce customer-centricity including, evaluation of technology investments based on customer impact

# Detailed descriptions of Wave 1b initiatives

**Key: Strategy**

- Initiative
- Initiative

**Wave 1b: FY17**
**Continuous  
Improvement**
**Process Efficiency**

- Determine capabilities and reach of the continuous quality review initiative and assess ability to scale to a process improvement tool
- Set infrastructure for collecting, managing, and implementing process improvement ideas

**Improper Payments/Fraud Prevention**

- Assess the thoroughness of current improper payment prevention to develop an understanding of internal capability gaps
- Expand understanding of root causes of improper payments categorized by OMB\* to include additional organizational details that are able to be analyzed to determine solutions to improper payments

**Data Analytics**

- Assess level of data analytics capabilities and use across the organization (e.g., predictive analytics in disability cases, ACE)
- Identify areas where increased understanding of data will support workload management, understanding of customers, and management of internal processes (e.g., real-time wait-times for offices available online, visualization of budget, finance, and quality data to identify trends, geospatial analytics for field office to anticipate changes in customer base)

**Data Exchange**

- Assess current organizational data-sharing capabilities, including, alignment of data exchanges to fulfilling a specific organizational need, ability of technology to make accurate and seamless exchanges, and governance structure for managing exchanges
- Identify existing and new data exchanges that have potential to increase payment accuracy and customer experience (e.g., financial institution and prison data exchanges)

**Adaptive  
Culture**
**Change Culture**

- Expand communications from component agency-wide focus for change initiatives (e.g., communications reach the field and all components in a manner that supports unified change)
- Investigate structures for engaging employees in implementation of change initiatives and develop engagement plan
- Communicate ideation platform's purpose, capabilities, and value to all employees and provide incentives for its use

**Executive Accountability**

- Identify and gain support from leaders that creates a safe environment for employees to innovate, take risks, and support ambition
- Increase transparency through communications of SSA's objectives, goals, and progress measures

**Technology Modernization**

- Review all systems for high maintenance costs, redundancies, inability to integrate with other systems, and missing capabilities that if updated, would support customer-centric view of information, agency-wide data analysis, and improved efficiencies\*\*
- Develop strategy for large scale technology modernization across the agency that supports customer-centricity

**Cyber Security**

- Inventory all privileged and unprivileged IT access across the enterprise for all systems
- Deploy alternate systems and honeypots to learn latest tactics threatening SSA's infrastructure
- Provide secure interfaces to communicate data and processes for health and citizen information exchanges
- Secure PII/SSN by deploying multi-factor identification across all online channels (e.g., text/email sent in addition to password entry)

**Physical Infrastructure**

- Establish Link between physical infrastructure changes and targeted strategies from customer data (e.g., a field office gains video capabilities based on consolidated customer data analytics that indicated it would improve customer experience in that area)

# Wave 2 initiatives focus on creating transformation

	Wave 1a FY16	Wave 1b FY17	Wave 2 FY18-22	Wave 3 FY22-25
Continuous Improvement	<ul style="list-style-type: none"> <li>Critical Eight: Accelerate use of data-driven decision-making</li> <li>Data exchange CoP</li> <li>Public-private CoE</li> <li>Workforce analytics</li> <li>Predictive modeling in continuing disability reviews and redeterminations</li> <li>Continuous quality improvement reviews</li> <li>Anti-fraud infrastructure</li> </ul>	<ul style="list-style-type: none"> <li>Assess continuous quality review initiative and develop expansion strategy to process improvements</li> <li>Determine reach of current data exchanges and capabilities of CoP and CoE</li> <li>Evaluate additional internal processes that can benefit from analytics for decisions</li> <li>Establish processes to address improper payment root causes</li> </ul>	<ul style="list-style-type: none"> <li>Formalize capture of and action on process improvement</li> <li>Explore more rigorous forms of creating process efficiencies</li> <li>Identify and address barriers to scaling data exchanges</li> <li>Integrate real-time data analytics capabilities and visualization across all relevant internal processes</li> <li>Use understanding of root causes to reduce OASDI** overpayment to the target level</li> </ul>	<ul style="list-style-type: none"> <li>Expand evaluation and creation of process efficiencies to strategic partner organizations</li> <li>Explore shared view of the customer across government agencies through seamlessly integrated data across all agency partners</li> <li>Identify latest data analytic capabilities and integrate into internal and customer-facing processes</li> </ul>
Adaptive Culture	<ul style="list-style-type: none"> <li>Critical Eight: Establish the enterprise program management office</li> <li>Policy compliance</li> <li>top-down communication enhancements</li> <li>Human capital management</li> <li>Virtual hallway</li> <li>Strategic IT Assessment and Review Board (SITAR)</li> </ul>	<ul style="list-style-type: none"> <li>Expand current methods for communicating change initiatives and engaging employees</li> <li>Develop communications and incentives structure for promoting employee use of the ideation platform for innovative ideas</li> <li>Identify transformational leaders throughout SSA</li> </ul>	<ul style="list-style-type: none"> <li>Promote employees engagement through involvement in working groups</li> <li>Reinforce leadership messaging of support for innovative ideas and provide implementation successes</li> <li>Reward knowledge-sharing and collaboration through performance management and rewards programs</li> </ul>	<ul style="list-style-type: none"> <li>Explore new mediums for communicating with and engaging employees in change initiatives</li> <li>Integrate transformation leaders across strategic partners in SSA culture changes</li> <li>Reflect culture of continuous development and learning in personal development plans</li> </ul>
Customer-Centric Infrastructure	<ul style="list-style-type: none"> <li>Critical Eight: Transform IT investment process</li> <li>Disability case processing system</li> <li>Medicare database enhancements</li> <li>Authentication</li> <li>Footprint reduction</li> </ul>	<ul style="list-style-type: none"> <li>Assess IT infrastructure for modernization, consolidation, and integration points across all systems</li> <li>Expand multifactor identification across all customer online accounts</li> <li>Establish a link between customer insights and technology and physical infrastructure</li> </ul>	<ul style="list-style-type: none"> <li>Research, test, and invest in technology that replaces outdated IT infrastructure and enables one view of customers</li> <li>Expand multifactor identification across all service channels</li> <li>Pilot and implement changes to office layouts and self-help spaces to improve customer experiences</li> </ul>	<ul style="list-style-type: none"> <li>Explore technology investments that jump the technology modernization gap with strategic partners*</li> <li>Implement adaptive smart software to elude cyber attacks</li> <li>Explore adaptations to physical infrastructure that further support partnerships between agencies</li> </ul>



# Wave 2 initiatives come from stakeholder\* input, and leading practices

Initiative	Why we are recommending initiatives
Formalize capture of and action on process improvement	<b>External Research:</b> The Environmental Protection Agency uses formal process improvement strategies (e.g., Lean Six Sigma) to evaluate and implement continuous improvement efforts
Explore more rigorous forms of creating process efficiencies	<b>External Research:</b> The Environmental Protection Agency integrates continuous improvement across headquarters, regional offices, and state environmental agencies to make process and quality improvements and uses formal process improvement strategies to evaluate and implement continuous improvement efforts including Lean Six Sigma
Identify and address barriers to scaling data exchanges	<b>External Research:</b> USAID improved its ability to predict when and where famines could occur across the world using inter-agency data exchanges and overcoming data and expertise barriers <b>Stakeholder Input:</b> Reported need to continue growing data-sharing capabilities with federal and private organizations
Integrate real-time data analytics capabilities and visualization across all relevant internal processes	<b>External Research:</b> A large financial institution unified the standards for encoding financial data and overhauled their database structure to unify databases, which enabled creation of new reports and dashboards to visualize data and support data-driven decisions <b>Stakeholder Input:</b> Indicates the desire to increase use of data analytics to drive decision-making across the agency
Use understanding of root causes to reduce OASDI** overpayment to the target level	<b>External Research:</b> United States Department of Labor has fought rising improper payments by defining seven strategies for reducing improper payments, sharing best practices across the organization, and determining root causes at the organization and state level
Promote employees engagement through involvement in working groups	<b>External Research:</b> The United States Customs and Immigration Services created outlets for employees to participate in and create changes including innovation challenges <b>Stakeholder Input:</b> Employees want the opportunity to be directly involved in transformation

78 \* Stakeholders include: employees, customers, and external constituents (e.g., advocacy and congressional groups)

\*\* <https://www.ssa.gov/finance/2015/Improper%20Payments.pdf>

Case studies can be found in Appendix B: External research (includes further details and descriptions of impacts)



## Wave 2 initiatives come from stakeholder\* input, and leading practices

Initiative	Why we are recommending initiatives
Reinforce leadership messaging of support for innovative ideas and provide implementation successes	<b>External Research:</b> The Department of Veterans Affairs made leaders accountable for employee engagement, engaged leaders as teachers to demonstrate the behaviors needed to move the organization toward the desired future state, focused on leader performance and building a leader performance scorecard to hold executives accountable for the change, and equipped leadership with an Employee Engagement Playbook to support their ability to meet performance goals
Reward knowledge-sharing and collaboration through performance management and rewards programs	<b>External Research:</b> The United States Customs and Immigration Services incentivized staff with creative, low-cost rewards (e.g., Area Directors would personally call and thank an outstanding employee) for participating in change initiatives
Research, test, and invest in technology that replaces outdated IT infrastructure and enables one view of customers	<b>External Research:</b> The Australian government's Centrelink integrated its systems with citizen's electronic medical files through the national eHealth system to create common views of the customer, which has helped Australia have one of the quickest disability claims processing times in the world despite one of the highest disability rates among comparable countries <b>Stakeholder Input:</b> Employees shared the need to streamline information to build a centralized customer view
Expand multifactor identification across all service channels	<b>External Research:</b> Intel launched a pilot to assess its cybersecurity maturity with the National Institute of Standards and Technology's (NIST) Cyber Security framework to create a unified understanding of its cybersecurity capabilities and gaps, which informed the creation of new tools and dashboards to manage cybersecurity
Pilot and implement changes to office layouts and self-help spaces to improve customer experiences	<b>External Research:</b> Las Vegas Department of Motor Vehicles piloted and expanded channels to online and self service options based on understanding of customer needs. <b>Stakeholder Input:</b> Employees reported issues with current self-help kiosks in field offices

# Detailed descriptions of Wave 2 initiatives

**Key: Strategy**

- Initiative
- Initiative

## Wave 2: FY18-22

### Continuous Improvement

#### Process Efficiency

- Refine capture of process improvement ideas into formal structure that includes agency-wide support for improvements, set frequency for reporting on progress of improvements, and rewards structure for working on improvements
- Explore implementing lean six-sigma methodology into internal processes to improve efficiency (e.g., conduct value streaming of internal reporting activities that do not relate to mandates)

#### Improper Payments/Fraud Prevention

- Pilot and scale initiatives focused on reducing old age, survivor, and disability insurance (OASDI) overpayment (e.g., investing in data analytics software to gain visibility into customers at a higher risk of receiving overpayments)

#### Data Analytics

- Expand data analytics to all internal processes that handle organizational, customer, and/or employee data
- Advance capabilities of existing data analysis to real-time where information is most time pressing, to visual where trends in are more important than the numbers themselves, and to automate reporting where consistent manual reporting exists

#### Data Exchange

- Identify and implement agency-wide changes to improve scalability of data exchanges and use, including:
  - Integrate/combine related database exchanges and provide access to all information (based on access rights) through a single unified enterprise database and analytics platform
  - Develop a standard data naming and metadata convention for entire agency and data exchanges

### Adaptive Culture

#### Change Culture

- Engage employees interested in organizational culture changes through working groups led by transformational leaders
- Increase employee ownership of culture changes through development of measures to define and report on success of changes
- Create incentives for establishing a collaborative environment within components and for use of cross-component knowledge-sharing tools

#### Executive Accountability

- Send communications to employees showcasing leadership buy-in to ideation platforms and the impact of employees whose ideas were funded through to implementation

### Customer-Centric Infrastructure

#### Technology Modernization

- Submit well-researched ideas based on the technology strategy that facilitate large-scale modernization of systems to the IT investment process to improve customer centricity
- Test and build the infrastructure that supports “one view” of the customer through streamlined data sources and a central management (CRM) system that provides customer profile, case history, and other necessary information

#### Cyber Security

- Explore mobile multifactor identification of customers across all service channels (e.g., biometric capabilities)
- Pilot citizen-driven, opt-in services designed to securely validate information internally and externally on demand
- Implement government leading processes enforcing least-privileged access, account monitoring, and account management

#### Physical Infrastructure

- Use information gathered from consolidated customer experience data to inform pilots of changes to office layouts, self-help spaces, and office locations to improve customer experience

# Wave 3 initiatives focus on further advancing “one government” strategies

	Wave 1a FY16	Wave 1b FY17	Wave 2 FY18-22	Wave 3 FY22-25
Continuous Improvement	<ul style="list-style-type: none"> <li>▪ Critical Eight: Accelerate use of data-driven decision-making</li> <li>▪ Data exchange CoP</li> <li>▪ Public-private CoE</li> <li>▪ Workforce analytics</li> <li>▪ Predictive modeling in continuing disability reviews and redeterminations</li> <li>▪ Continuous quality improvement reviews</li> <li>▪ Anti-fraud infrastructure</li> </ul>	<ul style="list-style-type: none"> <li>▪ Assess continuous quality review initiative and develop expansion strategy to process improvements</li> <li>▪ Determine reach of current data exchanges and capabilities of CoP and CoE</li> <li>▪ Evaluate additional internal processes that can benefit from analytics for decisions</li> <li>▪ Establish processes to address improper payment root causes</li> </ul>	<ul style="list-style-type: none"> <li>▪ Formalize capture of and action on process improvement</li> <li>▪ Explore more rigorous forms of creating process efficiencies</li> <li>▪ Identify and address barriers to scaling data exchanges</li> <li>▪ Integrate real-time data analytics capabilities and visualization across all relevant internal processes</li> <li>▪ Use understanding of root causes to reduce OASDI** overpayment to the target level</li> </ul>	<ul style="list-style-type: none"> <li>▪ Expand evaluation and creation of process efficiencies to strategic partner organizations</li> <li>▪ Explore shared view of the customer across government agencies through seamlessly integrated data across all agency partners</li> <li>▪ Identify latest data analytic capabilities and integrate into internal and customer-facing processes</li> </ul>
Adaptive Culture	<ul style="list-style-type: none"> <li>▪ Critical Eight: Establish the enterprise program management office</li> <li>▪ Policy compliance</li> <li>▪ top-down communication enhancements</li> <li>▪ Human capital management</li> <li>▪ Virtual hallway</li> <li>▪ Strategic IT Assessment and Review Board (SITAR)</li> </ul>	<ul style="list-style-type: none"> <li>▪ Expand current methods for communicating change initiatives and engaging employees</li> <li>▪ Develop communications and incentives structure for promoting employee use of the ideation platform for innovative ideas</li> <li>▪ Identify transformational leaders throughout SSA</li> </ul>	<ul style="list-style-type: none"> <li>▪ Promote employees engagement through involvement in working groups</li> <li>▪ Reinforce leadership messaging of support for innovative ideas and provide implementation successes</li> <li>▪ Reward knowledge-sharing and collaboration through performance management and rewards programs</li> </ul>	<ul style="list-style-type: none"> <li>▪ Explore new mediums for communicating with and engaging employees in change initiatives</li> <li>▪ Integrate transformation leaders across strategic partners in SSA culture changes</li> <li>▪ Reflect culture of continuous development and learning in personal development plans</li> </ul>
Customer-Centric Infrastructure	<ul style="list-style-type: none"> <li>▪ Critical Eight: Transform IT investment process</li> <li>▪ Disability case processing system</li> <li>▪ Medicare database enhancements</li> <li>▪ Authentication</li> <li>▪ Footprint reduction</li> </ul>	<ul style="list-style-type: none"> <li>▪ Assess IT infrastructure for modernization, consolidation, and integration points across all systems</li> <li>▪ Expand multifactor identification across all customer online accounts</li> <li>▪ Establish a link between customer insights and technology and physical infrastructure</li> </ul>	<ul style="list-style-type: none"> <li>▪ Research, test, and invest in technology that replaces outdated IT infrastructure and enables one view of customers</li> <li>▪ Expand multifactor identification across all service channels</li> <li>▪ Pilot and implement changes to office layouts and self-help spaces to improve customer experiences</li> </ul>	<ul style="list-style-type: none"> <li>▪ Explore technology investments that jump the technology modernization gap with strategic partners*</li> <li>▪ Implement adaptive smart software to elude cyber attacks</li> <li>▪ Explore adaptations to physical infrastructure that further support partnerships between agencies</li> </ul>

# Wave 3 initiatives come from stakeholder\* input, leading practices, and additional Deloitte recommendations

Initiative	Why we are recommending initiatives
Expand evaluation and creation of process efficiencies to strategic partner organizations	<b>External Research:</b> The Environmental Protection Agency works with other agencies to improve operations and processes by providing toolkits on conducting lean improvement events
Explore shared view of the customer across government agencies through seamlessly integrated data across all agency partners	<b>Deloitte Recommendation:</b> As data quality increases and agencies become more connected through data exchanges, SSA may have the opportunity to participate in infrastructure allowing for common customer views across agencies
Identify latest data analytic capabilities and integrate into internal and customer-facing processes	<b>Deloitte Recommendation:</b> As new ways to analyze and visualize data are created, the products can be evaluated for potential to increase SSA's analytics capabilities and support decision-making across the agency
Explore new mediums for communicating with and engaging employees in change initiatives	<b>Deloitte Recommendation:</b> As technology continues to advance and the way people interact with it changes, mediums through which employees are engaged can be evaluated to expand employee access to participation in change activities
Integrate transformation leaders across strategic partners in SSA culture changes	<b>Deloitte Recommendation:</b> As leaders are held accountable for employee engagement across agencies and partnerships strengthen, there is potential for transformational leaders to lead changes and engage employees across agencies
Reflect culture of continuous development and learning in personal development plans	<b>Deloitte Recommendation:</b> As the organization transforms, development plans can reflect the values of SSA and foster a culture of continuous development
Explore technology investments that jump the technology modernization gap with strategic partners	<b>External Research:</b> The Federal Bureau of Investigations switched from development of a case management system using a waterfall methodology to agile development to improve functionality <b>Stakeholder Input:</b> Indicated SSA's legacy infrastructure causes frustration and overall inefficiencies, especially as it compares to that of other organizations
Implement adaptive smart software to elude cyber attacks	<b>External Research:</b> The Department of State implemented an automated and dynamic scorecard to constantly assess risk across the organization and to constantly updates based on new threats and vulnerabilities to guide actions <b>Deloitte Recommendation:</b> As cyber security threats continue to advance, there will be more risk to customer privacy and SSA can maintain a robust cybersecurity infrastructure to prevent data breaches and cyber security incidents
Explore adaptations to physical infrastructure that further support partnerships between agencies	<b>Stakeholder Input:</b> Indicated the need to adapt in-person service models as service delivery methods evolve

# Detailed descriptions of Wave 3 initiatives

**Key: Strategy**

- Initiative
- Initiative

## Wave 3: FY22-25

### Continuous Improvement

#### Process Efficiency

- Implement and evaluate initiatives that reduce waste in cross-agency processes involving SSA
- Create actionable toolkits on inter-agency continuous improvement best practices from lessons learned

#### Improper Payments/Fraud Prevention

- Use data exchange and analytics in expansion of fraud prevention to include strategic partnerships

#### Data Analytics

- Inventory analytical trends in modeling, automation, visualization, etc. to identify capabilities to invest in and pilot for all processes
- Develop additional automated and predictive analytic capabilities across SSA, focused on customer and employee needs

#### Data Exchange

- Participate in developing cross-government, unified data standards for agencies to use
- Design platform to seamlessly integrate data received into SSA employee-facing software in order to automate workflows and inform decision-making where possible
- Establish formal cross-government data-sharing infrastructure with agencies using similar customer data that enable one view of customer records (e.g., same customer record view across the Veterans Administration, Department of Defense, Internal Revenue Service, and SSA)

### Adaptive Culture

#### Change Culture

- Adapt performance management and personal development plans to include foundations of culture (e.g., continuous personal and professional development, knowledge-sharing across components and expertise, continuous improvement efforts)
- Identify latest communication medium and employee usage (e.g., 100% of employees in a specific group currently have iPhones, so iMessage is a potential new medium for communications to reach this group)
- Pilot and scale using new mediums to engage employee groups in cultural change

#### Executive Accountability

- Identify transformational leaders across commercial and government partners who currently work with SSA
- Integrate transformational leaders into cultural changes impacting data exchange, shared physical infrastructure, shared customer experiences across agencies, and other areas of interaction between SSA and partner organizations

### Customer-Centric Infrastructure

#### Technology Modernization

- Identify breakthrough technologies that support employee collaboration, customer service, and organization agility
- Scale technology modernization

#### Cyber Security

- Implement smart software and infrastructure designed to constantly change and elude attacker's efforts against endpoints
- Deploy advanced, automated, intelligent customer identity verification systems for SSA services

#### Physical Infrastructure

- Gather insights from advanced employee and customer understanding to make physical infrastructure adaptable to meet their current and future needs
- Further integrate physical locations with additional partners (e.g., expansion of Internal Revenue Service and SSA shared spaces)

# These waves combined create the Vision Roadmap for innovative organization

	Wave 1a FY16	Wave 1b FY17	Wave 2 FY18-22	Wave 3 FY22-25
Continuous Improvement	<ul style="list-style-type: none"> <li>Critical Eight: Accelerate use of data-driven decision-making</li> <li>Data exchange CoP</li> <li>Public-private CoE</li> <li>Workforce analytics</li> <li>Predictive modeling in continuing disability reviews and redeterminations</li> <li>Continuous quality improvement reviews</li> <li>Anti-fraud infrastructure</li> <li>Virtual lifetime electronic record</li> </ul>	<ul style="list-style-type: none"> <li>Assess continuous quality review initiative and develop expansion strategy to process improvements</li> <li>Determine reach of current data exchanges and capabilities of CoP and CoE</li> <li>Evaluate additional internal processes that can benefit from analytics for decisions</li> <li>Establish processes to address improper payment root causes</li> </ul>	<ul style="list-style-type: none"> <li>Formalize capture of and action on process improvement</li> <li>Explore more rigorous forms of creating process efficiencies</li> <li>Identify and address barriers to scaling data exchanges</li> <li>Integrate real-time data analytics capabilities and visualization across all relevant internal processes</li> <li>Use understanding of root causes to reduce OASDI** overpayment to the target level</li> </ul>	<ul style="list-style-type: none"> <li>Expand evaluation and creation of process efficiencies to strategic partner organizations</li> <li>Explore shared view of the customer across government agencies through seamlessly integrated data across all agency partners</li> <li>Identify latest data analytic capabilities and integrate into internal and customer-facing processes</li> </ul>
Adaptive Culture	<ul style="list-style-type: none"> <li>Critical Eight: Establish the enterprise program management office</li> <li>Policy compliance</li> <li>top-down communication enhancements</li> <li>Human capital management</li> <li>Virtual hallway</li> <li>Strategic IT Investment Process</li> </ul>	<ul style="list-style-type: none"> <li>Expand current methods for communicating change initiatives and engaging employees</li> <li>Develop communications and incentives structure for promoting employee use of the ideation platform for innovative ideas</li> <li>Identify transformational leaders throughout SSA</li> </ul>	<ul style="list-style-type: none"> <li>Promote employees engagement through involvement in working groups</li> <li>Reinforce leadership messaging of support for innovative ideas and provide implementation successes</li> <li>Reward knowledge-sharing and collaboration through performance management and rewards programs</li> </ul>	<ul style="list-style-type: none"> <li>Explore new mediums for communicating with and engaging employees in change initiatives</li> <li>Integrate transformation leaders across strategic partners in SSA culture changes</li> <li>Reflect culture of continuous development and learning in personal development plans</li> </ul>
Customer-Centric Infrastructure	<ul style="list-style-type: none"> <li>Critical Eight: Transform IT investment process</li> <li>Disability case processing system</li> <li>Medicare database enhancements</li> <li>Authentication</li> <li>Footprint reduction</li> </ul>	<ul style="list-style-type: none"> <li>Assess IT infrastructure for modernization, consolidation, and integration points across all systems</li> <li>Expand multifactor identification across all customer online accounts</li> <li>Establish a link between customer insights and technology and physical infrastructure</li> </ul>	<ul style="list-style-type: none"> <li>Research, test, and invest in technology that replaces outdated IT infrastructure and enables one view of customers</li> <li>Expand multifactor identification across all service channels</li> <li>Pilot and implement changes to office layouts and self-help spaces to improve customer experiences</li> </ul>	<ul style="list-style-type: none"> <li>Explore technology investments that jump the technology modernization gap with strategic partners*</li> <li>Implement adaptive smart software to elude cyber attacks</li> <li>Explore adaptations to physical infrastructure that further support partnerships between agencies</li> </ul>



# Section Two: Vision Roadmap Execution Strategy



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## Vision Roadmap Execution Strategy Overview

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This section provides an overview of the **next steps** for prioritizing vision objectives and transformational initiatives, and planning, implementing, and monitoring/tracking those **transformational initiatives**.

The distinction of a *transformational* initiative is intentional – **these initiatives are those specifically aimed to achieve Vision 2025 goals across the agency**. As such, we recommend they be managed and tracked separately from the rest of SSA's initiatives.

We recommend following nine steps to set up the structure and accountability for managing SSA's transformational initiatives. These steps involve **key roles and elements for agency-wide strategic planning**, and help SSA establish the fundamental principles necessary for transformation:

- **Clear decision-making**
- **Strong accountability**
- **Quality approach to performance evaluation**



# SSA continues to make significant progress in realizing the Vision

Over the past year, SSA has used the following process to develop a strategy for realizing Vision 2025. The last step in this process is to execute against this strategy and take action.



## What are our goals and aspirations?

- What are your **primary goals** as an agency?
- What is your **desired impact** on your customers, employees, and organization?
- How do your **goals support the desired impact** you want to have?



## Where will we focus?

- Which areas are most impactful** in helping meet those goals?
- On **which customer and employee groups or organizational aspects** can you have the greatest impact?



## How will we succeed?

- What are the gaps in achieving your focus areas?
- What role** should SSA leadership play? OCSO? Regions? Field Offices? Other key stakeholders?
- How will you change culture and **incentivize behavior**?



## What capabilities will we need?

- Who** must do **what**?
- What **existing initiatives** do you have to effectively support your goals?
- What **initiatives should you develop**?

## Next Steps

## What are our priority next steps?

- Based on your priorities, objectives, and strategies, what should your **priority initiatives** be?
- Which initiatives will have the **highest impact** in the short-term?
- In **what sequence** can these priority initiatives be accomplished?

# We offer the following keys to successful governance

Realizing Vision 2025 requires a strong accountability structure for transformation across the agency. The following are leading practices for accountability structures and transformation:

- **Accountability needs to sit at all levels of the agency, from the top, down to initiative owners**
- **Accountability and responsibility** for transformational initiative management and governance **needs to be clearly defined upfront**. All stakeholders involved must be fully aware of the responsibilities and expectations of their role
- **Data-driven reviews** must provide leaders with the critical information they need to determine status and make decisions. **Any difficulties in capturing and providing information in a timely manner may delay the decision-making process**
- **Integrating risk management** throughout the process will help SSA identify potential risks and develop corresponding mitigation strategies

## Lessons Learned from other Organizations

As part of its ongoing effort to manage and shape the veterans' experience, the **Veteran's Affairs** (VA) relies on agency leaders to be transformation champions. VA holds these champions accountable by using data to track key performance measures and to identify common transformation issues. This has resulted in increased transparency of the transformation progress and insight into transformation issues which inform decision-making.

### *Key Takeaways for SSA:*

- Leadership accountability sits at the heart of change
- Data-driven decision-making and collective leadership responsibility to act lead to meaningful progress

In 2010, **USAA** created a new position to drive improvements to customer experience across the organization: the Executive Vice President of Member Experience. This position reports directly to the CEO and leads all operations relating to customer experience (marketing, sales, channel management, and service functions). The result of this reorganization was not only an increase in customer experience index scores, but also an organizational culture shift towards customer-centricity.

### *Key Takeaways for SSA:*

- Instituting a formal leadership role for driving a specific organizational change creates executive accountability for achieving that change (e.g., improved customer experiences)

# We identified the key next steps to realize the Vision Roadmap

Executing the Vision Roadmap includes taking steps in three key areas: focus and prioritize goals and transformational initiatives; plan for and integrate the initiatives into current operations; and continuously monitor and communicate on initiative progress. SSA has already made headway in these steps through the Critical Eight.

	Area	Key Element	Steps
Within 2 Months	<b>Focus and Prioritize</b>	<b>Accountability Structure and Performance Measures</b>	<ul style="list-style-type: none"> <li>Develop an accountability structure</li> <li>Validate the Vision Roadmap outcomes</li> <li>Develop transformational initiative performance measures</li> </ul>
		<b>Prioritized Vision Objectives and Transformational Initiatives</b>	<ul style="list-style-type: none"> <li>Prioritize the Vision objectives and the corresponding transformational initiatives for the current wave</li> </ul>
Within 6 Months	<b>Plan and Budget</b>	<b>Transformational Initiative Planning</b>	<ul style="list-style-type: none"> <li>Assign owners to prioritize and sequence transformational initiatives and have them develop transformational initiative plans</li> <li>Develop an integrated master schedule for implementation</li> </ul>
		<b>Budget for Transformational Initiatives</b>	<ul style="list-style-type: none"> <li>Submit funding request for transformational initiatives (Note: requires a two-year lead time)</li> </ul>
Ongoing	<b>Monitor and Communicate</b>	<b>Continuous Evaluation and Reporting</b>	<ul style="list-style-type: none"> <li>Develop an executive dashboard to monitor and evaluate transformational initiatives to understand progress towards milestones and outcomes</li> <li>Report on the progress through status reports/ meetings</li> </ul>
		<b>Data-Driven Reviews</b>	<ul style="list-style-type: none"> <li>Conduct formal, quarterly reviews of transformational initiative progress</li> </ul>
		<b>Communications</b>	<ul style="list-style-type: none"> <li>Provide ongoing updates and briefings to agency internal and external stakeholders to show progress, build trust, and develop visibility into transformational initiatives</li> </ul>

# Step One: Identify and assign key roles and responsibilities

SSA must first establish clear roles and responsibilities to hold SSA leaders accountable for the execution of the Vision Roadmap. In finalizing this accountability structure, SSA should determine how existing structures (e.g., EPMO and ITIP) can be leveraged to manage the Vision 2025 transformational initiatives.

Key Role	Summary of Responsibilities	Proposed SSA Alignment
<b>Leadership Role</b>	<ul style="list-style-type: none"> <li>Provides direction on key issues relating to the agency</li> <li>Approves budget for transformational initiatives</li> <li>Leads quarterly data-driven initiative progress review meetings</li> </ul>	(A)COSS
<b>Transformation Champion Role</b>	<ul style="list-style-type: none"> <li>Responsible for agency transformation (Commissioner-appointed)</li> <li>Chairs the Transformation Leadership Committee</li> <li>Presents leadership with progress reports and action plans</li> </ul>	DC-level representative (e.g., Chief Strategic Officer)
<b>Transformation Leadership Committee</b>	<ul style="list-style-type: none"> <li>Decides on Vision objectives and transformational initiative prioritization and sequencing</li> <li>Participates in formal quarterly data-driven initiative progress reviews</li> </ul>	DCs representing all components
<b>Consultative Group Role</b>	<ul style="list-style-type: none"> <li>Provides input on transformational initiatives based on the knowledge, skills, and experience they bring from respective components</li> <li>Serves as a sounding board for the Transformational Leadership Committee, including preparing for and following up on progress reviews</li> </ul>	Champions of Change (i.e., EVC)
<b>Convener and Coordinator Role</b>	<ul style="list-style-type: none"> <li>Facilitates collaboration across the organization to make strategic decisions</li> <li>Gathers and analyzes data to compile progress measures on transformational initiatives for data-driven review process</li> <li>Provides information for, and facilitates decisions on, prioritization discussions</li> </ul>	OCSO
<b>Transformational Initiative Owner Role</b>	<ul style="list-style-type: none"> <li>Manages and implements all aspects of assigned initiatives</li> <li>Reports to Convener and Coordinator on measures for assigned initiatives</li> </ul>	Initiative Owners

## Step Two: Validate the Vision outcomes with key SSA leadership groups

The current Vision Roadmap is informed by industry best practices and customized based on SSA employee and external constituent feedback. SSA should now validate Roadmap outcomes with SSA leadership

### Step A: Confirm the current state gaps to achieving Vision 2025 goals

**Recommended approach:** Conduct three (1 per Vision priority) multi-hour working sessions with component representatives to discuss and validate the following questions:

- Do we have the right outcomes for our Vision 2025 objectives? (*Reference: Vision Objective Outcomes*)
- Does the current initiative analysis accurately represent all current initiatives that can help us meet our objectives? If not, what additional current initiatives contribute to these goals? (*Reference: current gap analysis in Vision Roadmap*)
- Are we addressing all the capability gaps that will prevent us from meeting our objectives? (*Reference: Vision Roadmap details*)



**Desired outcome: Together, these Vision 2025 outcomes get us to where we want to be in 2025**

#### Session Considerations

- These working sessions will only be successful with the right participants to go through each priority.
- We recommend a similar participant group to the goal-setting workshop on 7/16/2015 (mostly **GS-15's**, **ADC** participation), with components most involved in each priority providing more representation.
- Each session should also have a **DC champion**, and all **ADCs** most associated with the priority should be invited to participate.

### Step B: Socialize and validate the Vision 2025 outcomes with ACOSS and Senior Staff

**Recommended approach:** Brief SSA leadership on results of the three working sessions, clearly articulating the inputs and steps taken to develop the Vision objectives and outcomes:

- External research, stakeholder feedback, current initiative analysis, and working Sessions to finalize and confirm the objectives and outcomes in each priority



**Desired outcome: SSA leadership endorses Vision 2025 objectives and outcomes**

#### By the time the Administration changes...

- SSA needs to be equipped with a plan of action to achieve Vision 2025, and the agility to shape and message the strategy based on new leadership's priorities (e.g., conduct scenario planning for potential nominees)
- SSA should be able to demonstrate meaningful progress towards meeting the Vision objectives

## Step Three: Define metrics to track progress towards goals and outcomes

Once the Roadmap is validated, SSA should develop specific measures for the Vision goals and objectives. These measures should be used for internal (e.g., ongoing initiative monitoring and SOR) and where appropriate, external (e.g., Congressional reporting and Agency Priority Goals) progress reporting



### Characteristics of an Effective Metric

**Good metrics demonstrate impact, support decision-making, and are feasible to collect:**

- **Demonstrate Impact**
  - Links organizational activities and outcomes to clearly demonstrate impact
- **Support decision-making**
  - Data is reliable and available at regular intervals
  - There is a baseline and/or historic data which allows a deeper understanding of trends and drivers of performance
  - Data can be rolled up to see overall picture
- **Feasible to Collect**
  - Data is verifiable; data collection and analysis is not costly and is automated where possible



### Steps to Developing Metrics

**Metrics should be logically linked to the Vision and measure collective progress towards achieving the Vision goals.**

The following series of questions can be used to guide the development of metrics at any level of the Roadmap (priority goals, Vision objectives, and initiatives):

- ✓ Are the **inputs** into a program tracked?
- ✓ Have the specific **activities** of a program (using these inputs) been defined?
- ✓ Are the possible **direct outcomes** of an activity identified and are they measured?
- ✓ Has the **desired impact** of the program been defined?
- ✓ Does the **metric** serve its intended purpose?

#### SSA Next Steps

- Evaluate existing metrics
- Validate those measures with the objectives and strategies
- Build metrics as needed for objectives and strategies (*note: can be done in parallel with Steps 2 and 4*)

## Step Four: Validate prioritization criteria

Prioritization scoring criteria allows SSA to rank objectives, strategies, and initiatives based on different factors. We provided a set of scoring criteria in the Vision 2025 Level of Effort Assessment\*, which ranks impact, complexity, and cost. SSA will need to confirm which scoring criteria will be used before going forward.

### Step A: Validate Prioritization Criteria

#### Proposed Scoring Criteria

##### Impact:

- **Customer:** Measures the direct impact on the customer experience
- **Employee:** Measures the direct impact on SSA's workforce
- **Cross-Component:** Measures the reach of the initiative across the organization
  - (3 = All HQ & field; 2 = multiple, but not all components; 1 = only one component)
- **Ecosystem:** Measures the direct impact to entities other than SSA

##### Risk Analysis:

- **Execution Risk:** Measures the complexity of implementing the initiative
- **Business Risk:** Measures the risk to the organization of attempting to implement the initiative and failing to do so

##### Cost Impact:

- **Investment Costs:** Measures the costs associated with initial initiative set-up and implementation
  - (3 = can fall into current budget; 2 = requires minimal additional investment; 1 = requires significant additional investment)
- **Recurring Costs:** Measures the recurring costs associated with maintaining the initiative
  - (3 = can fall into current budget; 2 = requires minimal additional investment; 1 = requires significant additional investment)





# Step Four (cont'd): Prioritize Vision objectives, strategies, and initiatives

SSA should prioritize Vision objectives for each fiscal year and then prioritize strategies in the context of the Vision objectives to help the Transformation Leadership Committee determine which initiatives to include for each budget cycle.

## Step B: Prioritize Objectives and Initiatives

1. Determine which **Vision Objectives** you want to prioritize for the current cycle
2. Apply **scoring criteria** to the transformational initiatives within that objective for the current wave (e.g., Employee Development Wave 1a (FY16-FY17) initiatives)
3. Use **visualization tool** to better analyze scoring results for each of the initiatives within each of the prioritized Vision objectives
4. Based on results, **determine which transformational initiatives will be prioritized for the fiscal year**

### Prioritization Assumptions and Considerations

- SSA should aim to pursue and successfully implement all transformational initiatives within the specified wave
- Prioritization allows SSA to sequence initiative implementation in a given wave and, more importantly, allows SSA to focus on a subset, not all, of its goals, objectives, and transformational initiatives if it faces budget and/or resource constraints or political pressures
- As SSA prioritizes initiatives, it must consider which other initiatives, prioritized or not, are necessary to achieve those initiatives and prioritize those as well

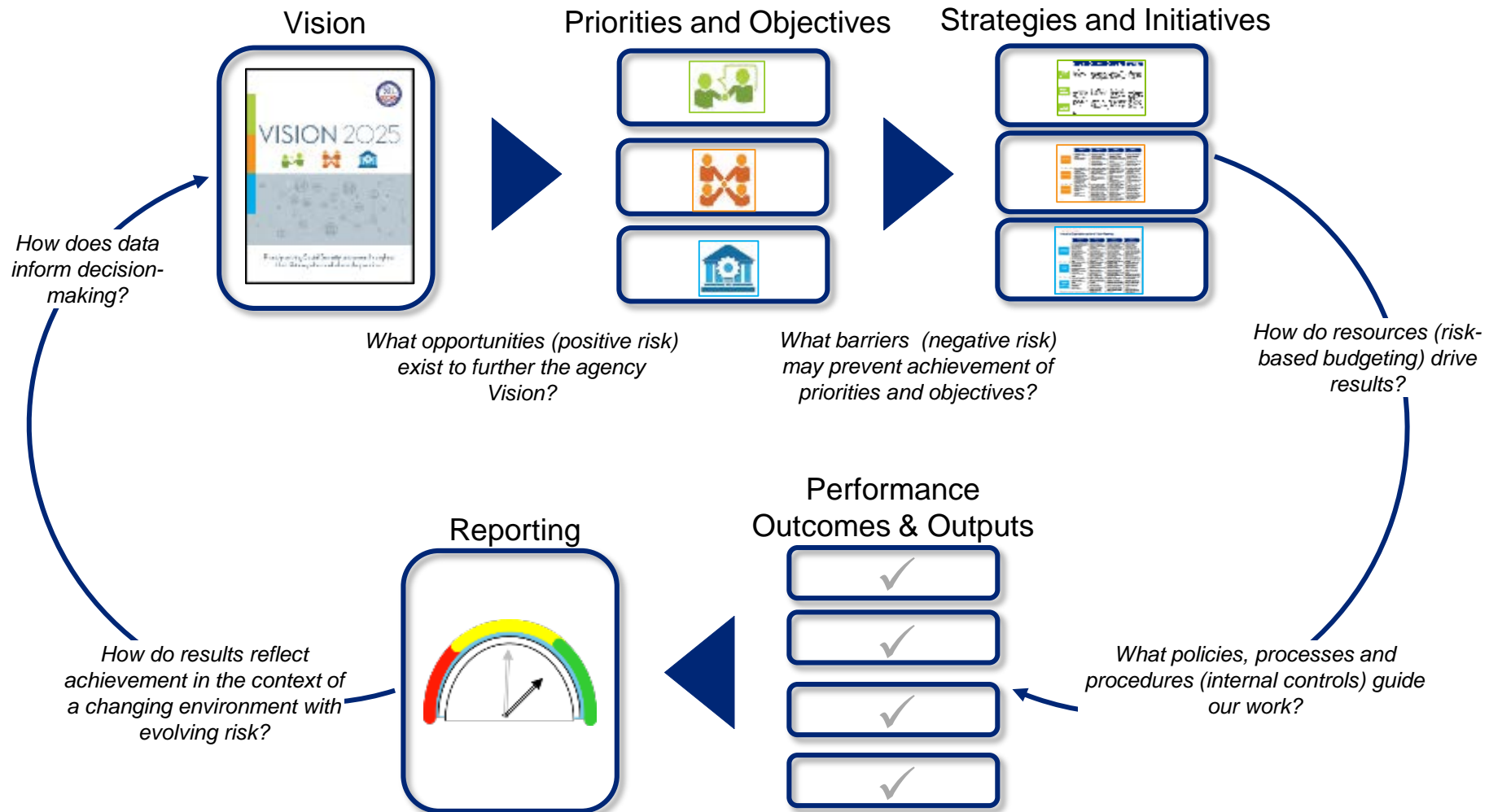
### Prioritization Process





# Step Four (cont'd): Identify the risks of not meeting the Vision and understand the risks that could impact its realization

SSA should consider the following questions to manage risk throughout Vision implementation.



# Step Five: Develop initiative plans

Once prioritized, the Transformation Champion role should assign an owner(s) to plan the implementation of the initiative, including the development of an initiative plan that justifies a budget request.

## Overview of Initiative Plan Content\*

- What is the initiative?
- Who owns it?
- What are the estimated start and end dates?

- Who are the key implementation team members and what are they responsible for?

- Which other initiatives is this initiative dependent on?

<b>Initiative Name</b>		<b>Initiative Description</b>	
<b>Vision 2025 Strategy</b>			
<b>Owner</b>		<b>Initiative Measures</b>	
<b>Start Date</b>			
<b>End Date</b>			
<b>Team Members</b>	<b>Team Roles</b>	<b>Resources Needed</b>	
<b>Overview of Implementation Timeline and Key Milestones</b>			
<b>Dependencies</b>			

- What is the initiative's objective?
- What is the initiative's goal?

- How will the initiative be measured?
- What metrics will be used to track progress?

- What are the estimated initiative costs?
- What are the projected internal and external resources needed?

- What are the initiative's main activities?
- What are key milestones and estimated timing for reaching them?

# Step Five (cont'd): Consolidate initiatives into an integrated master schedule

Transformational initiatives will be increasingly multidimensional and complex. As such, they should not be managed as discrete projects, rather at an enterprise-wide, interrelated level to track collective progress towards achieving outcomes.

## Overview

An **Integrated Master Schedule** is a consolidated view of all ongoing initiatives' schedules, key dependencies, and milestones.

## Who?

The **Convener** role manages the budget, Transformational Initiative Integrated Master Schedule (IMS), and reporting of all transformational initiatives across the agency.

## What?

Once the **Initiative Owners** finalize their schedules, the Convener creates an IMS. The IMS incorporates key milestones, activities, and dependencies from each initiative-schedule. The Convener then sets a baseline to allow for measurement of actual progress against planned progress.

## How?

The primary tool required is **Microsoft Project**.

## Approach

1. Determine which schedules and associated interdependent stakeholders need to be coordinated through the IMS
2. Identify the information flows and feedback mechanisms needed to update the schedule and projections
3. Assign owners of the data that feeds into the IMS
4. Define the IMS major milestones and activities
5. Use IMS to:
  - Provide insight and understanding of risks across initiatives during implementation
  - Inform schedule reviews and focus teams on critical activities
  - Identify changes and potential issues to prompt appropriate action

**Key Dependency: Timely and accurate information from the initiative owners will be necessary for the IMS to provide accurate progress of the transformational initiatives**

## Step Six: Monitor, evaluate, and report on progress toward outcomes

Ongoing data collection and analysis, status reports, and a dashboard should be used to track progress towards reaching the Vision objective outcomes. These reporting capabilities allow leaders to react quickly to initiatives that may be off-track. You should integrate risk management discussions throughout these reviews\*.

### Step A: Define method for capturing data

Using the metrics that you identified in Step Two, determine the procedures for data collection and reporting that can show whether initiatives are on or off-track.

- What data should be collected to populate each measure?
- What is the best source for this data?
- Can this data be automatically collected or is a level of manual intervention necessary?
- Who is responsible for collecting the data?
- How often should the data be collected?

### Step B: Develop monitoring dashboard

Create a dashboard to provide the insight and information needed to manage transformational initiatives holistically and view progress on achieving goals.

#### Dashboard Benefits:

- Uses performance metrics to monitor and analyze initiative performance
- Displays trends on initiative progress in an interactive and user-friendly fashion
- Illustrates if goals are on or off-track
- Gauges overall likelihood of achieving goal

### Step C: Utilize Dashboard to build initiative reporting capabilities

Develop a status reporting cycle to summarize and communicate initiative status to all key strategic planning roles (see *Appendix E*) and external constituents and report on agency's overall progress towards reaching Vision 2025 goals.

#### Initiative Team Huddles

- Share brief updates on initiative status
- Discuss initiative activities for the week
- Identify any dependencies or risks

#### Monthly Status Report/ Initiative Owner Meeting

- Report on initiative measures and progress since last meetings
- Review dashboard and report on “story behind the numbers”
- Determine actions to get back on track, if applicable
- Identify and discuss any cross-initiative dependencies and/or risks

#### External Progress Report

- Communicate strategy for achieving goal
- Illustrate actual vs. predicted performance-to-date on goal
- Assess status and impact of past and upcoming milestones

98 Note: see GAO report “Managing for Results: Agencies Report Positive Effects of Data-Driven Reviews on Performance but Some Should Strengthen Practices” for more information on the impact of data-driven reviews.

\* See Appendix E for more information on integrating risk management into monitoring and evaluation

# Step Seven: Conduct formal strategic reviews quarterly and annually

SSA's Strategic Objective Review (SOR), the agency's formal review process, should allow SSA leadership to monitor and evaluate progress against long-term outcomes and, based on performance results, refine the strategy as needed.

## Strategic Review Cycles

### Quarterly

#### *Who should be involved?*

- Transformation Leadership Committee, Convener and Coordinator Role, and Initiative Owners

#### *What should be done?*

- Conduct review of performance on key measures for strategic goals
- Discuss strengths, development areas, risks, and opportunities
- Determine any necessary action based on performance

### Annually

#### *Who should be involved?*

- Leadership Role, Transformation Leadership Committee, and Convener and Coordinator Role

#### *What should be done?*

- Conduct holistic review of strategy in light of shifting internal and external trends
- Adjust strategy/development of annual strategy
- Celebrate strategic accomplishments of past year
- Communicate strategic priorities and key initiatives for coming year

## Strategic Review Activities

### Before

- 6 weeks:** Initiative Owners identify information required to prepare for strategy review
- 6-3 weeks:** Initiative Owners collect information from staff, including performance measure data linked to key initiatives and staff input on discussion topics
- 3-2 weeks:** Initiative Owners aggregate information and identify key trends and discussion points for management
- 1 week:** Initiative Owners send summary of performance data, key initiatives, and key trends to Conveners for distribution and advance review

### During

- Identify key trends in performance on each initiative, including organization capacity
- Refine initiative approach to maintain strong performance and address lagging performance
- Review overall strategy and confirm relevance
- Gain consensus on key decisions

### After

- Document key decisions and share with staff by email and weekly huddle
- Modify planning for all-staff retreat as applicable

# Step Eight: Adjust approach as necessary in response to review

During monthly meetings and quarterly and annual reviews, SSA will need to make decisions and take action based on initiative status and progress results.



## Initiative On or Ahead of Track

If transformational initiatives are on or ahead of track, there are certain actions that you can take to learn from the success and reevaluate your ambition level.

- **Success Factors:** Gain a deeper understanding of *what* is working well, and *why* it is working in this context
  - Identify what is driving progress
  - Assess whether there are cultural/programmatic factors associated with drivers that are unique to program
- **Scalability:** Evaluate if successful aspects of the program can be scaled to other programs
- **Further Enhancement:** Conduct an external scan to see if best practices from similar programs can be adopted to further improve progress
- **Ambition Level:** Assess whether more ambitious targets should be adopted, or if program should be expanded










## Initiative Off Track

If transformational initiatives are off track, you may need to determine the factors causing the delay and develop strategies to correct it. In some instances, it may be better to adopt a “fail fast” approach and discontinue the initiative.

- **Delay Drivers:** Based on collected data, identify the key drivers of the problem
- **Strategy Review:** Assess whether the problem can be corrected through operational adjustments, or if strategy needs to be updated
- **Revised Approach:** If strategy needs to be updated, consider the following:
  - Have there been internal/external shifts that affect effectiveness of the programs?
  - Have capabilities of SSA shifted?

## Step Nine: Engage and communicate with employees



















SSA can gain support for Vision 2025 across SSA through informative progress updates to employees that build trust in the direction of the agency and provide opportunities for employees to actively contribute to realizing Vision 2025.

Vehicle	Description
<b>IdeaScale</b> 	Bring together employees to develop tactical operational solutions for strategic initiatives and facilitate two-way communication between current initiative owners and employees who have feedback pertaining to each initiative.
<b>Initiative Spotlight</b> 	Work with strategic initiative owners to develop summary reports and/or videos updates that spotlight a current initiative and include: overview of initiative, purpose of the initiative, initiative owners, key contributions to the initiative from SSA employees, status update, and future activities.
<b>Executive Talking Points</b> 	Provide SSA leadership with Vision 2025 talking points to ensure accurate and consistent messaging to internal and external audiences.
<b>Opt-in Vision 2025 Updates</b> 	Allow employees to opt-in for Vision 2025 updates, including: additional information on initiative status; notes from SSA leaders on their role in Vision 2025; messages from regional leadership and field employees on “what Vision 2025 means to them.”
<b>Vision 2025 Video Series</b> 	Create short videos featuring SSA leaders discussing the importance of Vision 2025, how employees have and will continue to contribute to the Vision, and key elements of the path forward.
<b>Town Halls</b> 	Conduct quarterly virtual meetings with all Regional Leadership teams to: provide Vision 2025 status updates and an overview of employee feedback; discuss their role in realizing Vision 2025; provide materials that can be directly shared with field employees; and recognize employees who have been particularly innovative and supportive.
<b>Annual Vision 2025 Award</b> 	Institute an annual Vision 2025 award presented by SSA leadership to an employee nominated by Regional Leadership teams for contributing directly to realizing the Vision.

## Step Nine (cont'd): Plan communications schedule

Communications need to be planned and scheduled throughout the fiscal year, with each communication vehicle having an assigned point of contact to lead the communications development and execution.

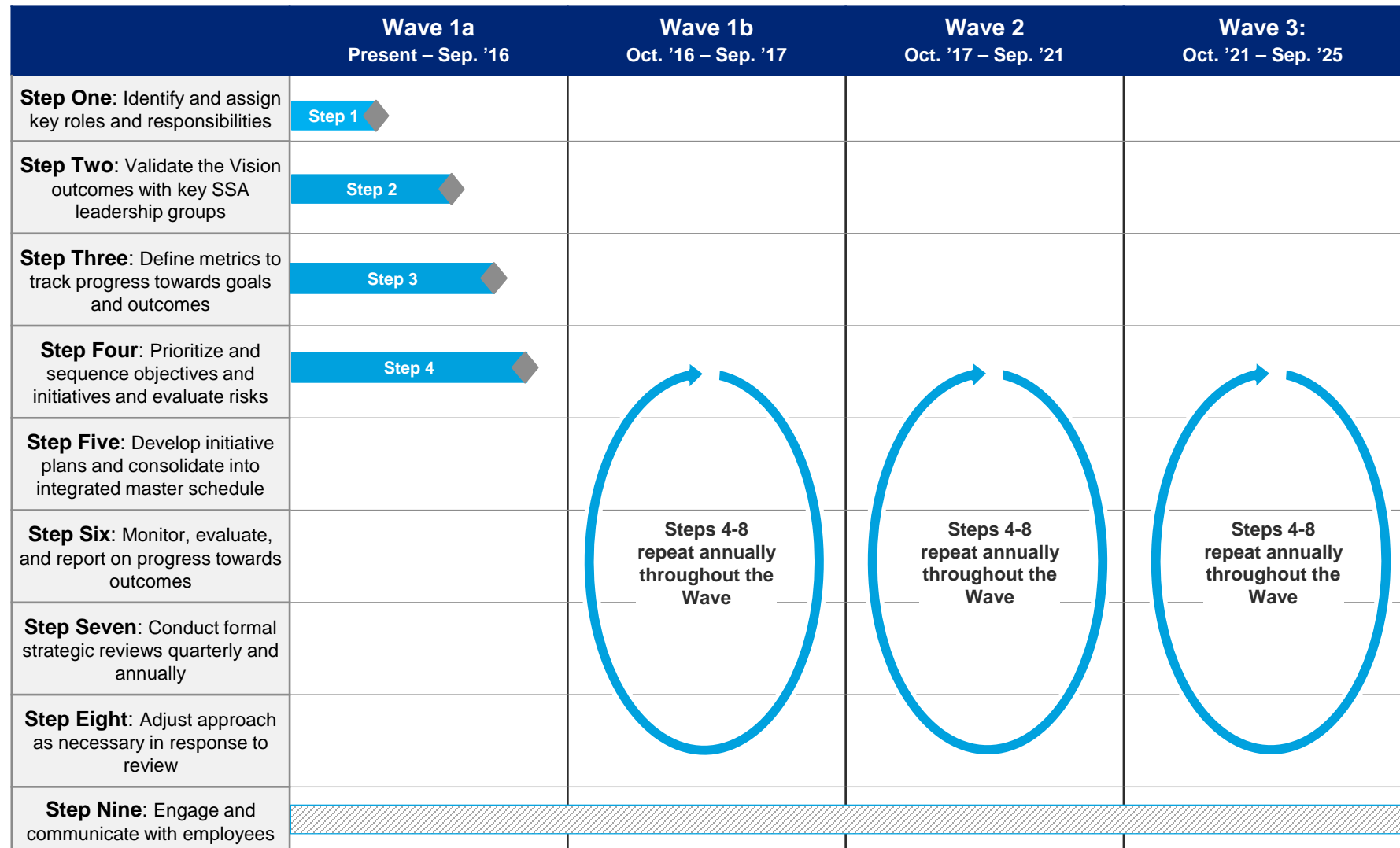
**Sample Vision 2025 Communications Timeline\***

Communication Vehicle	Q1	Q2	Q3	Q4
IdeaScale				
Initiative Spotlight				
Executive Talking Points				
Opt-in Vision 2025 Updates				
Vision 2025 Video Series				
Town Halls				
Annual Vision 2025 Award				



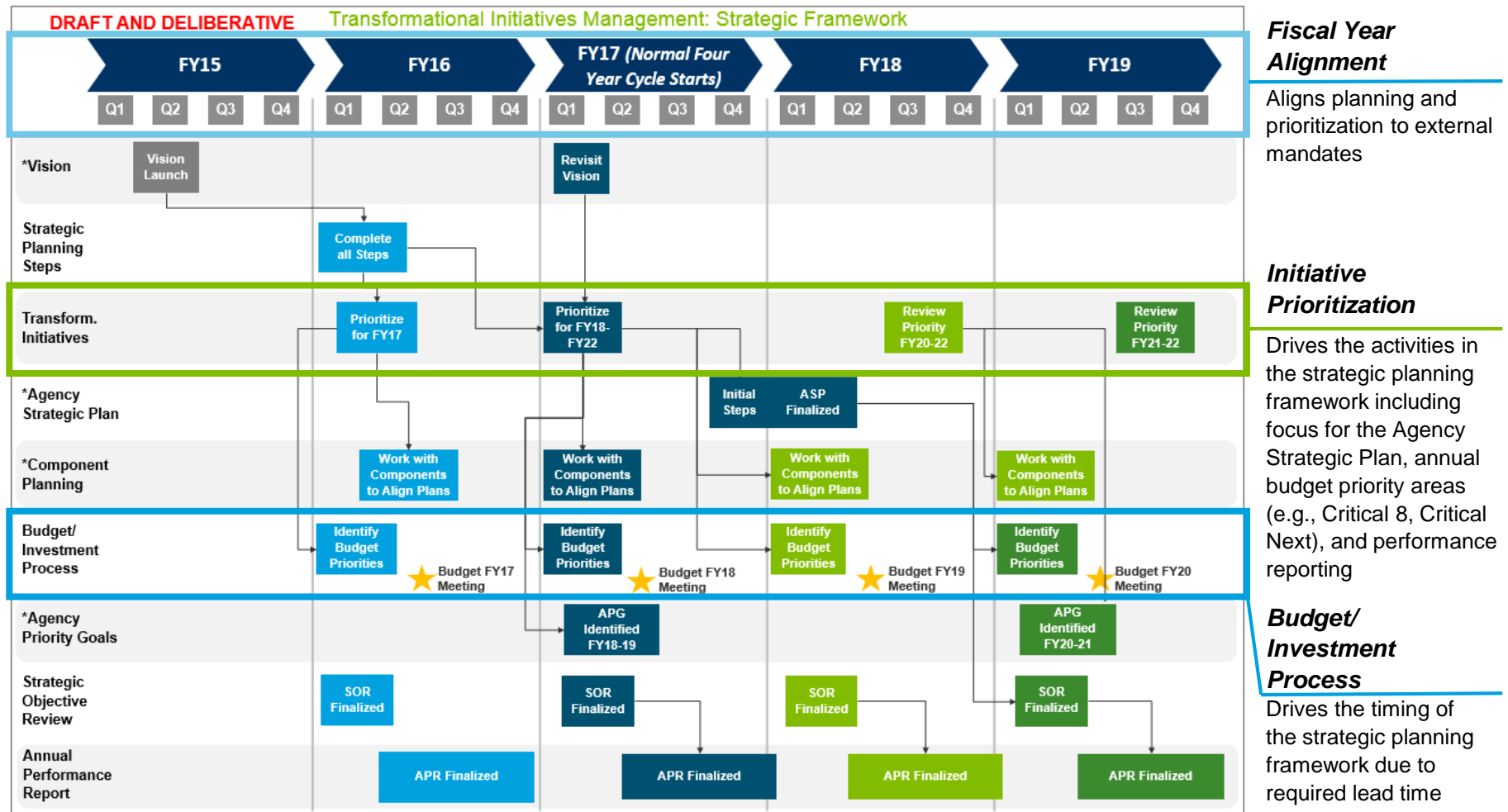
# These nine key steps will help SSA establish a governance structure

There are nine key steps that will help SSA establish a governance structure centered around clear decision-making, strong accountability, a quality performance evaluation, and risk management. Steps 1-4 set the foundation in Wave 1a; Steps 4-8 are an annual repeated cycle in Waves 1b-3; and Step 9 is ongoing.



# Management of these transformational initiatives needs to fall into a larger agency strategic framework that supports external mandates

The framework includes mandated strategic documents with specified timeframes, used to prioritize strategic conversations across the agency. Embedding Vision 2025 into current agency processes will help keep Vision 2025 at the forefront of SSA's strategic planning. A full size of the strategic framework can be found in Appendix E.



# Keys to success

Vision 2025 is more than a document, it paves the way for transformation. SSA has taken significant steps towards realizing Vision 2025 through identified long-term goals and development of a Roadmap with transformational initiatives to achieve those goals. SSA's leadership team will need to keep the following in mind as it drives forward:

**1****Build Vision 2025 Engagement Across the Agency**

Visible endorsement of Vision 2025 by SSA leadership will empower management and employees to make Vision 2025 a success. Overall employee engagement in Vision planning and execution will foster each individual employee's connection to the Vision and its goals, and build agency-wide commitment to transformation.

**2****Fully Integrate with the Critical Next**

Vision 2025 should serve as the primary strategic document that informs all Critical Next discussions leading up to the meeting in March 2016.

**3****Prepare for the Next Administration**

By 2017, Vision 2025 should be embedded in the agency such that it remains a top agency focus during the upcoming administration change. Vision 2025 will not change, though how it is presented and shaped will need to be nimble based on the new administration and their transition team's priorities.

**4****Develop a "Strategic Hub" within SSA**

OCSO should be the agency authority for strategic planning and fulfill various needs, such as: serve as facilitator for component strategic planning conversations; provide initiative owners with ongoing employee feedback; and identify and bridge any gaps in strategy planning.

**5****Seek Employee Feedback and Continuously Report Progress**

Quantitative and qualitative input from groups and individuals directly impacted by SSA policies and programs will continue to be a critical part of strategic planning efforts and will be invaluable as SSA prioritizes goals and initiatives.

# Section Three: Call to Action



# Social, technology, and environment macro factors that will likely change how SSA operates over the next 5-10 years stress the need to take action



## Social

- **Crowdsourcing:** Crowdsourcing methodology elicits perspectives and insights from a wide range of individuals
- **Urbanization:** 2.5 billion people from the developing world are estimated to live in urban areas by 2050
- **Rise of the Global Citizen:** Globalization, improved education, and talent demands will continue to drive migration across the globe
- **Lifelong Skills Development:** Iterative learning and training is required well past traditional education to retain professional relevance
- **Online Education:** Over 250 million people have signed up for Massive Open Online Courses (MOOCs) in the last 3 years
- **Wealth Inequality:** The gap in wealth between the richest and poorest Americans continues to increase disparity
- **DIY Movement:** As technology and other tools become more readily available, the DIY movement will expand to the public sector
- **Aging Populations:** By 2020, 20 percent of the developed world's population is estimated to be aged 65 or above
- **Socially Conscious Consumer:** Increasingly, consumers believe they have a responsibility to the environment and society
- **Human-Centered Design:** Federal agencies are increasingly recognizing the need for a customer-centric approach to their work



## Technology

- **Adoption of Internet of Things:** The ecosystem of electronic devices connected to the internet that can be accessed remotely continues to grow
- **Automation:** With improvements in tech and robotics, both physical and knowledge-based tasks will increasingly be automated
- **Augmented Reality:** 3D technology is expected to continue to evolve, with applications beyond entertainment
- **Cloud Accessibility:** As cloud computing becomes cheaper, organizations are increasingly foregoing localized networks in favor of renting cloud space
- **Blockchain Systems:** The technology behind Bitcoin creates a shared, trusted, decentralized, and public ledger to automate financial transactions
- **API Economy:** Application Programming Interfaces (APIs) continue to be made public, allowing companies to "piggy back" off each other
- **Artificial Intelligence:** Augmenting the processing capabilities of machines for human-like intelligence
- **Commercial Use of Drones:** As the FAA sets regulations over drones, and as companies invest in drone tech, their use will open up new opportunities



## Environment

- **Climate Change Vulnerabilities:** As the climate change continues, natural disasters will increasingly put vulnerable populations in danger
- **Increased Recycling:** Recycling rates have gone up as consumer expectations increasingly view the practice as a norm

# Additionally, industry, economic, and political macro factors may change the landscape in which SSA operates



## Industry

- **Enterprise Science:** Big data and algorithms are being used in predictive and preventative data-driven policies and operations
- **Redesigning Recruiting:** Firms are examining new methods of talent acquisition with regards to niche skillsets as well as diversity & inclusion
- **New Talent Deployment:** New forms of talent management include shorter assignments, virtual mobility, freelance talent, and open-source talent
- **Open Data:** Expectations of government transparency are growing while personal data is becoming more ubiquitous
- **Non-Linear Careers:** The increasingly distributed nature of work breaks up the traditional career into a “patchwork” of different jobs and projects
- **Behavioral Economics:** Insights from behavioral economics, psychology, and analytics equip federal agencies to tackle complex issues
- **Adoption of “Lean Startup” Principles:** Rapid iteration, scaling to meet needs, and the use of prototypes, are being adopted by government agencies
- **Digitizing Public Services:** Citizen-facing public services are increasingly being optimized on digital and mobile platforms for convenience
- **Cybersecurity:** As data is more ubiquitous and people more interconnected, protecting sensitive information becomes an imperative
- **Business Ecosystems:** Business challenges increasingly require breaking down traditional industry siloes for coordinated action
- **Workforce On-Demand:** With the rise of on-demand companies like Uber, new models of contracting labor are being commoditized



## Economic

- **Sharing Economy:** Consumers increasingly engage in peer-to-peer commerce allowing them to maximize underutilized assets (e.g., AirB&B)
- **Data as Currency and Asset:** By 2020 more than 80 percent of consumers will collect, track, barter or sell their personal data
- **Student Debt:** Student debt for a college education has increased 4-fold by aggregate volume over the last 20 years and is expected to rise annually
- **Dynamic Pricing:** Pay-as-you-go and surge pricing systems are disrupting traditional pricing models
- **Declining Infrastructure:** America received a D+ for infrastructure in 2013 with an estimated investment requirement of \$3.6 trillion
- **Shared Value Economy:** Companies are looking at social and environmental outcomes in addition to profit as measures of shareholder value

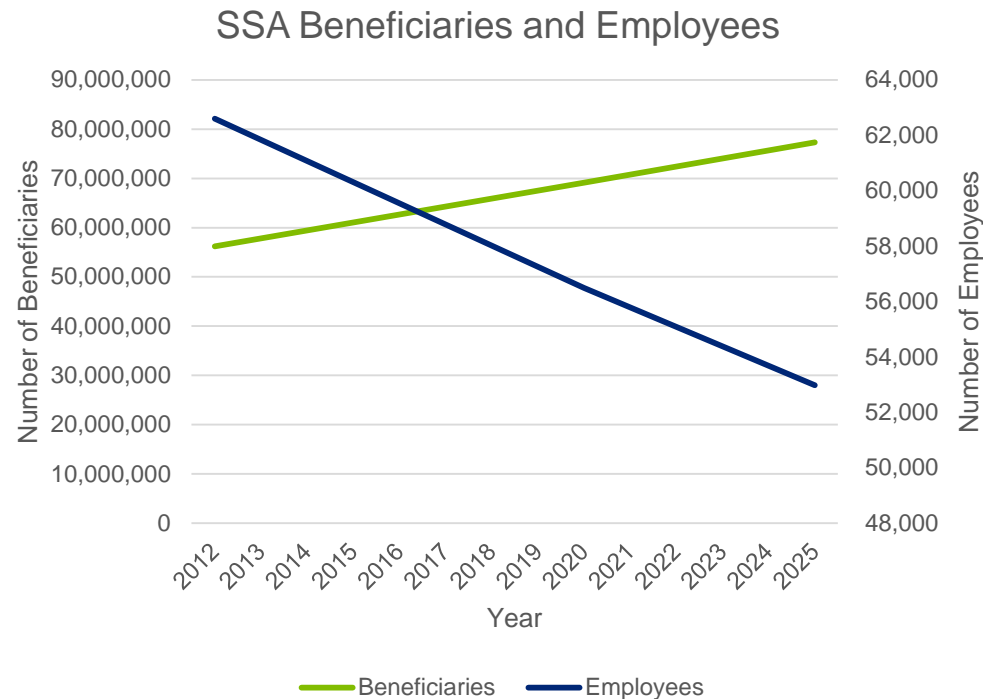


## Political

- **Polarization of U.S. Politics:** Deadlock between Democratic and Republican politicians has led to more frequent impasses
- **Criminal Justice Reform:** Recent incidents of police brutality, excessive incarceration, and racial discrimination (e.g., Ferguson) have elevated criminal justice reform

# Direct trends impacting SSA's beneficiary and employee populations require SSA to act now

SSA program beneficiaries are projected to **increase by 32% from 2015-2025**.<sup>1</sup> This increase will result in a significant demand on SSA's services, employees, and infrastructure.



Employee data past 2012 is based on GAO projections

**One-third of SSA employees are projected to retire between FY 2011 and FY 2020.** This represents a loss of intellectual capital, which may result in a workforce talent shortage and an inability to meet customer needs.

# Appendix





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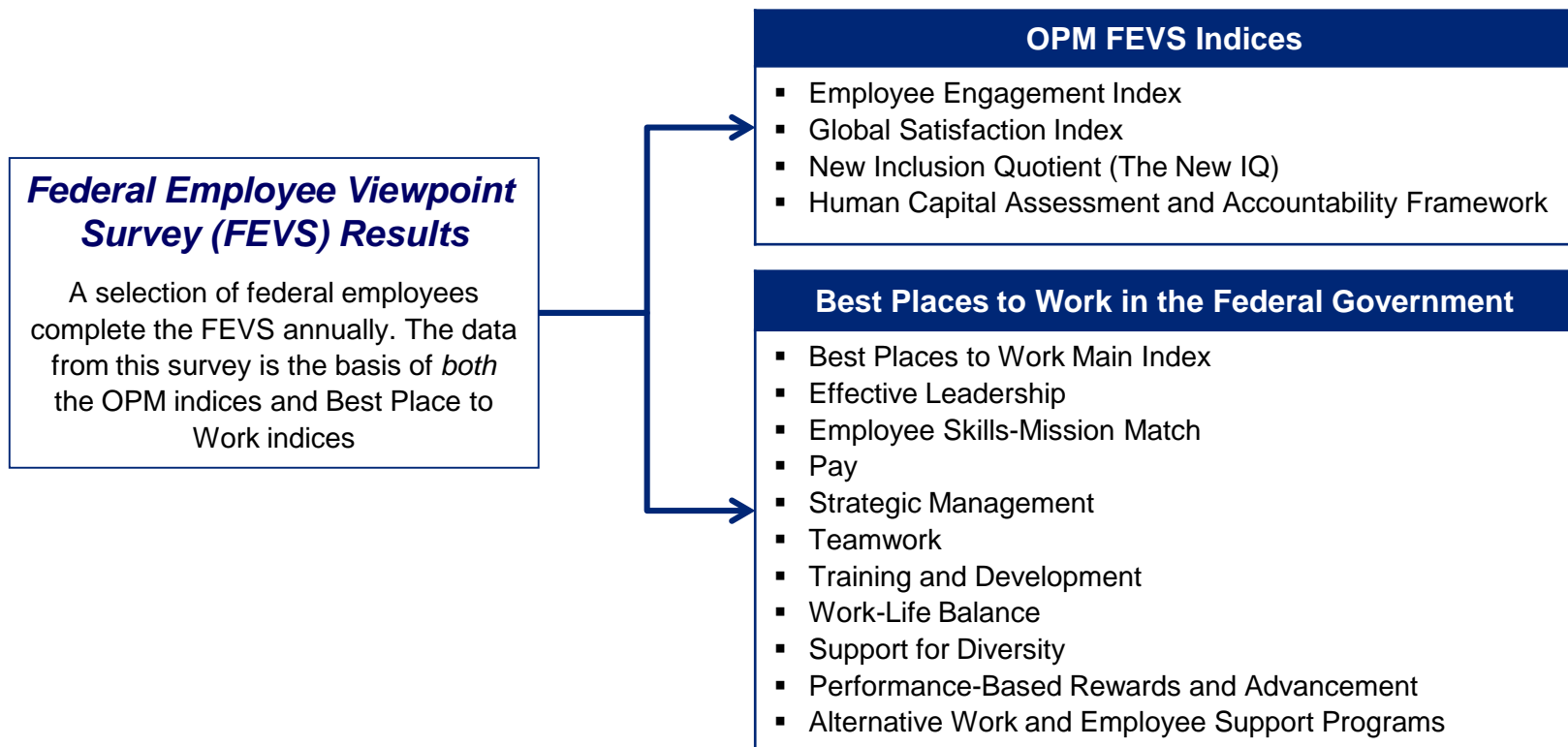
# Appendix A:

# Methodologies

# A.1 Indices

# Exceptional Employee Indices

The majority of the benchmarking research in this presentation is based on data from the Federal Employee Viewpoint Survey (FEVS). The data from FEVS feeds into both OPM Indices and Best Places to Work in the Federal Government Indices.



## Benchmarking Methodology

- This presentation incorporates both OPM and Best Places to Work in the Federal Government indices
- We selected each index based on what best matched the goals and needs of SSA
- When neither index met the needs of SSA, we independently identified appropriate questions from the FEVS and conducted additional benchmarking research

# Employee Engagement Indices

Both OPM and Best Places to Work in the Federal Government have indices that are candidates for measuring employee engagement. The pros and cons of each index is outlined below.

## OPM Employee Engagement Index

**Description:** A holistic index that incorporates fifteen questions from the FEVS to assess engagement as it's affected by leaders, supervisors, and the intrinsic work experience.

### Pros:

- A more sophisticated index that incorporates several additional factors, which will allow SSA to better understand and assess employee engagement
- Composed of sub indices (Leadership, Supervisors, Intrinsic Experience) so SSA can develop a more nuanced understanding of the drivers of employee engagement

### Cons:

- A more complex index, which may make it difficult to explain and message to some audiences
- A less popular index, which means it may not be suited for *communicating* the results of employee engagement efforts

## Best Places Overall Index

**Description:** The main index for the Best Places to work in the Federal Government. Incorporates three questions to assess the quality of the work experience.

### Pros:

- A simple index, which makes it easier to explain to some audiences
- A very popular index, which means it may be suited for *communicating* the results of employee engagement efforts

### Cons:

- This index does not incorporate several questions that address employee engagement, so it will provide far less insight into the effectiveness of efforts
- This index does not include sub indices, which further limits its potential as a measurement and tracking tool

## Conclusion

- **We recommend the use of OPM's employee engagement index for the measurement of employee engagement**
- Though the main index from Best Places to Work in the Federal Government is superior from a marketing perspective, it is a far less comprehensive index, which will significantly reduce the insight SSA can develop if used
- Best Places to Work could be used to market the outcome of efforts, while OPM is used to monitor their impact internally

# Customer Satisfaction Indices

A customer satisfaction index is a good tool for determining how ambitious SSA wants to be in improving customer satisfaction. Though there are several different published indices, few of them incorporate government agencies. In examining the indices available, this presentation incorporates Forrester's Customer Experience Index.

## ✓ Forrester Customer Experience Index (CXi)

### Pros:

- Unified cross-industry measurement of customer satisfaction enables comparison across organizations in several different industries
- CXi is supplemented with multiple case studies and additional research, which helps SSA draw deeper insight when examining scores
- Index scores are based on a holistic assessment of the customer experience

### Cons:

- This index only began to measure most government agencies in 2015, which means it lacks historical trend information for the government

## American Customer Satisfaction Index (ACSI)

### Pros:

- Has several years of government data to draw on, which allows SSA to develop insights based on historical trends
- Is the official customer satisfaction index for the government

### Cons:

- This index does not publish easily comparable aggregate or specific information regarding scores, which makes cross organizational comparison challenging
- This index focuses on IT and technology satisfaction, rather than holistic satisfaction

## Internally Developed Measure Based on Internal Data

### Pros:

- Has the flexibility to be tailored to SSA specific measures that may not be broadly applicable to other organizations
- Offers the ability to control frequency of measurement

### Cons:

- This index can not be used to benchmark other organizations (unless it includes a measure that uses data publically available for other organizations)
- This index would require baseline data to establish realistic targets for out years

# Employee Engagement Index

The Employee Engagement Index is a subset of questions from the FEVS that measures employees responses to the three areas below.

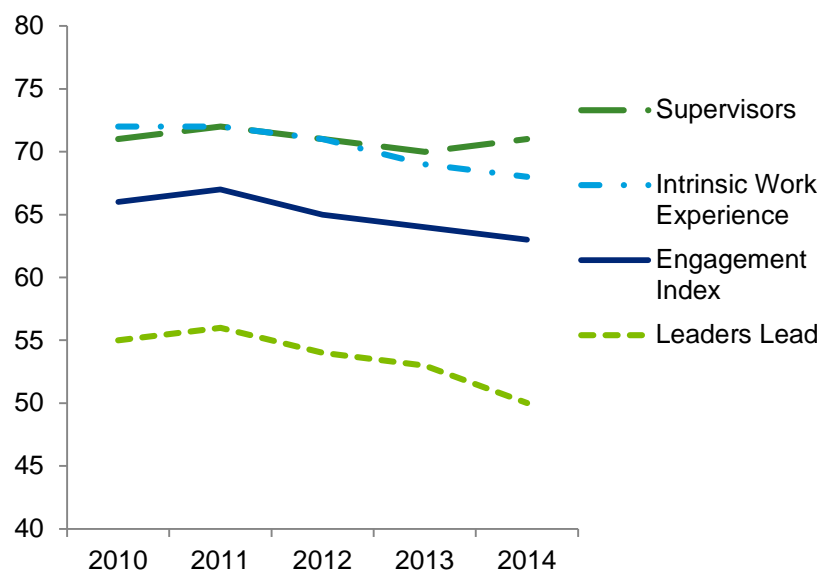
## Employee Engagement Index

**Leaders Lead:** “Reflects the employee’s perceptions of the integrity of leadership, as well as leadership behaviors such as communication and workforce motivation”

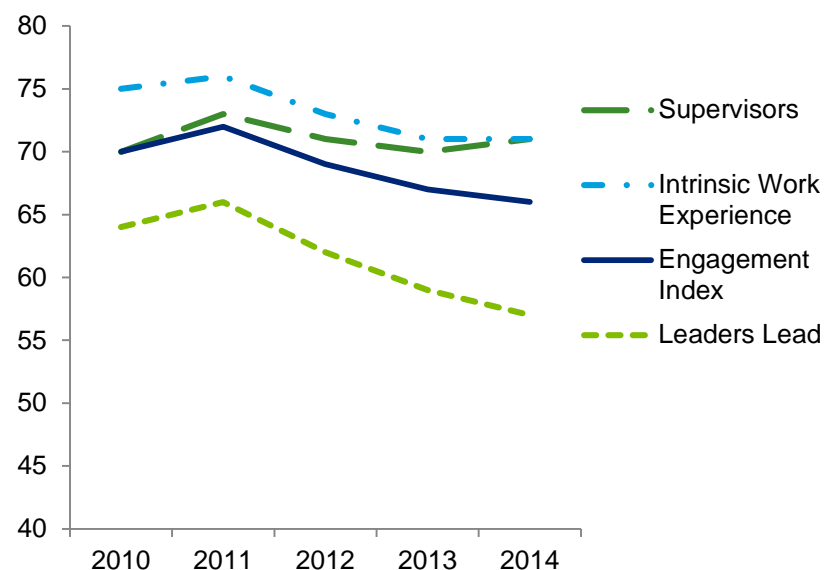
**Supervisors:** “Reflects the interpersonal relationship between worker and supervisor, including trust, respect, and support”

**Intrinsic Work Experience:** “Reflects the employees’ feelings of motivation and competency relating to their role in the workplace”

**Employee Engagement Index Trends**  
**Government Wide**



**Employee Engagement Index Trends**  
**SSA**

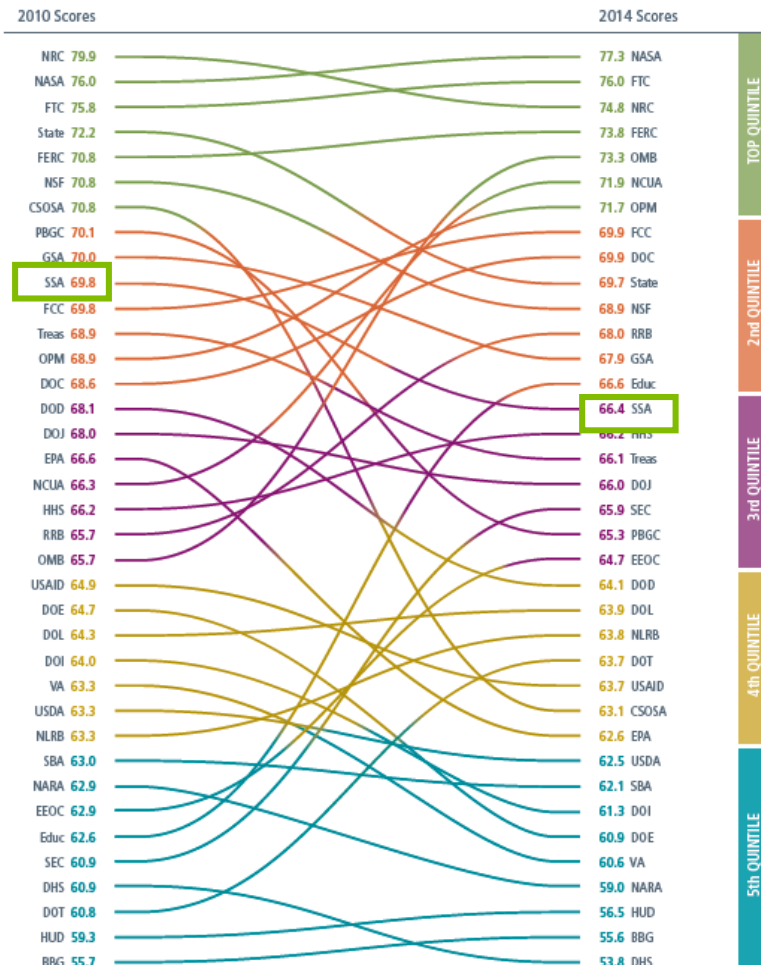


# Employee Engagement Index Relative Rankings

In recent years, SSA has had a downward trend on the Employee Engagement Index.

## Engagement Scores by Departments/Large Agencies

(Click here for Engagement Index)



## SSA Key Takeaways

- The downward trend of employee engagement over the past three years resulted in SSA moving from the second quartile in 2010 to third quartile in 2014 in relative rankings among other large agencies and departments
- The “Leaders Lead” subcomponent of the index has declined at the fastest rate and is at the lowest level compared to the other subcomponents
- The “Supervisors” and “Intrinsic Work Experience” subcomponents of the index have seen small gains since 2013
- Employee engagement is an important factor for SSA to consider because “a growing body of evidence in the public and private sector has shown a strong relationship between high levels of employee engagement and improved organizational results”



# Illustrative Innovative Organization Metrics

SSA can use a range of potential metrics to measure progress toward becoming an innovative organization.

Continuous Improvement	Adaptive Culture	Customer-Centric Infrastructure
<b><u>Process Efficiency</u></b> <b>Defined:</b> Total time and cost reductions to processes from continuous improvement initiatives	<b><u>Culture Change</u></b> <b>Defined:</b> Percentage of employees participating in continuous improvement, using knowledge-sharing platforms, or contributing to the innovative ideas platform	<b><u>Technology Modernization</u></b> <b>Defined:</b> Number of databases that have been integrated to improve customer experience (excluding databases that are intentionally separated for security)
<b><u>Data Exchange</u></b> <b>Defined:</b> Percent of customer records that are automatically updated based on external data exchanges (e.g., disability determinations where SSA uses an Electronic Health Record / Total number of disability determinations)	<b><u>Executive Accountability</u></b> <b>Defined:</b> Percentage of leaders whose performance is linked to degree to which they embrace change, risk, and innovation	<b><u>Cybersecurity</u></b> <b>Defined:</b> Assessment of cybersecurity maturity as measured via any qualified cybersecurity maturity model (e.g., NIST's cybersecurity framework)
<b><u>Data Analytics</u></b> <b>Defined:</b> Percent of initiatives that use automated data-driven monitoring and reporting		<b><u>Physical Infrastructure</u></b> <b>Defined:</b> Number of square feet shared with other agencies to improve customer experiences (e.g., total field office sq. ft. for shared IRS/SSA spaces)
<b><u>Improper Payment/Fraud Prevention</u></b> <b>Defined:</b> Percent of improper payments per benefit program		

# Illustrative Organizational Efficiency Index

Measure	Targets	Achieved	Score	Weighting
<b><u>Process Efficiency</u></b> <b>Defined:</b> Total time and cost reductions to processes from continuous improvement initiatives	1: \$A to \$B million in savings and <X hours reduced 2: > \$B million in savings and >Y hours reduced 3: >\$C million in savings and >Z in hour reduced	\$C million in savings; Y hours reduced	2	20%
<b><u>Culture Change</u></b> <b>Defined:</b> Percentage of employees participating in continuous improvement, using knowledge-sharing platforms, or contributing to the innovative ideas platform	1: A-B% of employees using knowledge-sharing platforms; X-Y% of employees contributing to innovative ideas platform 2: B-C% of employees using knowledge-sharing platforms; Y-Z% of employees contributing to innovative ideas platform 3: >C% of employees using knowledge-sharing platforms; >Z% of employees contributing to innovative ideas platform	B% of employees using knowledge-sharing platform; Y% of employees contributing to innovative ideas platform	2	40%
<b><u>Technology Modernization</u></b> <b>Defined:</b> Number of databases that have been integrated to improve customer experience (excluding databases that are intentionally separated for security)	1: A-B databases integrated 2: B-C databases integrated 3: >C databases integrated	A databases integrated	1	40%

**Index Score: 1.6**

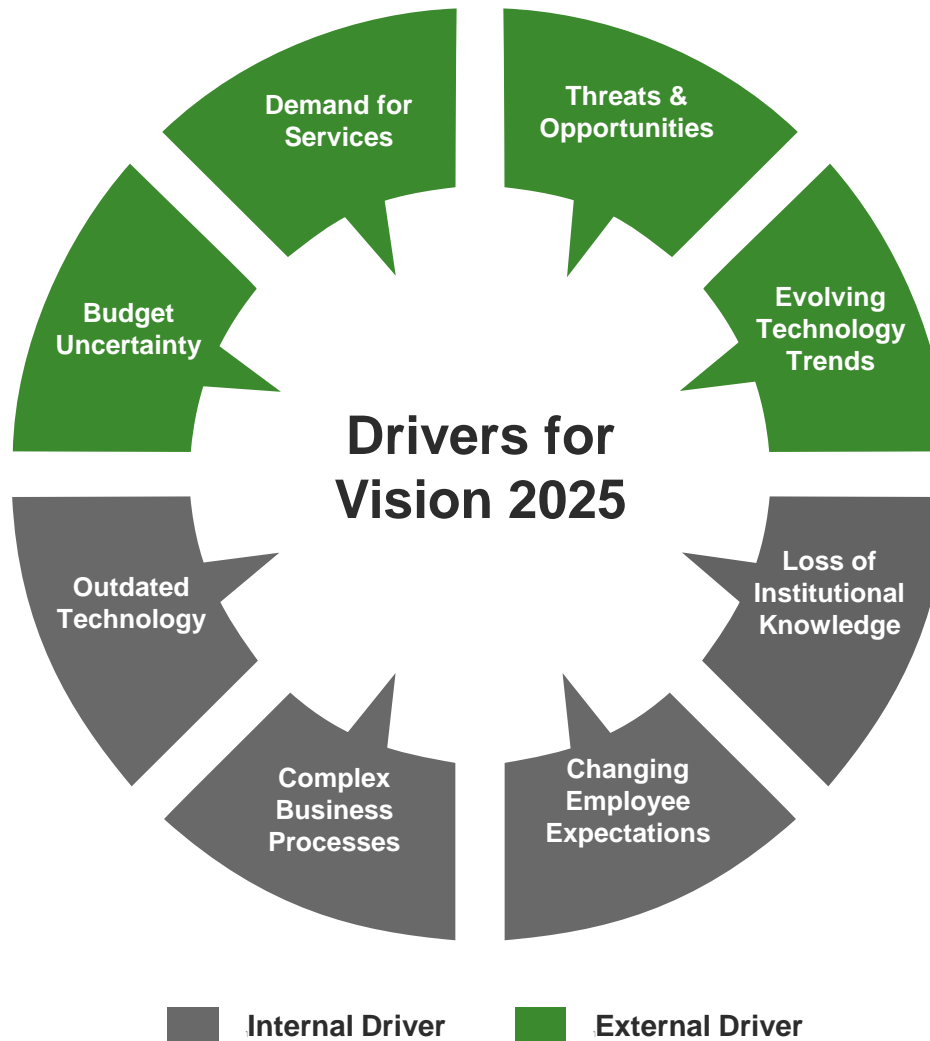
## A.2 Roadmap Development

# Methodology for Vision Roadmap version one

Through a five-step approach, we developed a recommendation for how SSA can “*proudly serve Social Security customers throughout their lifetime, when and where they need us.*”



# We used internal and external drivers to focus external research efforts



# We focused on organizations that have undergone large transformations

We developed over **30 case studies\*** through secondary research that provided proven examples of how ambitiously other organizations have pursued similar transformational efforts.

Industries researched included:

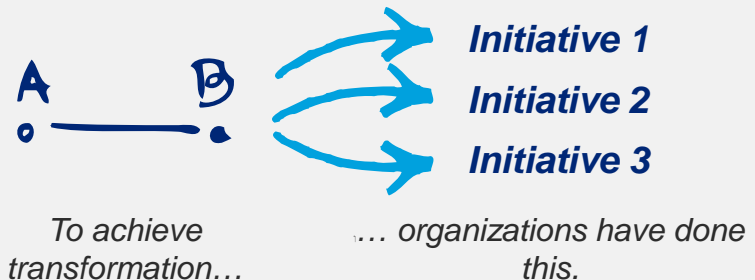
- ✓ **Federal Government**
- ✓ **State Government**
- ✓ **International Government (e.g., UK)**
- ✓ **Insurance**
- ✓ **Financial Services**
- ✓ **Technology**
- ✓ **Health Care**

We also documented **trends** focused on customer experience, employees, and innovative organizations to increase understanding of the context for transformation.



**Documented trends that provide factors for influencing the environment in which SSA operates**

We then **examined how organization achieved** similar transformations to identify initiatives SSA may want to pursue.



# Methodology for Vision Roadmap version two



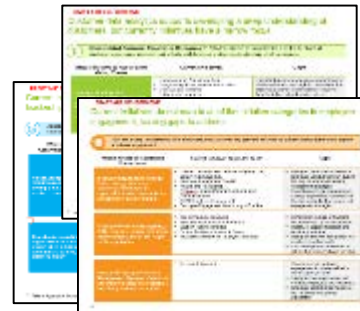
## Step 1

Reviewed current initiative inventory that lists current initiative names, descriptions, and owners generated from strategic documentation as part of phase one



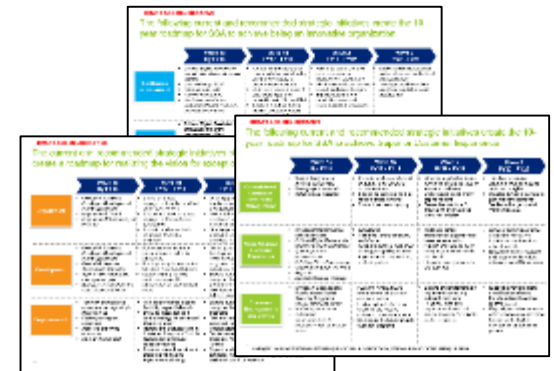
## Step 2

Conducted interviews with seven component representatives selected by the EVC and updated and consolidated current initiatives inventory based on their input



## Step 3

Assessed current initiatives against Vision objectives based on analysis of interviews with components, additional strategic documents from components, and stakeholder feedback from regional working sessions to determine initiative gaps



## Step 4

Recommended strategic initiatives to fill gaps based on version one of the roadmap, SSA stakeholder recommendations from feedback collected, and current initiative interviews. Mapped current initiatives, critical eight initiatives, and recommended strategic initiatives to the Vision Roadmap using the following criteria:

**Wave 1a** includes the critical eight and short-term current initiatives

**Wave 1b** includes medium-term current initiatives and recommended strategic initiatives that are foundational to achieving future strategic initiatives

**Wave 2** includes long-term recommended strategic initiatives that focus on expansion within SSA

**Wave 3** includes long-term recommended strategic initiatives that focus on expansion to outside of SSA

# Methodology for verification and consolidation of current initiatives



## Step 1

Reviewed current initiative inventory that lists current initiative names, descriptions, and owners generated from strategic documentation as part of phase one

Name	Description	Owner
Initiative 1	Description 1	Owner 1
Initiative 2	Description 2	Owner 2
Initiative 3	Description 3	Owner 3
Initiative 4	Description 4	Owner 4
Initiative 5	Description 5	Owner 5

## Step 2

Conducted interviews with seven component representatives selected by the EVC and updated and consolidated current initiatives inventory based on their input

- Initial current initiative set included **309 initiatives** from 25 strategic documents\*
- Interviews with seven components provided additional information on current initiatives including:
  - Outcome
  - Owner and other collaborators
  - Alignment with Vision 2025
  - Related and redundant initiatives
  - Level of initiative (e.g., overarching initiative versus a small project that could be combined with initiatives)
- Current initiatives were consolidated to **142 current initiatives** based on these interviews and review of additional strategic materials sent by components
- Of the 142 initiatives, **51 current initiatives** were labeled as potential to be transformation based on outcomes and context from interviews
- The complete list of 142 current initiatives should be reviewed using the interactive dashboard to verify labeled transformational initiatives and identify additional transformational initiatives

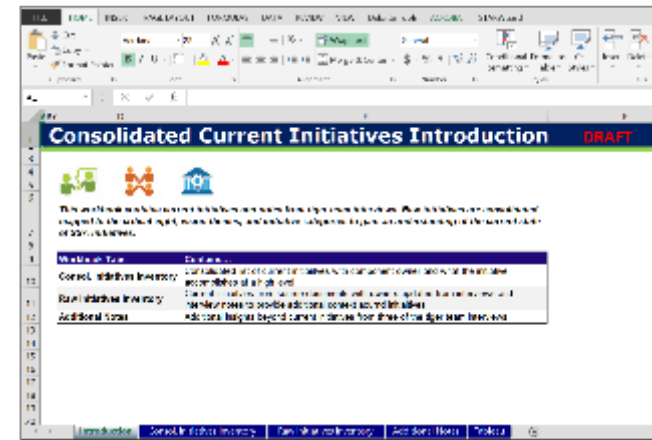


## A.3 Analysis Details

# Current initiative analysis Workbook and Dashboard Overview

The **Consolidated Current Initiatives Workbook** contains current initiatives and notes from tiger team interviews. Raw initiatives are consolidated, mapped to the Vision priorities, Vision objectives, strategies, and the Critical eight to understand SSA initiatives that align to Vision 2025 and their outcome. The spreadsheet contains the following tabs:

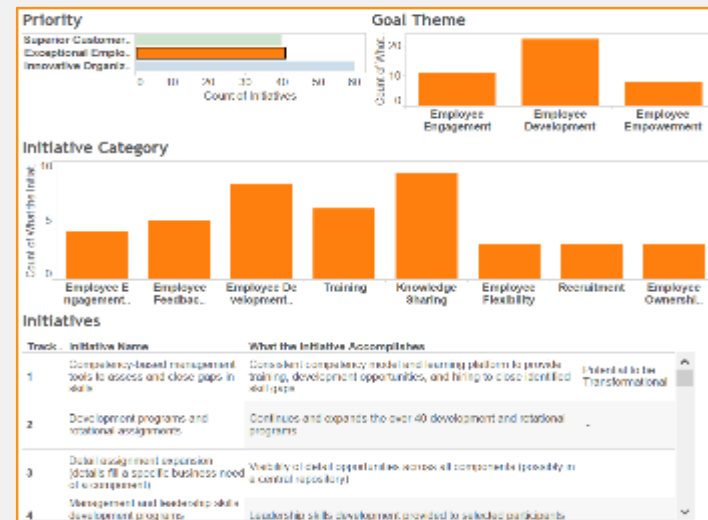
1. Consolidated Initiatives Inventory
2. Raw Initiatives Inventory
3. Additional Notes
4. Tableau Data



## Overview of Tabs

1. **Consolidated Initiatives Inventory** – lists all current initiatives and the following information:
  - Overview of what the initiative accomplishes
  - Ranking of how transformational the initiative is
  - Component owner
  - Alignment (if applicable) to Vision priority, Vision objective, Strategy, and Critical Eight
2. **Raw Initiatives Inventory** – contains a more detailed initiative description and notes from tiger team interviews
3. **Additional Notes** – provides key takeaways and insights from component tiger team meetings, as well as key initiative implementation dates
4. **Tableau Data** – data utilized for the Current Initiatives Tableau dashboard

## Dashboard Functionality

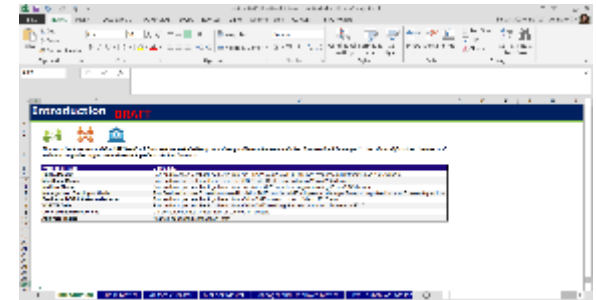


The **Tableau dashboard** contains all the current initiatives in the spreadsheet. Click on each Vision priority, Vision objective, and strategy to filter the view of current initiatives.

# Vision 2025 Feedback Master spreadsheet overview

The **Vision 2025 Feedback Master spreadsheet** provides the structure to consolidate and analyze all stakeholder feedback. Once the raw data (input/idea) is entered into the appropriate worksheet, code the data by:

1. Priority
2. Vision objective
3. Critical Eight relevance
4. Strategy



## Coding Instructions

1. Identify if the data applies to any of the **Vision 2025 priorities**:

- Superior Customer Experience
- Exceptional Employees
- Innovative Organization

2. Within the identified priority, decide whether the data falls under a priority **Vision objective**:

*Superior Customer Experience:*

- Consolidated Customer Experience Management
- Omni-Channel Customer Experience
- Customer Empowerment and Choice

*Exceptional Employees:*

- Employee Engagement
- Employee Development
- Employee Empowerment

*Innovative Organization:*

- Continuous Improvement
- Adaptive Culture
- Customer-Centric Infrastructure

3. Determine if the data is relevant to a **Critical Eight initiative**

*Note: This column should code data by the current priority agency-wide initiatives (e.g., FY17's Critical Next). The spreadsheet will need to be updated with priority initiatives as they are determined.*

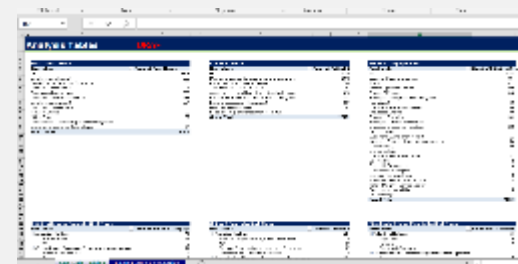
4. Determine if the data applies to a Vision objective's **strategy** (see Vision Roadmap for strategy descriptions)

## Analysis Instructions

In the worksheet tab titled "Analysis Tables", pivot tables are set up to automatically provide data coding counts. The following counts are provided:

- Vision Objectives
- Critical Eight Initiatives
- Strategies
- Strategies by Vision Objective
- Critical Eight Initiatives by Vision Objective
- Stakeholder Mentions by Vision Objective

These counts can be used for analysis purposes to provide insight into stakeholder feedback trends, as well as quantifiable analysis behind ideas and recommendations.



# Vision Roadmap by the Numbers



## Three Vision Priorities

**Nine** Vision Objectives

**25** Vision Strategies

**17** Vision Outcomes\*

**142** current initiatives aligned to Vision 2025

**51** current initiatives with potential to be transformational

**79** recommended transformational initiatives\*

**Over 29,000** employees represented in feedback

# Appendix B:

## External Research

## B.1 Case Studies

# Continuous Transformation to Drive Persistent Excellence

Some organizations have already achieved customer experience excellence, but have recognized the need to continually transform and invest in the customer experience exceed rapidly increasing expectations.

## Maintain Excellence

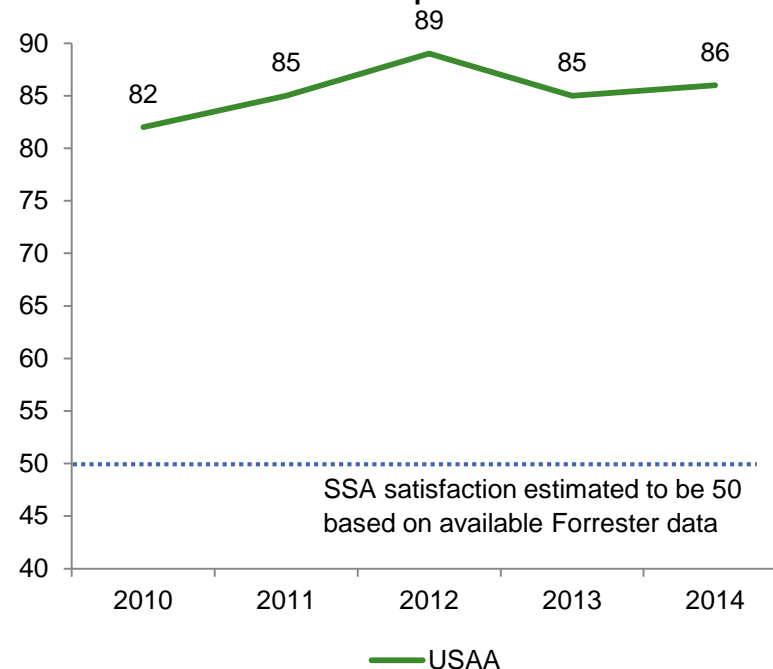
Some organizations have achieved and maintained customer experience excellence by continually seeking new ways to integrate customer centricity into their org structure and processes, investing in customer centric technology, and innovating to *exceed* ever increasing customer expectations.

Consider...



- USAA created a new position in 2010: Executive Vice President (EVP) of Member Experience
- Reports directly to CEO; USAA consolidated all marketing, sales, channel management, and service functions (9,000 staff) under the new position
- Following reorganization, EVP promoted customer centricity across the organization and deeply researched the customer
- Efforts have reinforced customer centricity across the organization (e.g., USAA evaluates all tech investments based on customer impact)

Forrester Customer Experience Index Scores



## Characteristics of Goals focused on Maintaining Strength

Organizations can maximize impact by providing customer senior leaders with operational control

Organizations need to honestly assess whether they are ready for the radical transformations required by customer centricity

Prioritize understanding the customer and cultural change at the outset of customer-centric organizational change

# Overhaul Organizational Structure and Operations

Many organizations have managed to improve their Forrester customer experience index (CXi) scores by dozens of points over a few years. It may be possible for SSA to achieve similar improvements.

## Radical Improvement

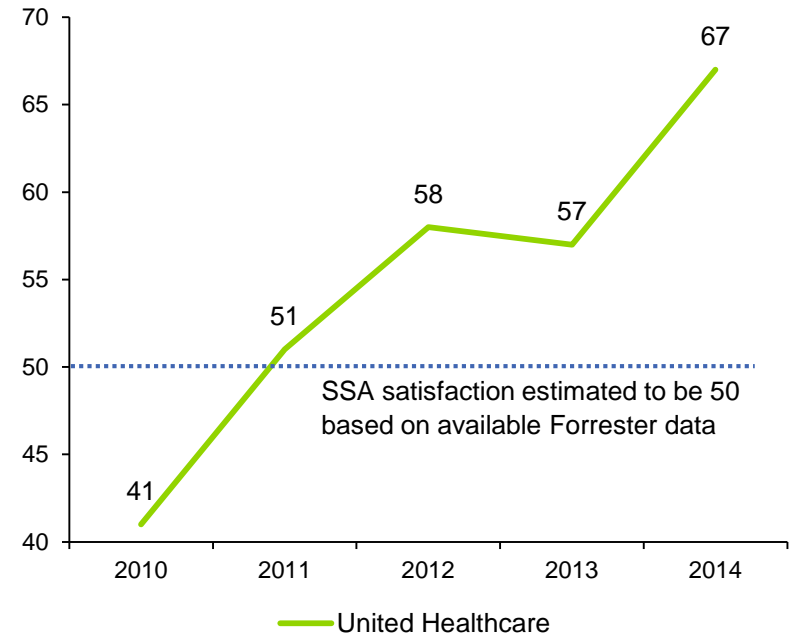
Many organizations have achieved drastic customer satisfaction improvements by developing a deep understanding of their customer and changing their organization to serve them. Radical changes often require significant resource investments and the organizational commitment to see the change through.

Consider...



- United Healthcare Appointed VP to manage customer satisfaction at the beginning of 2011
- VP given authority to work across organizational boundaries and at all levels
- VP built a customer-centric culture across traditional organizational boundaries
- VP developed a detailed Journey Map to deeply understand customers
- VP messaged customer's journey to line personnel

Forrester Customer Experience Index Scores



## Characteristics of Transformative Customer Satisfaction Goals

Create senior leaders responsible for the customer experience and empower them to work across the organization

Build a customer-centric culture at every level of the organization

Develop a deep and nuanced understanding of the journey your customer takes



# Maintain and Capitalize on Existing Capabilities

Most organizations have managed to maintain or improve their CXi scores by 5-10 points over a few years. It may be possible for SSA to achieve similar improvements.

## Significant Improvement

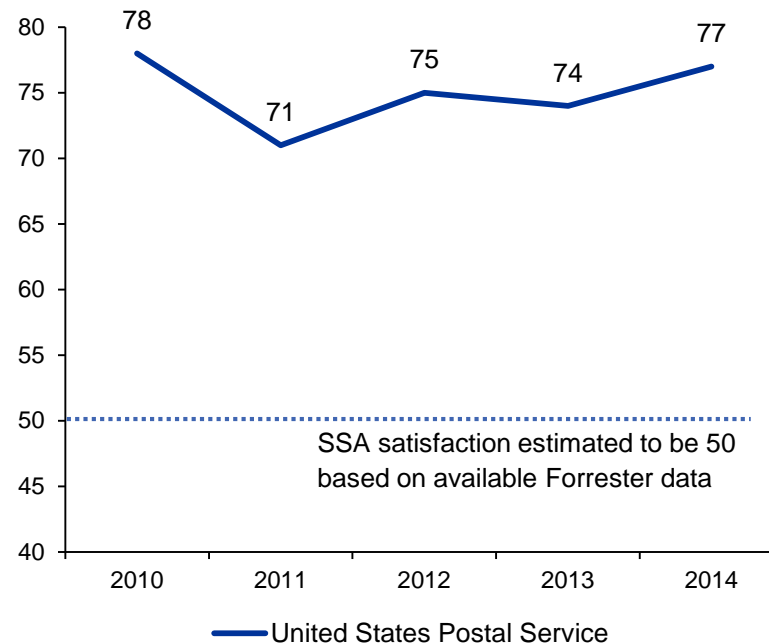
Many organizations have maintained strength or achieved significant customer satisfaction improvements by focusing on practical goals that align with existing organizational capabilities. By taking advantage of existing organizational units and capability, this approach is practical and relatively low risk.

Consider...



- Implemented strategic focus on customer satisfaction in 2011 after a drop from 2010
- Implemented a series of department/office-specific customer experience initiatives between 2011 and 2014
- Relied on traditional tools and processes (e.g., POS survey, focus groups) to understand the customer's needs
- Ownership of customer satisfaction distributed across the organization; partially centralized in 2014

## Forrester Customer Experience Index Scores



## Characteristics of Goals focused on Maintaining Strength

Make the customer experience a strategic priority for the organization

Identify high impact department/office-specific initiatives and execute them via an existing governance structure

Identify and empower customer experience owners across the organization

# Achieve Improved Understanding of Customer Experience

Some organizations maintain a deep and nuanced understanding of the quality of their customer experience by designing meaningful measurements and collecting/ publishing the relevant data, even when it's not a positive story.

## Customer Experience Measurement

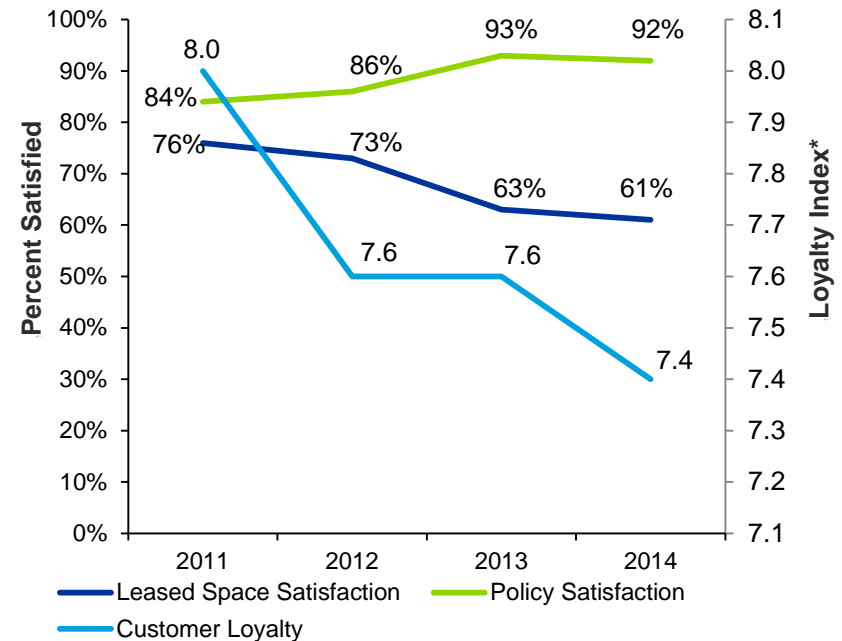
Consider...



**General Services  
Administration**

- GSA was an early adopter of customer satisfaction measurement in the government, and has been collecting certain measurements, like leased-space satisfaction, since the late 90s
- GSA has specific teams dedicated to understanding the quality of their customer experience
- GSA reports on customer satisfaction metrics even when it fails to achieve its targets
- GSA can implement targeted improvement plans by measuring program specific success

Select GSA Customer Satisfaction Measures



“**Loyalty Index**” is created by averaging responses to questions like “How likely are you to recommend [program office] to others?”. 1=“Not at all likely” and 10=“Very likely”.

## Characteristics of Customer Experience Measurement

Develop and use both an overarching customer experience measurement and program specific measurements

Don't shy away from reporting, even when the data doesn't say what you want it to say

Minimize the bias in customer experience metrics by ensuring the sample is representative

# Channel Choice

Some organizations improve their customer experience by allowing customers to choose their preferred channel to complete transactions and by expanding access to new channels based on customer demand.

## Channel Choice

Channel choice means a customer can select the service channel that best meets their needs given their individual circumstances. This may involve creating new channels (e.g., mobile) when existing's channels don't meet customer needs and expectations.

Consider...

### DEPARTMENT OF MOTOR VEHICLES

Department of Motor Vehicles offices around the nation have been improving the customer experience by creating new channel options. The Las Vegas DMV launched an online portal, placed service kiosks at partner locations, and created a program with auto dealerships for customers to complete registrations and receive license plates in the mail, resulting in:

*Processed online*

**717,940**

*transactions from May 2013  
(launch month)– March 2015*

*Processed*

**577,771**

*kiosk transactions  
in FY2014*

*Served*

**1,734,367**

*customers at DMV  
locations in FY2014*

### Key Gallup Survey Findings on Channel Choice using Banking Channel Preferences

- **Customers can't always use the channel they prefer** – At financial institutions, customers use a non-preferred channel 11%-30% of time
- **Customer experience drops when they can not access a preferred channel** – At a selection of financial institutions:
  - Satisfaction dropped by up to 18%
  - Engagement dropped by up to 13%
- **Customers vary widely in preferences** - “Randomly selected sample of 3,000 retail banking customers; customers used more than 750 unique combinations of channels to accomplish their banking needs”

## Characteristics of Channel Choice Goals

Recognize core drivers of customer channel frustrations and works to address those drivers

Explore enabling technologies and policy changes that enable channel choices

Provide the flexibility to meet the unique needs of each customer

# Channel Nudges

Many organizations help customers move to the channels that may better meet their needs by providing subtle nudges that educate them on advantages of each channel and encourage them to make the jump.

## Channel Education

Channel education occurs when an organization makes a concentrated effort to inform customers about the channels available to them and the advantages of each channel. The most successful education efforts tailor their messaging based on customer preferences. There is little use in educating customers on things they don't care about.

Consider...



HMRC is the UK's revenue collection service. HMRC performed detailed customer research to understand existing preferences. They then educated their customers on how online tax filing better met these preexisting preferences.

*Prior to communication*

**77%**

**aware** they can pay online



*After communication*

**98%**

**actually file** online

## Channel Incentives

Channel incentives occur when an organization provides subtle encouragement to use a specific channel. This can help a customer overcome ingrained habits when a channel that better meets their needs is available for their use. Incentives are about helping the customer use the channel that is right for them given their specific circumstances.

Consider...



Companies House manages the incorporation and dissolution of corporations in the UK. Corporations were able to perform their annual filings through paper-based and online channels. By reducing the online filing fee they saw online use increase.

*Prior to fee reduction*

**5%**

used online channel



*After fee reduction*

**30%**

used online channel

## Characteristics of Channel Nudging Goals

Develop a deep understanding of the customer and demonstrate how specific channels address their challenges

Do not penalize the use of any specific channel

Provide encouragement to overcome the bias toward doing the same thing

# Channel Expansion

Many organizations have begun to create new channels and expand what they offer through existing channels to improve the customer experience.

## Channel Expansion

Expansion occurs when an organization finds new ways to reach its customers. For example, when a bank launches its first mobile app, it's expanded to a mobile channel. Expansion also occurs when an organization adds new products and services to a channel. Both require significant resources, but rarely require an organization to retrofit and overhaul the systems of existing channels.

Consider...



A multinational banking and financial services corporation with over 240,000 employees. In 2011, they wanted to expand how customers accessed services via their mobile channel. They created and launched a mobile app for the iPad to complement their iPhone app.

Over  
**5000**

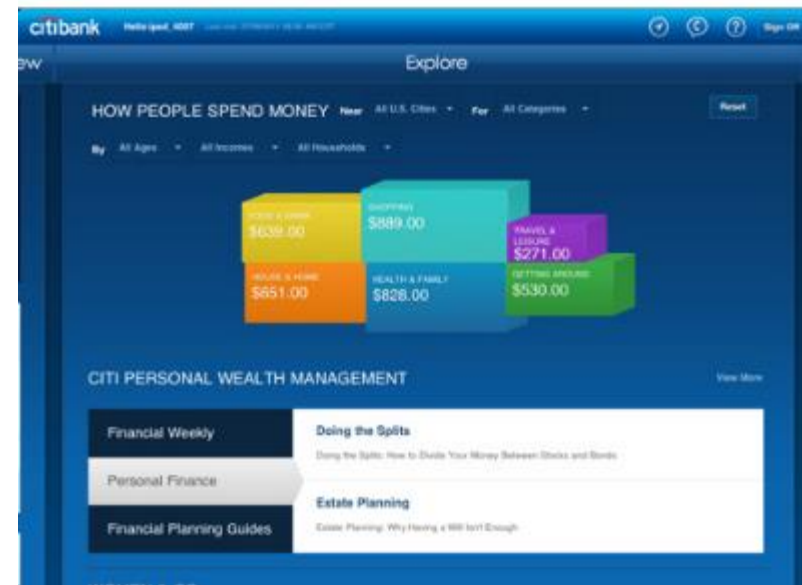
Users took their first  
step with mobile  
banking after release

Over two thirds of users  
ranked the app with

**4-5 Stars**

App had  
**2x**

The adoption rate of  
their phone app



## Characteristics of Practical Cross Channel Service Goals

Researches customers to understand what new channels they demand most and what services they want added to existing channels

Sets clear goals for what new channels should accomplish, but provide implementers flexibility in design and creation

Trends focus on digital channels as currently driving most expansion opportunities

# Channel Integration

Many organizations have improved their cross channel service by making the front and back-end system investments necessary to provide an integrated multi-channel experience.

## Partial Channel Integration

*Occurs when an organization identifies the most important links between channels for a customer and implements the technology, processes, and training necessary to bridge the divide. For example, if most customers visit an organizations brick and mortar locations and browse their mobile sites, it makes sense to integrate those two channels.*

*Consider an...*

### American Loan Provider

That wanted to improve its call center experience by integrating it with its digital channel. They implemented a system that allowed call center employees to directly access and view a customer's web session

*Reduced call time by:*

**50%**

*Retained*

**25%**

*of customers that abandoned  
online sessions by contacting them*

## Full Channel Integration

*Occurs when an organization implements the technology, processes, and training necessary to integrated every single one of its channels. This provides customers with a seamless multi-channel experience, but requires significant organizational investment.*

*Consider...*

**BBVA**

An international bank headquartered in Spain with over 100,000 employees, which implemented a multi-year overhaul of channel management systems. They enabled real-time processing of data across all channels.

*Reduced time required to  
create a new account from:*

**40 minutes to  
5 minutes**

*Improved:*

**Customer  
loyalty**

## Characteristics of Ambitious Cross Channel Service Goals

Integrates two or more existing channels together to provide a more unified customer experience

Invests in improved back-end architecture of technology

Integrates channels based on understanding of the customer's journey

# Individually-Tailored Service

Many organizations have tailored their services to meet the specific needs and improve the experience of individual customers.

## Individual Personalization

Occurs when an organization interacts with their customers on an individual level to create a highly customized and relevant service experience. Organizations can personalize service by adjusting both the content of service and how it's presented. For example, when logging into an account on a webpage, the site may welcome a customer by name and display a personalized view of content based on knowledge of the customer through stated or inferred individual customer preferences.

Consider...



Nationwide is an insurance and financial services company with over 31,000 employees and \$30 billion in annual revenue. Nationwide used technology to create a tailored service by implementing a rules-based live chat service that identified when customers were struggling with their web resources and automatically placed them into live chat with a customer service representative.

*Captured*

**40%**

*of at-risk customers struggling with the website*

*Achieved*

**4.08 out of 5.0**

*satisfaction score for live chat interventions*

### Elements of Personalization

#### Differentiated Content

- Follow-up based on user actions (e.g., post-call email with additional resources)
- Recommendations based on action (e.g., customers with X also enrolled in Y)
- Phrasing/wording (e.g., enroll now! vs. save time and enroll)

#### Differentiated Presentation

- Overall layout (e.g., webpage with application feel vs. traditional page)
- Format (e.g., highlighting or bolding)
- Message placemat (e.g., information on the top, side, or bottom)

## Characteristics of Individually-Tailored Service Goals

Has or creates the capability to collect and analyze data on all individual customers

Personalization has a defined set of possible adaptations and user behavior sets

Highest degree of tailoring requires cross-channel interaction to provide personalized information across multiple channels



# Customer Segmentation to Tailor Service

Many organizations segment their customer base by shared characteristics and tailor their services to the customer segments to meet the needs of the segment.

## Segment Personalization

Occurs when an organization analyzes characteristics of their customer base to create distinct segments. A relevant and customized experience is created for the segments through providing differentiated service content to the segments based on characteristics of the group. For example, students who use an online login for their student checking account may see content focused around student loans or how to build credit.

Consider...



Barclays is an international bank with over 150,000 employees and 48 million customers. They segmented their customer base to better understand and serve their customers, and identified students as a key but underserved demographic. They analyzed data, held focus groups, and implemented service changes based on better understandings of the customer segment of students.

Goal of

**25%**

*student account growth*

Achieved

**34%**

*student account growth*



## Characteristics of Customer Segmentation Goals

Criteria for creating segments of customer base is collectively exhaustive and may be mutually exclusive

Understands the differentiated aspects of their customer base that are crucial to effective personalization

Has or develops the ability to collect and analyze information about customer base



# Improved Access, Communication, and Engagement Activities

Over the past four years the top three organizations for employee engagement have remained consistent. These three are able to achieve and maintain top performance through a series of engagement activities at the organizational level.

## Sustained High Levels of Engagement

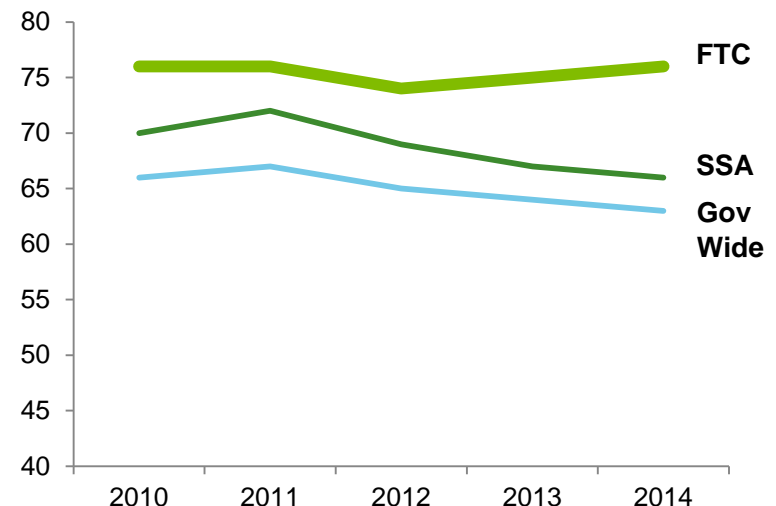
Agencies have sustained high levels of employee engagement through continually assessing employee needs, creating opportunities for feedback and development, and facilitating collaboration across all parts of the organization.

Consider...



- Promotes collaboration, transparency, accountability, and a flat organization through a series of initiatives, including:
  - **Two-day new-employee retreat** that conveys agency mission and facilitates peer connections
  - **Increased access to top leadership** by hosting lunches and events for staff to meet and interact with Chair, CFO, etc.
  - **Development of communication tools** (e.g., FTC Daily and Ask Me Anything Sessions) to provide updates and collect feedback
  - **Opportunities to change work** functions and roles for employees
  - **Community engagement initiatives** for employees to share knowledge

**Employee Engagement Index Trends  
FTC, SSA, and Overall**



## Characteristics of Transformative Employee Engagement Goals

Continually create initiatives that reach all levels and functions of employees

Develop internal mechanisms for capturing and acting on employee feedback beyond the Federal Employee Viewpoint Survey

Recognize the diverse needs of the organizations workforce and aim to develop an inclusive environment

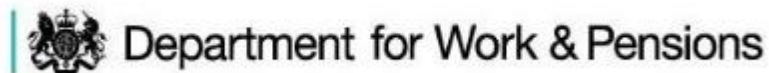
# Achieving Continuous Employee Feedback and Participation

Some organizations are developing systems to solicit and implement innovative ideas from employees. This both improves employee engagement and continuously improves the organization's processes and technology.

## Continuous Feedback

Employees want to take ownership of their work and see their decisions and input have a meaningful impact on their workplace. Organizations can channel this impulse into continuous improvement by actively soliciting employee feedback and implementing the changes they propose.

Consider...



- Launched the Bright Ideas portal to encourage innovation and improvement
- Employees can submit ideas via the portal and they're reviewed by colleagues and stakeholders
- If promising, the ideas will then receive funding and are implemented as an innovation pilot

Over	Approximately	Over	Over
<b>64,000</b>	<b>9,410</b>	<b>1,300</b>	<b>\$25 million</b>
<i>staff participating</i>	<i>ideas proposed in</i>	<i>Implemented in</i>	<i>in savings per year</i>
<i>after two years</i>	<i>first two years</i>	<i>first two years</i>	

## Encouraging Participation

The U.K. Department for Work and Pensions (DWP) uses **clever tools to promote participation and vet ideas**:

- Uses gaming concepts like leaderboards to promote participation
- Uses market dynamics to help vet ideas: users have a limited number of points that they can "invest" in ideas, which makes them more visible. When an idea is implemented and successful, all investors receive a return that they can invest in future ideas

## Characteristics of Reduced System Risk

Use communications and gamification to promote participation.

Develop processes to fund and implement the best ideas proposed to encourage continuous participation.

Involve the community in the idea selection process.

# Cultural Change to Drive Engagement

While employee engagement has been on a downward trend overall, some large agencies and departments have been able to improve their index scores over the last four years. It may be possible for SSA to achieve similar improvements.

## Engagement Improvement

Agencies have achieved significant improvements to employee engagement by making organizational changes. “Agencies that have successfully changed their culture report that it takes about three years of consistent focus before sustained results are typically achieved.”

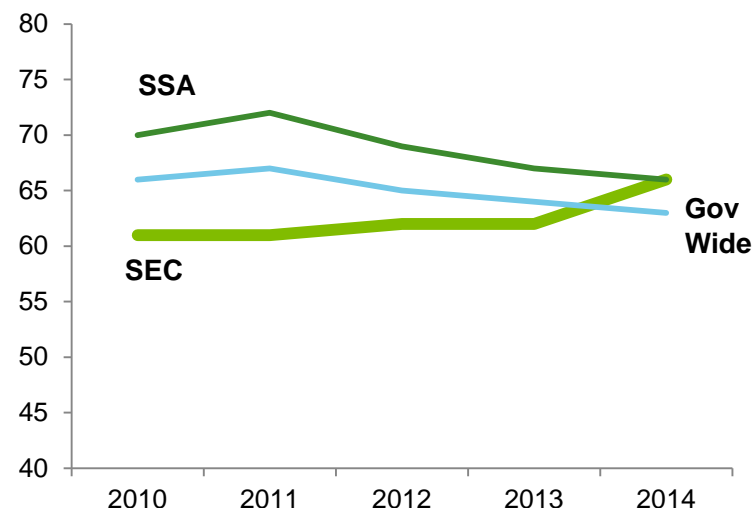
Consider...



### Securities and Exchange Commission

- **Improved index score five points moving from the fifth quintile to the third**, while other large agencies and departments declined an average of three points
- **Made employee engagement a top priority** and improved communication, offered more training and resources, worked to support creativity and innovation, and work-life balance
- **Created an agency-wide cultural change initiative** called “All Invested,” which brought management, employees, and labor relations together to open lines of communication

**Employee Engagement Index Trends  
FTC, SSA, and Overall**



## Characteristics of Focused Improvement Employee Engagement Goals

Create a new initiative at the organizational level to improve internal communications

Focus on internal communications as a primary area for evaluation and improvement

Incorporate need for overall cultural shift across employee base

# Employee Flexibility and Celebrations in the Private Sector

Some private sector organizations promote employee engagement by investing in efforts to improve organizational culture and leadership.

## Private Sector Engagement

Organizations have achieved high levels of employee engagement by creating a desirable working environment, demonstrating the connection between work responsibilities and meaningful outcomes, encouraging leaders to act with integrity and care, and providing opportunities for employees to be successful through communications and development.

**Edward Jones**

MAKING SENSE OF INVESTING

- “Edward Jones invests heavily in its associates' success, making sure they have **the training, guidance, and work/life balance they need to thrive**”
- Employee engagement is promoted through:
  - Multiple **celebrations at branch and home offices**
  - Associates **can transfer to another branch** without losing seniority or benefits
  - Offers **telecommuting**, retirement planning, and unpaid sabbaticals
- 97%** of employees are proud to tell others they work at Edward Jones

## EMPLOYEE RATINGS



LEGEND

OFTEN OR ALMOST ALWAYS

SOMETIMES

Ranked in 2015 as

**1**

in Great Workplaces for  
financial services

Ranked in 2015 as

**6**

in Fortunes 100 Best  
Companies to Work for

## Characteristics of Private Sector Employee Engagement Goals

Foster an environment that promotes competent leadership and provide a clear direction and vision for the organization

Connect employees to the meaning and outcomes of their work

Promote the free and transparent exchange of ideas and information at all employee levels

# Assessment and Knowledge-Sharing to Improve Recruiting

Though no organizations have achieved transformative growth, some have maintained strong overall scores by executing coordinated strategies that focus on knowledge-sharing and management.

## Maintain Strategies and Coordination

Successful agencies develop and execute recruiting strategies that go beyond complying with executive orders. Some of these strategies are characterized by a focus on using data-driven methods to identify recruiting best practices within large agencies and an effort to spread those practices across an agency.

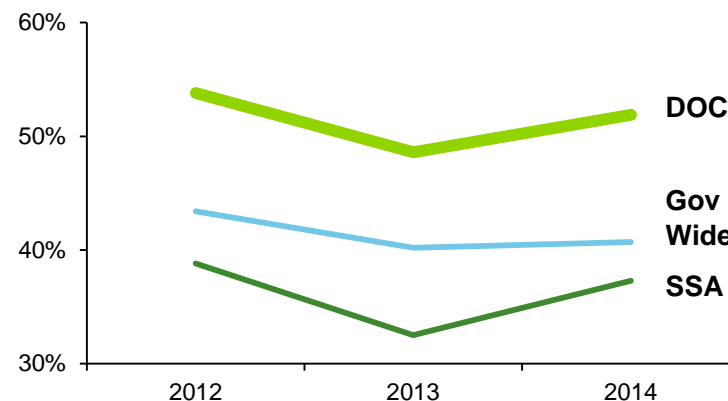
Consider...



### Department of Commerce

- In the Department of Commerce's 2013-2015 strategic plan they focus efforts on:
  - Using existing "Delegated Examining and Human Capital Assessment and Accountability Framework audits" to identify recruiting best practices to spread across the agency
  - Developing an enterprise approach to learning and collaboration
  - Continually assessing and refining the agency's 80-day hiring model to identify and remove bottlenecks

Percentage of respondents that feel they can recruit candidates with the right skills



The Department of Commerce has consistently outperformed the federal government average. It's recruiting strategy focusses on encouraging collaboration among HR personnel.

## Characteristics of Maintaining Superior Recruiting Strategies and Coordination

Develop an HR strategy that explicitly addresses the unique challenges of federal recruiting

Develop processes and tools for identifying recruiting best practices

Develop communities to foster the spread of best practices across the organization

# Creative Partnerships and Outreach

Agencies can use outreach efforts to attract a diverse pool of highly qualified applicants and improve recruiting outcomes. The relationships developed via outreach efforts can prove to be more effective than traditional candidate marketing.

## Recruiting Improvement

Agencies can improve recruiting outcomes by identifying organizations that have historically been feeders of highly qualified applicants. Once identified, they dedicate efforts to building strong relationships with these organizations to help secure a stream of qualified applicants.

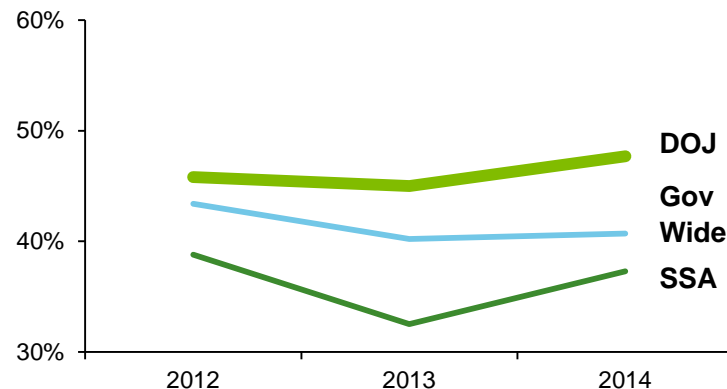
Consider...



**Federal Bureau of Investigation**

- The FBI has improved the effectiveness of its recruiting efforts by:
  - Identifying universities that serve as feeders through data analysis
  - Focusing efforts on identifying universities with diverse student bodies
  - Partnering directly with marketing students and professors at target universities to develop and deploy extremely tailored recruiting messaging on campuses

Percentage of respondents that feel they can recruit candidates with the right skills



The Department of Justice has consistently outperformed the federal government average. The FBI's recruitment strategy incorporates close coordination with target universities.

## Characteristics of Modest Recruiting Improvement

Use data to identify external organizations that can serve as feeders

Consider partnering directly with organizations in your target community to improve effectiveness

Tailor recruitment efforts for the most promising partners and candidate pools

# Full Organizational Engagement with Recruiting

Some private sector organizations drive successful recruiting by developing and encouraging a universal and active recruiting culture.

## Private Sector Recruiting

Recruiting is a siloed function for many organizations. However, some organizations incorporate recruiting into their broader culture and make it a core part of how they do business. Additionally, these organizations work to treat candidates like customers, and to provide them with the best recruiting experience possible.

Consider...



- Developed an organizational culture where every employee, former employee, and supplier was made aware of their responsibility to be continually searching for talent
- Emphasizes an old-school high-touch relationship with candidates, and use their customer relationship management frameworks to support their recruiting process

## Outcomes

The newly developed Talent acquisition model was projected to be profitable in 24 months, but that goal was **actually reached in 13**.

They **reduced time to fill by 18 days**.

They **reduced their cost per hire by 51%**.

They **reduced their search firm fees by 78.3%**.

They **improved their quality of hire** (average performance rating increased by 1.2 points).

They reached a **56% employee referral hiring rate** with no bonus payouts.

## Characteristics of Private Sector Employee Engagement Goals

Enlist all current and former employees in the recruiting effort

Treat candidates and potential candidates like customers

Don't be afraid to be proactive and deliberate in recruiting efforts

# Provide All OPM Flexibility Options

Across the board, the federal government received high marks for its telework and AWS programs. SSA posts impressive satisfaction rates, but still lags behind the government average despite recent improvements.

## Achieving and Maintaining Expected Flexibility

Meet government employee expectations by providing robust telework and AWS technology and options. This requires creating a workplace that supports flexible work, encouraging frontline managers to approve flexibility requests, and ensuring technology allows employees to work remotely.

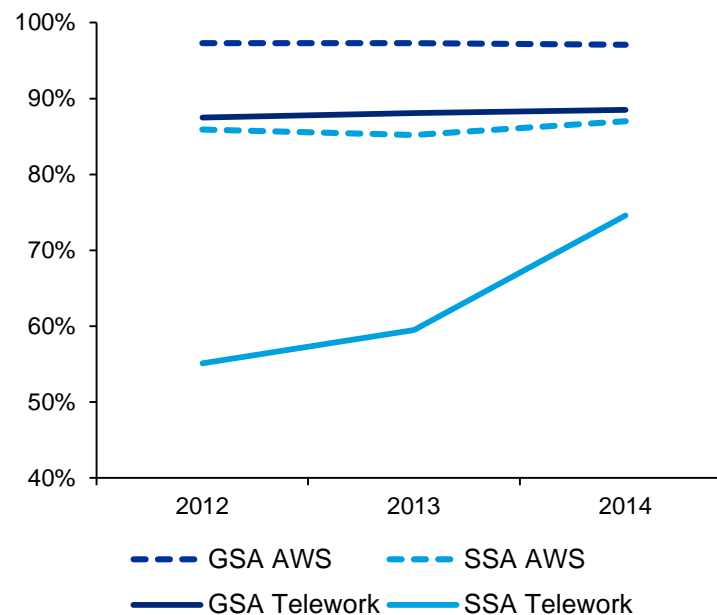
Consider...



**General Services  
Administration**

- GSA has adopted the core belief that **“Work is what we do, not where we are”** and invested in that vision
  - For example, GSA offices utilize desk sharing, hot desking, and an open environment to support a flexible and mobile workforce
- GSA promotes employee flexibility by offering the full suite of possible alternative work schedules to its employees
  - Employees can work 9 or 10 hours each day to have three day weekends every other week or every week
  - Employees can take advantage of Flexitour to accommodate a range of arrival and departure times

Percent of respondents that are satisfied with telework and AWS policies by select agency



## Characteristics of Achieving and Maintaining Expected Flexibility

Invest in facilities and technology that support remote work and a flexible workforce

Offer the full range of federally allowed AWS to employees

Demonstrate the importance of flexibility to frontline managers



# Achieve Improved Geographic Flexibility

Agencies are improving flexibility by implementing policies and technology that allow employees to achieve their long-term career aspirations and their day-to-day objectives with greater geographic flexibility.

## Expanded Geographic Options

For many agencies, long-term career advancement may require employees to relocate to the Washington DC area. Many qualified candidates are unwilling to relocate. Agencies can improve flexibility by allowing employees to rise into national positions but remain in their home geography.

Consider...



- Struggled to fill openings within HQ in Washington DC
- Implemented the Alternate Duty Location (ADL) program, which allowed employees to apply for and serve in national positions from 26 different regional hubs across the US

*Significantly reduced*

*Employees reported*

***time to fill    reduced attrition***

*open positions*

## Mobile Technology

Over the past 25 years, government productivity has remained flat while productivity in the private sector has risen by more than 50%. Mobile technology has the potential to help close this gap by providing government employees with the tools to flexibly complete their missions from anywhere.

Consider...



### ***Miami-Dade County Foster Care Caseworkers***

- Case workers were struggling to keep up with an expanding case load, and had to return to their home office to complete documentation
- The county distributed camera-enabled smartphones and laptops to 2,300 caseworkers across the county

*Achieved*

*Mobile adoption may lead to a*

***30%***

***45%***

*increase in home visits*

*increase in caseworker productivity*

## Characteristics of Improved Geographic Flexibility

Improve career advancement options across all national geographies

Provide employees with technology that allows them to leave the office and directly engage with the public

Train employees to take advantage of emerging mobile technology

# Formal Training, Mentorship, and Collaboration Opportunities

Though no organizations have achieved transformative growth, some have maintained strong overall scores by investing in a dedicated office for training and developing their employees.

## Dedicated Training and Development Strategy

Organizations that have a dedicated office for training and development create a focus and priority on the skills and knowledge of employees at all levels and at all points in their careers.

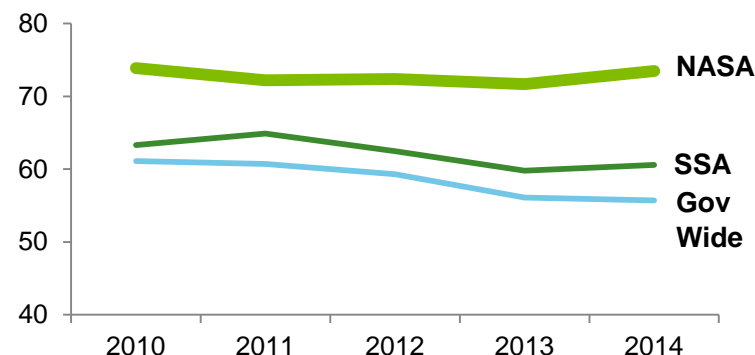
Consider...



**National Aeronautic and Space Administration**

- NASA's Training and Development Office focuses on:
  - Opportunities through **formal education, training, and on the job developmental experiences** (e.g., in class, online, on-site)
  - **Leadership development training** serving all NASA Centers, Mission Directorates, and Mission Support organizations
  - **Collaboration** across levels of the organization
  - **Effective technical knowledge capture and transfer** through the NESC Academy, an online tool
  - **Mentorship and fellowship** opportunities for employees

## Training and Development Trends



*In 2014, ranked*

**1**

for training and development out of 19 large agencies

“Employees and Supervisors are encouraged to assess training and development needs”  
- NASA Performance Management

## Characteristics of Dedicated Development and Training

Develop technology capability to offer trainings online and communicate development opportunities effectively

Analyze organizational needs and capabilities for knowledge transfer between employees

Develop programs and opportunities offered through a variety of channels to appeal to a broad employee base

# Peer to Peer Knowledge-Sharing

Organizations have employees who are interested in similar topics, in need of similar information, and willing to help others develop; some organizations have harnessed these employees' knowledge and shared it with other employees.

## Peer Training and Development Strategy

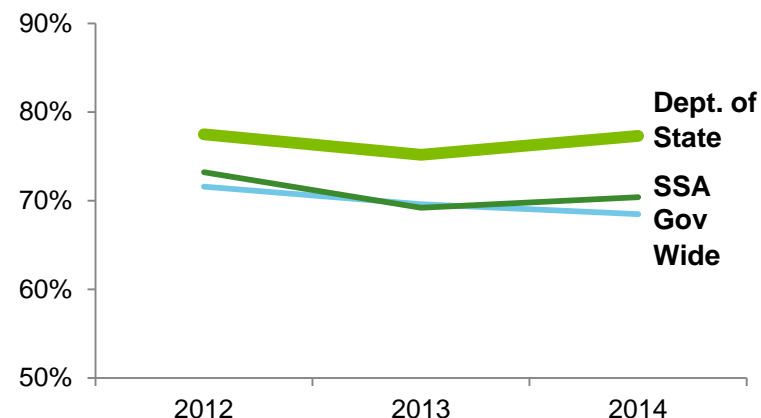
Organizations can be successful in addressing employee knowledge gaps by allowing employees to support training and development initiatives. Training and development can focus on specific groups of employees, or focus across the organization.

Consider...



- Department of State has maintained strong employee knowledge and skills through:
  - **Wide range of training topics**, which allows employees to pursue their personal and professional interests
  - **Formal mentorship program** that pairs civil service employees with experienced colleagues with similar professional interests
  - Flex Connect, an employee developed tool that **profiles employee skills** and helps employees match to short-term roles **to develop skills and diversity of experience**

Percent of Respondents that feel the workforce has necessary knowledge and skills



"There is a level of investment in all of our employees in a way that is more holistic than I have seen in other departments"

*Ray Limon*

*Director of the Office of Civil Service HR Management*

## Characteristics of Outreach and Relationship Development

Use technology systems to support employee connections and networking

Tailor initiatives to address different employee needs and groups

Consider informal methods of building and sharing knowledge across the organization

# Leadership Development

Organizations invest in training and developing their employees to provide customers with a consistent and quality experience and to ensure employees performing organization functions deliver accurately and consistently.

## Private Sector Knowledge Gaps

Organizations can successfully train and develop employees by evaluating employee's skills needs and providing high quality training from experts in the field. These organizations also invest in personal skills gap development through tuition reimbursement or partnerships with universities.

Consider...



- Blue Cross Blue Shield of Michigan faced transformational changes like national health care reform and addressed the resulting skills gaps, by:
  - Developing a Leadership Competency Framework to **build skills in employees in a new environment**
  - **Aligning strategic goals, performance reviews, and leader development with competencies** under three themes (Deliver Results, Lead People, and Build for the Future)
  - **Incorporating competencies into leadership training**
  - **Hosting webinars** for techniques for enhancing competencies

## Blue Cross Blue Shield of Michigan Training and Development Overview

- Number of:
  - Employees: 7,707
  - Fulltime trainers: 115
  - Part-time trainers: 5
  - Subject-Matter Experts: 158
- Education:
  - On-site degree programs from Michigan universities/colleges
  - Provided education, training, and development
  - Tuition reimbursement
  - Scholarship opportunities

*In 2015, ranked*

**5**

in Training Magazine's top  
125 awards

## Characteristics of Private Sector Employee Knowledge Gap Goals

Determine impacts of external regulations on workforce skill development and training needs

Expand reach and frequency of training and development communications through technology

Define information employees need to be successful in their jobs

# Tools for Effective decision-making

Some organizations have created clarity and simplification in their processes and policies and have made information readily available to their employees, so employees have the tools they need to make decisions.

## Clear and Simplified Rules

Agencies follow rules and regulations to make decisions when providing services. Some organizations have overcome the complexity and lack of clarity on how benefits decisions are made by simplifying associated rules and regulations.

Consider...



- Veterans filing claims for PTSD prior to a rule change needed to **meet specific medical diagnosis requirements** and may have needed a **claims adjudicator** to complete the benefits decision process
- The rule change **simplifies** the process and instead accepts a simpler doctors diagnosis to support claims without an adjudicator

*“VA’s new streamlined, science-based regulation allows for faster and more accurate decisions that also expedite access to medical care and other benefits for Veterans.”*

## Information Availability

Organizations equip employees with the proper information for decision-making so they are able to better serve customers or support the mission of the organization.

Consider...



- CFPB launched a program to **provide financial counseling services** to people in the workforce with disabilities to help **them make financial decisions**
- Although this is a new untested program, it **requires key information for employees** to make decisions including information that helps employees:
  - Determine which **resources customers** need based on their unique characteristics
  - **Assess financial current state** of customers

## Characteristics of Tools for Effective Decision-Making Goals

Consider organizational culture and environment when creating decision support tools

Identify beneficial training and technology that can assist in providing accurate and timely information

Determine triggers (e.g., customer complaints) and frequency for reviewing rules, policies, and procedures

# Decision-Making Documentation and Improvement

Leaders of organizations make decisions for the future of the organization and define the path forward. Some organizations adopted understanding the decisions their organization makes before making changes.

## Decision Knowledge First

Some organizations changed the way they look at simplifying processes. They first understand the key decisions the organization makes and needs to make, and then change processes to support making those key decisions.

Consider...



- In 2006, Ford's business was facing collapse, and leadership **determined and documented the critical decisions** necessary to turnaround the business
- Leadership **organized critical decisions** by step of the value chain and **outlined infrastructure for executing decisions effectively**
- **Progress was tracked weekly** and resulted in a series of organizational decisions
- Ford determined to accomplish the critical decisions a restructure of the organization was needed which **resulted in avoiding bankruptcy**

## Decision Types

- **“Big, one-off decisions that individually have a significant impact”**
  - For SSA this could be around partnering with other agencies
- **“Small, routine decisions that cumulatively have a significant impact”**
  - For SSA this could be guidance on field interactions with customer

## Characteristics of Organization Decision-Making Goals

Establish criteria for determining which decisions are critical to the organization

Define simple and clear roles for stakeholders in decision-making processes

Consider what components of the organization are impacted by critical decisions

# Continuous Improvement of Operations and Lean

Traditionally continuous improvement of operations have been thought to provide the most benefit to manufactures, but organizations in the service industry have also benefited from continuous improvement.

## Continuous Improvement in Government

Continuous improvement support working more effectively and efficiently by identifying and eliminating waste in processes. Continuous improvement helps to improve the quality, transparency, and speed of agencies' processes.

Consider...



### Environmental Protection Agency

- The EPA has integrated continuous improvement **across headquarters, regional offices, and state environmental agencies**
- Since 2003, Lean and Six Sigma methods (e.g., **value stream mapping and Kaizen events**) have been implemented across the EPA to evaluate and improve processes
- The EPA works to **help other agencies** to lean their operations and processes by **publishing toolkits on conducting Lean improvement events**

## State Agencies using Continuous Improvement

- EPA's Office of Water, EPA Region 7, and four states designed new processes to improve water quality standards and pollutant discharge processes, which reduced **process steps from 50 to 26, and reduced process time from a few years to several months**
- About 30 state environmental agencies using continuous improvement for permits **reduced administrative review times by 50%**
- EPA Region 6 decreased total processing time for Pesticide Enforcement Case Resolution **from 455 days to 216 days**

*EPA headquarters and regional offices:*

*Shortened process  
timeframes by up to*

**82%**

*Reduced number of  
process steps by*

**63%**

## Characteristics of Continuous Improvement Systems

Determine appropriate processes for continuous improvement efforts

Train and certify employees on lean processes to facilitate process improvement across the organization

Locate processes that are performed by multiple areas of the organization and should be done in a similar way



# Customer-Centric Infrastructure

Some organizations have adopted customer-centric goals as organization wide goals and have adapted their business processes and infrastructure to support a customer experience focus.

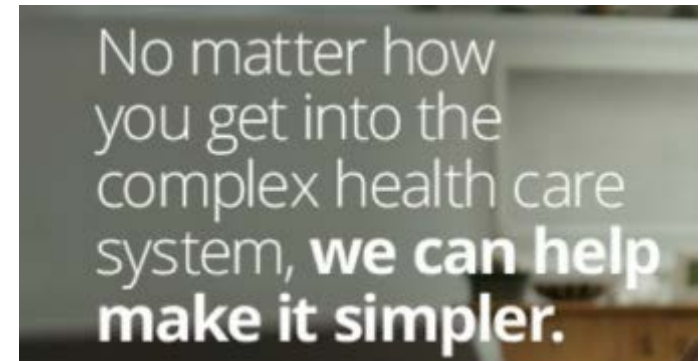
## Customer-Centric Organization

Customer-centric organizations invest in tools to better understand their customers, adapt infrastructure to support customer experiences, and create a customer-centric culture across all organizational levels.

Consider...



- United Healthcare **created a new position** of Vice President of Member Experience for Medicare and Retirement, which **cut across organizational lines** and allowed United Healthcare to make the following changes:
  - Invested in Member Journey Maps **to understand their customers** and **support employees** personalizing solutions
  - Gained leadership support and buy-in** across all functional areas of the organization through translating customer experience impacts into tangible organizational benefits
  - Engaged employees by providing **customer experience ownership and accountability** in their role
  - Aligned programs, products, and services** with customers needs



*“United Healthcare has created a better consumer experience by embedding the voice of our customers in our **culture** and **engaging employees** to listen to and understand our members on a more personal level. As a result, we’ve seen significant improvements, including a **decrease in customer complaints and calls to customer service.**”*

*- David Shapiro, VP Member Experience*

## Characteristics of Customer-Centric Infrastructure Goals

Focus on creating a customer-centric culture at all levels and across functions of the organization

Embed customer-centric goals into organizational priorities and strategies

Consider the customer journey through all channels and interaction types for programs



# Achieve Agile Development

Some federal government agencies has begun to embrace agile software development in an effort to reduce software development costs and risks.

## Agile Development

Agile software development prioritizes the rapid iterative development of functional code to the customer. It serves as a compelling alternative to traditional waterfall development by reducing long-term program risk and by prioritizing the creation of a functional product or service. However, switching to agile development is not without its challenges, as it differs significantly from waterfall.

Consider...



### Federal Bureau of Investigations

- From 2006 to late 2010 the FBI spent \$405 million developing a non-functional case management system using waterfall development
- In 2010 it switched to agile development, and brought the majority of development work in-house
- Following this change, the FBI significantly reduced monthly development costs, and managed to complete software development within one year, though hardware issues delayed final deployment

## GAO's Top 10 Agile Lessons Learned from 5 Agency Agile Implementations

1. **Start** with Agile guidance and an Agile adoption strategy.
2. **Enhance** migration to Agile concepts using Agile terms and examples.
3. **Continuously improve** Agile adoption at both project and organization levels.
4. **Seek** to identify and address impediments at the organization and project levels.
5. **Obtain** stakeholder/customer feedback frequently and closely.
6. **Empower** small, cross-functional teams.
7. **Include** requirements related to security and progress monitoring in your queue of unfinished work (backlog).
8. **Gain** trust by demonstrating value at the end of each iteration.
9. **Track** progress using tools and metrics.
10. **Track** progress daily and visibly.

## Characteristics of Agile Development

Don't just implement agile, make a concerted effort to *become* agile. Don't be afraid to deviate and be flexible

Realistically assess your readiness for agile development, and be sure to plan for roadblocks and setbacks

Prioritize the iterative creation of functional software over everything else

# Technology and Data Solutions

Although agencies have faced challenges in accurately measuring, tracking, and reducing improper payments, some have focused on technology and data to start to reduce improper payments.

## Technology and Data Focus

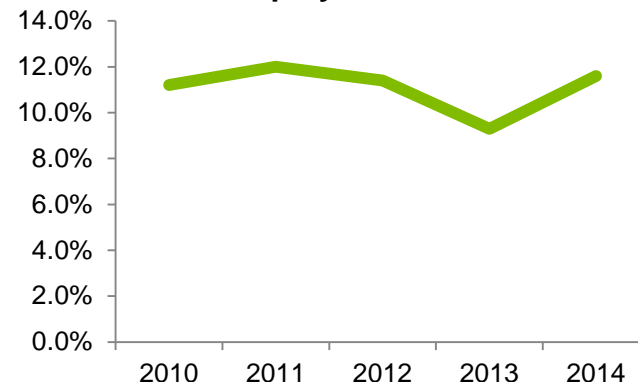
Agencies have worked to reduce the percentage of improper payments relative to all payments by developing and implementing strategies to improve data collection, integrate technology systems, and use analytics.

Consider...



- Although Department of Labor has not been able to reduce improper payments, but it has been able to not fall into the trend of increasing improper payments. This was accomplished through the following:
  - **Defined seven strategies** for reducing improper payments, including **three focused on technology and data exchange**
  - Defined **best practices** and shared across organization
  - Determined **root causes at the organization level and state level**
- All new efforts to reduce improper payments focus on data and systems:
  - **Designing pilot program to link systems and share data**
  - **Funding a Center of Excellence** to explore new data and technology to use for predictive analytics

## Improper Payment Rate Unemployment Insurance



*Most common causes for improper payments:*

**35%**

Continuing to make claims after returning to work

**24%**

Failure to meet state work search requirements

**19%**

Untimely or inaccurate separation info.

## Characteristics of Technology and Data Focused Goals

Investigate current technology and data capture methods for areas of improvement

Determine if some parts of the organization have lowered improper payment rates and document best practices

Focus communications on root causes and desired actions from stakeholder groups

# Process Evaluation and Redesign

Organizations have been able to reduce improper payments by evaluating the payment process and identifying areas for change and improvement.

## Process Evaluation and Redesign

Agencies have reduced improper payments by identifying main root causes as well as components of causes for improper payments. Agencies then change processes and policies associated with errors.

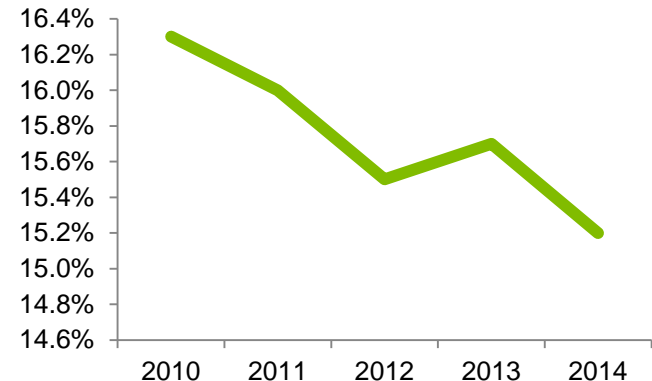
Consider...



**United States Department of Agriculture**

- Although overall program level improper payments remain high, USDA focused efforts on reducing aspects of improper payments for Child Nutrition Programs and achieved improvements through:
  - **Developed a study to track** improper payment rates and amounts
  - **Reduced burden of application and certification process** through implementing a Community Eligibility Provision
  - **Redesigned administrative review process**
  - **Partnered** with OPM to design a new prototype meal application
- Recent actions that focus on further reducing improper payments:
  - **Invested \$8.5 million** to improve operational and oversight efforts
  - Posed a **new rule** to help states target highest risk districts

## Improper Payment Rates National School Lunch Program



*Aggregations errors reduced from*

**3.8% to 0.8%**

in frequency for the lunch program over five years

*Aggregations errors reduced from*

**6% to 1.2%**

in frequency for the breakfast program over five years

## Characteristics of Process Evaluation and Redesign Goals

Consider stakeholders involved in improper payments and how training and technology can assist in reduction efforts

Adapt policies as needed to improve and simplify processes identified as causes or contributors to errors

Prioritize areas of focus for reducing types and components of errors

# Sophisticated Data Analytics

The Veteran's Health Administration has embraced the use of predictive analytics to help improve the quality of the healthcare it provides to patients.

## Analytics Excellence

Agencies can achieve analytics excellence by using tools like predictive statistics or machine learning to project what may occur in the future, and respond accordingly. This allows for both improved forecasting and proactive, rather than, reactive decision-making.

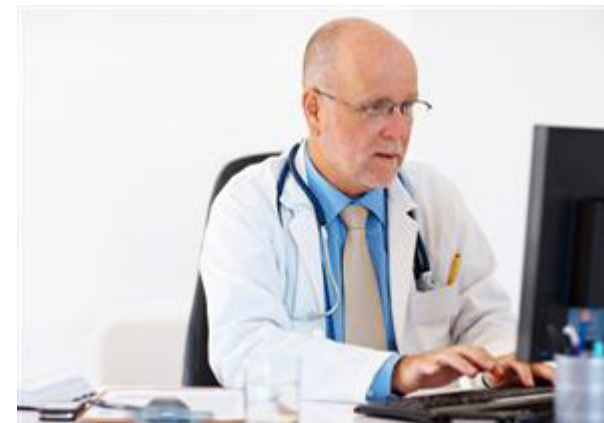
Consider...



- Developed the care assessment needs (CAN) score, a **weekly analytic that predicts the likelihood of patient hospitalization or death** within 90 days to a year
- Allows doctors to **proactively identify high-risk patients** and provide them with targeted interventions before they are hospitalized

*Reduced the mortality rate for targeted patients by*

**10%**



*Agencies that use advanced analytics should **ensure they have the proper skillsets and processes in place to help ensure success.** Many organizations are investing in **Data Scientists**, experts with advanced degrees in statistics, economics, or computer science.*

## Characteristics of Data Analytics Excellence

Explore using advanced statistics and machine learning to achieve data analytics excellence

Develop processes that incorporate data analytics into existing decision-making processes

Train or hire employees to create a workforce proficient in data analytics

# Achieving External Collaboration

Some organizations are improving the quality and breadth of data they have access to by sharing data and expertise with external organizations.

## External Collaboration

Organizations that seek to become data-driven don't always have access to all the data they need. When this occurs, they can pursue external partnerships. This may occur for single programs on an ad hoc basis or organizations may use fully integrated databases. Additionally, many organizations use these relationships to share talent and the skills of analytics personnel.

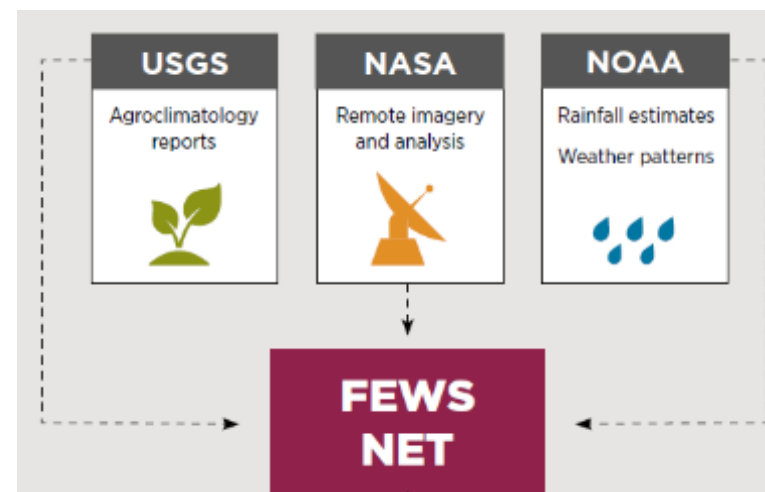
Consider...



- USAID wanted to **improve its ability to predict when and where famines could occur** across the world
- It **lacked the data and expertise** to accomplish this mission
- **Established inter-agency agreements** with USGS, NASA, and NOAA to acquire the necessary data and analysis for FEWS NET

*Guides the distribution of as much as*

**\$1.5b** *in food aid each year*



*"We focused very early on evidence and data and science," Eilerts said. "We didn't flail around. It was, 'How do we get data and information to say if there is a [food] access... problem.'"*

*-From Data to Decisions III, Partnership for Public Service*

## Characteristics of External Collaboration

Identify exactly what type of data you need before initiating inter-agency agreements to streamline the process

Consider partnering with multiple agencies if it improves the quality of data you have access to

Focus on building strong relationships between analysts at different agencies to improve the change of success

# Data Exchange Integration with Electronic Health Records

Some governments have integrated their systems directly with physician electronic health records, which facilitates the quick and secure transfer of medical information when making disability claim decisions.

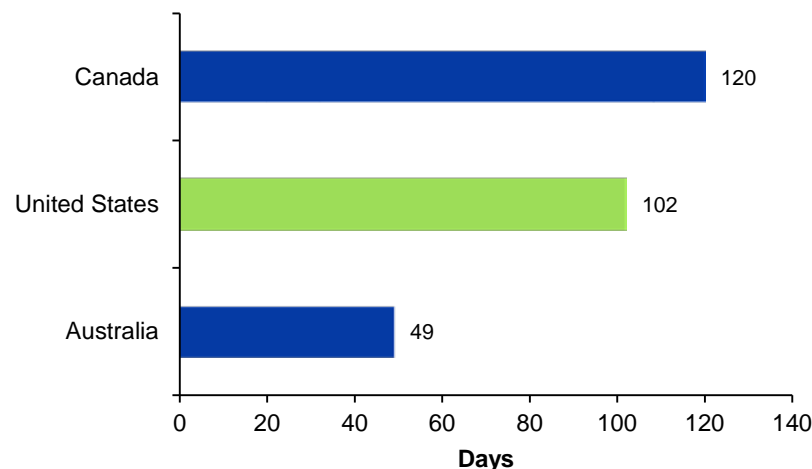
## Electronic Health Record Integration

Processing disability claims often requires evaluating the health records of an applicant. Often these records are submitted along with the initial application, but the evaluating agency may need to access additional records. By integrating with EHR databases, agencies can quickly acquire the necessary records.

Consider...



Approximate Disability Processing Times



Since 2010, Centrelink has had direct access to electronic medical files for all new claimants. This integration is made possible by Australia's national eHealth system. Additionally, it is important to remember that there are other factors that likely contribute to Australia's quick processing times. For example, Australia also implemented updated disability support pension processes in 2010 which included clearer disability guidelines for doctors and a dedicated physician team that supports complex claims.

## Characteristics of Integrating with Electronic Health Records

Integration may require a national EHR, though a piecemeal approach is potentially possible

Integration must be supported by appropriate processes to maximize processing time reduction

Integrating with EHRs is not a silver bullet, and countries can achieve improvements via clear guidelines and dedicated support teams



# Achieving Enterprise Data Integration

Some organizations are consolidating their databases and implementing improved naming, data, and metadata standards to improve their ability to make data-driven decisions.

## Data Integration

Data integration often requires new technology and processes to improve standardization and unification. This could involve anything from creating new data systems that integrate previously disparate data sets to enforcing standardized data coding and naming conventions.

Consider...

### A Large Financial Institution

- The organization was **struggling due to disparate databases and poor data quality** and had implemented several time consuming processes like paper-based reporting to work around integration issues
- The organization **revised and unified the standards for encoding financial data** to improve reporting
- They **overhauled their database structure** and implemented a new reporting application to take advantage of the newly unified databases

*Manages over*

**200 million**

*new records each day*

*Reduced reporting time by*

**60%**



By improving data integration, the organization was able to **design several new data reports and dashboards** for its executives. This helped the organization make **smarter data-driven decisions** at the executive level.

## Characteristics of Data Integration

Data integration is not just a technology challenge, new data conventions and standards are necessary for success

Don't integrate just to integrate. Have a specific business objective that integration supports

Be prepared for the significant challenges associated with IT system integration

# Achieving an Understanding of Cybersecurity Maturity

There are several cybersecurity maturity models that help organizations assess how coordinated and comprehensive their cybersecurity is. Organizations are using these models to understand the overall state of their cybersecurity.

## Cybersecurity Maturity

Cybersecurity is a complex, multifaceted challenge and addressing it requires organizations to have a deep understanding of their capabilities. Organizations can develop this understanding by assessing their cybersecurity practices against one of many existing cybersecurity maturity models.

Consider...



- In 2014 Intel wanted to better **understand its cybersecurity maturity**, so it launched a pilot program to assess its maturity with the National Institute of Standards and Technology's (NIST) Cyber Security Framework
- Using the framework, it **developed a unified understanding of its cybersecurity capabilities and gaps**

*Provided first ever*

*Allowed the creation of*

***cross-team new tools/dashboards***

*risk management strategy*

*for monitoring risk and maturity*

## Cybersecurity Maturity Models

There are several cybersecurity maturity models in existence. SSA should identify the model that works best for it, and then customize it further to meet its unique needs. Some models include:

- National Institute of Standards and Technology (NIST) Cybersecurity Framework
- NIST 800-53
- CERT
- Federal Information Security Management Act (FISMA)
- Control Objectives for Information and Related Technology (COBIT) 4.1
- Information Technology Infrastructure Library (ITIL) V3 2011
- SANS Top 20

## Characteristics of Transformative Employee Engagement Goals

Adapt the identified maturity model to account for specific organizational concerns/risks

Assess across the organization and build a common understanding of security strengths and weaknesses

Identify risk areas and develop remediation plans accordingly, be sure to reassess often, given rapid evolution of cyber threats



# Achieving Adaptive Risk Management

Some organizations are improving their ability mitigate cyber risk by implementing processes that drive continual cyber security improvement and adaption.

## Adaptive Risk Management

Organizations can mitigate cyber risks by implementing iterative processes that continually review the threat landscape and adjust cyber defenses accordingly. These processes are often integrated into cyber security maturity models, but they go beyond these frameworks by proscribing processes for continual improvement.

Consider...



### U.S. Department of State

- The State Department implemented an automated and dynamic scorecard that constantly assessed risk across the organization
- Scores constantly changed as new threats and vulnerabilities emerged, and stakeholders across the organization addressed emerging risks

*Reduced measured risk by*

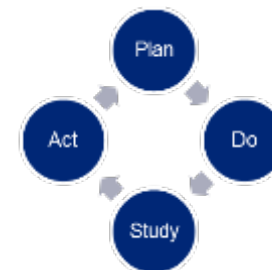
**94%**

*following implementation*

*Program owner was promoted to oversee*

### DHS' National Cybersecurity

*There are many ways to implement adaptive risk management processes. Some organizations use **information security management systems (ISMS)**. ISMS' differentiate themselves by incorporating continual improvement processes like PDSA:*



- **Plan:** Objectives, predictions, plan the who, what, where, when of the cycle
- **Do:** Carry out plan and document the results
- **Study:** Analyze data and results of execution
- **Act:** Address the changes that need to be made based on studies

## Characteristics of Adaptive Risk Management

User iterative assessments and improvement processes to adapt to the evolving threat landscape

Tie improvement processes to a rigorous cybersecurity maturity model

Automate reporting as much as possible given technology and system restraints

# Achieving Reduced System Risk

Some organizations are reducing their system risk by applying tough new guidelines and overhauling their network security technology and policy structure.

## Reduced System Risk

Organizations are reducing their system risk by implementing new technologies and modern network architecture philosophies. When thoughtfully executed, these changes can improve security for the organization and its customers.

Consider...



### U.S. Department of Health and Human Services (HHS)

- HHS has developed a disparate patchwork of siloed network security solutions that both wasted resources and failed to provide adequate security
- In response, HHS centralized and unified its network security software and hardware and created a single cybersecurity clearinghouse
- They implemented dozens of new technologies and managed to complete the entire transformation within one year

*Network security monitors*

**10 billion**

*logs per week*

*Identifies*

**3-4**

*suspicious network events each day*

## Other Network Architectures

There are many ways to reduce system risk by improving network architecture. For example Forrester proposes a **Zero Trust** model for network security. This model abandons the idea of a “trusted” internal network. Moving towards this model requires that organizations:

1. Identify their most “toxic” data
2. Document the precise flow of their data through their network
3. Develop “micro perimeters” around toxic data to improve security
4. Implement new rules/access logic for micro perimeters
5. Monitor their new zero trust ecosystem

*This is one example of an alternative network architecture that reduces system risk.*

## Characteristics of Reduced System Risk

Ensure network and technology changes align to the broader system security strategy

Identify the specific network architecture and technology that meets mission needs

Don't neglect the cultural and people components of system risk

# Management of the Medical Examination Process

Some governments deploy their own physicians to manage the medical examination process. This helps expedite the medical evaluation process and reduces the probability of fraudulent claims.

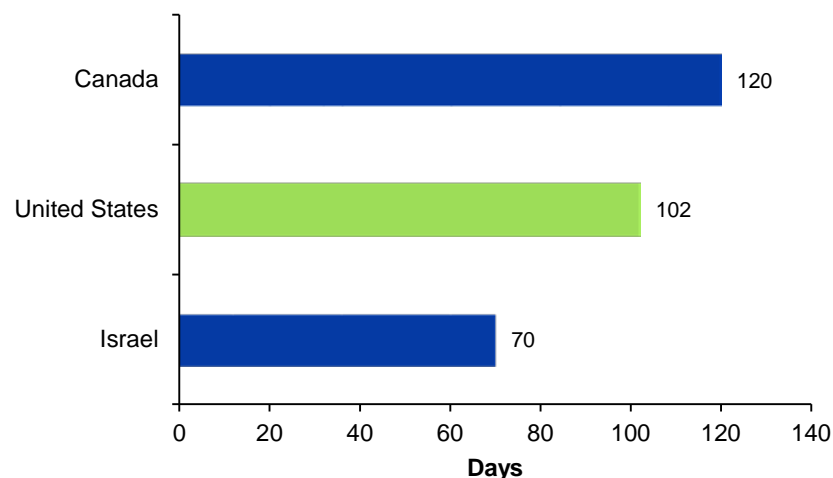
## Medical Examination Process

Some countries contract or appoint physicians directly to administer the medical examination/assessments necessary to determine whether an applicant is eligible for disability. Though this process is more resource intensive, it has the potential to significantly reduce disability processing times. Additionally, it helps ensure that fraudulent claims are not approved and processed.

Consider...



Approximate Disability Processing Times



During the first phase of assessment, a physician appointed by the National Insurance Institute (NII) examines the patient and determines their medical disability percentage. These physicians can then coordinate with the local NII branch, which is electronically integrated with central NII computes, to provide the necessary information to the claims officer that makes the final determination. As the physicians are appointed by NII, there is a significantly lower chance that they will improperly complete an application, which would require follow-up investigation.

## Characteristics of Managing the Medical Examination Process

Appoint trusted physicians to directly administer the necessary examinations and tests

Provide the infrastructure necessary to allow local physicians to submit their findings quickly and securely

Integrate the software systems of all local offices with the central office

# Achieving Integration with Electronic Health Records

Some governments have integrated their systems directly with physician electronic health records, which facilitates the quick and secure transfer of medical information.

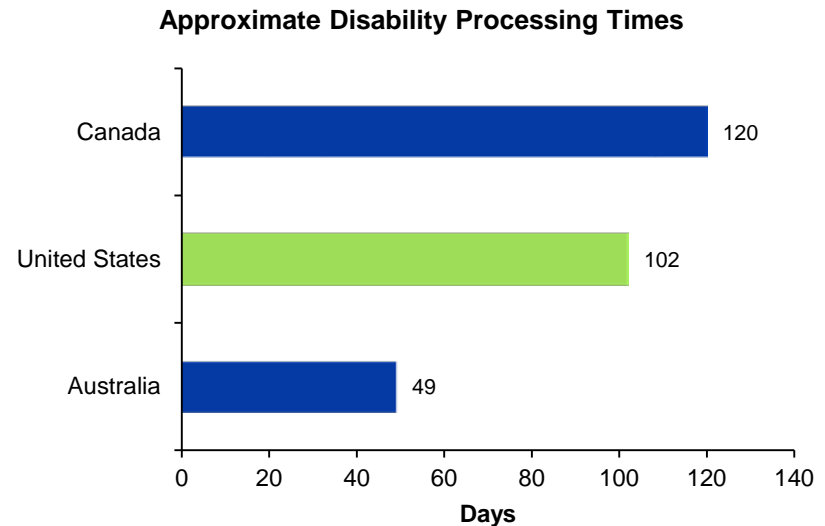
## Electronic Health Record Integration

Some organizations have begun to integrate their systems with electronic health records to improve operations. Integration has the most significant impact on disability claim processing time, but can improve any process dependent on medical information.

Consider...



- In 2010, Centrelink integrated its systems with citizen's electronic medical files
- Integration is made possible with Australia's national eHealth system
- Australia has one of the quickest disability claims processing times in the world, despite having one of the highest disability rates among comparable countries
- Other factors likely contribute to its processing speed



Approximately **5.3%** of working age population eligible for disability

Approximately **53** fewer days required for processing compared to US

## Characteristics of Integrating with Electronic Health Records

Integration may require a national EHR, though a piecemeal approach is potentially possible

Focus on major electronic health records (e.g., DoD) if pursuing a piecemeal approach

Integration must be supported by processes that take advantage of seamless access to data (e.g., physician for complex cases)

# Transformational Leadership to Drive Engagement

Transformational leaders can help the agency break new ground. Revised performance metrics and a culture that supports innovation are critical enablers for supporting and growing transformational leaders. As part of the effort to improve service to veterans through increased employee engagement, Veteran's Affairs (VA) is developing its leaders to champion the change and own the results.

## Transformational Leadership

The Secretary of Veteran's Affairs aims to improve customer service for veterans through the increased engagement of employees and improved VA culture.

The Federal Employee Viewpoint Survey and VA All Employee Survey showed agency leaders' scores are actually lagging behind other organizational metrics. They have room for improvement.

Leaders were made accountable for improving employee engagement within their purview, aligned to the President's Management Agenda and OPM guidelines.



## Transformational Leadership Strategies

- Engage leaders as teachers to demonstrate the behaviors necessary to move the organization toward the desired future state
- Focus on leader performance and building a leader performance scorecard to hold executives accountable for the change
- Equip leadership with an Employee Engagement Playbook to support their ability to meet performance goals
- Communicate progress of changes and improvements to all levels of the organization – use a communications cascade to push messaging through managers to front line staff

## Characteristics of Transformational Leadership Strategies

Incentivize transformational leadership by building desired behaviors in to performance metrics for executives

Provide tools and information necessary to support leaders as they lead transformational change

Elevate leadership to teach and guide behavioral changes through their own example

# Field Engagement and Empowerment

Organizations recognize that to efforts to promote employee engagement and empower employees need to occur across organization and at all level. Organizations with geographically disperse operations need to focus heavily on the field staff.

## Empower The Field

Citizenship and Immigration Services (CIS) empowered front line staff to solve their own problems through local office pilots, communities of practice, regional innovation challenges, and creative incentives.

The Director of CIS wanted to tackle the problems that staff were facing in the field to increase the engagement of CIS employees. Most of the CIS staff adjudicate benefits, evaluate benefits, and determine an action, similar to SSA. The workforce believed in the mission, but they were very production driven and they felt that production got in the way of quality.



**U.S. Citizenship  
and Immigration  
Services**

## Empowerment Strategies

- Discussed staff challenges with the Director of CIS and prioritized recommendations (based on LOE and impact).
- Director agreed to own the change himself. He also recognized that the change needed to be owned by the front line staff.
- Director engaged the Unions right away to create guidelines and to align interests.
- CIS conducted six different pilots in the field to test solutions to common staff problems.
- Established a steering committee to govern the pilots and engage local leaders.
- Fostered innovation challenges so employees could come up with ideas to solve any problem they wanted.
- Incentivized staff with creative, low-cost rewards (e.g., Area Directors would personally call and thank an outstanding employee).

## Characteristics of Field Empowerment Strategies

Identify an executive sponsor to champion the effort

Proactively leverage Union relationships to align organizational interests

Support innovation at the front line level, empowering employees to solve their own issues

# Customer-Centric Management Structure

Some agencies have invested in new organizational capabilities to champion transformation and drive accountability to the top.

## Customer-Centric Culture

Some organizations have implemented strategic management that works to connect distinct silos or groups with-in the organization and overcome barriers to collaboration and integration. This management structure can exist to overcome a specific organization-wide problem or to continually develop solutions..

Consider...



- The Veterans Administration (VA) wanted to **improve its services to customers** through an experience office
- Embedded Employee Experience capability within Veteran's Experience
- The VA **hired outside leaders** with experience in standing up customer experience capability
- Conducted Learning Tours with Luminary companies known as **leading edge in customer experience**
- **Increased focus on data analysis** for common understanding
- Developed both outcome and "**early warning**" **indicators** for proactive customer services

## Veteran's Experience Office Functions

1. **Access and Integration** – Build, deploy, and maintain the processes and technology needed for a seamless customer experience
2. **Insight and Design** – Orchestrate customer touch points based on a consistent, shared understanding of their needs
3. **Navigation and Advocacy** – Oversee and enhance touch points with our customers, ensuring they can understand and easily access VA benefits and services
4. **Performance Management and Measurement** – Assess performance from the perspective of customers
5. **Operations and Governance** – Enforce standards of performance informed by the customer's point of view

## Characteristics of Customer-Centric Culture

Integration of customer focus across organization groups/silos/components

Use of data analytics for proof points of changes accomplished

Lead change with the right talent from inside or outside of the organization

## B.2 Trends



# Customer Trends Summary

***Customers expectations are changing to include:***

1

**Flexible and Seamless:** multiple service channels and seamless service delivery across channels

2

**Transparent:** greater visibility into and understanding of service delivery

3

**Self-Service:** access to simple self-service options

4

**Customized:** service delivery customized to individual preferences and needs

5

**Instantaneous:** rapid or instant service delivery

6

**Courteous:** consistently helpful, pleasant, and efficient experiences with employees

# Customer Trends Relevant to SSA

The following trends are important to consider as SSA decides how ambitious it wants to be in improving customer satisfaction. For each trend, consider how it may factor into your goals.

	Trends	Examples
1	Every single company on Forrester's "Most Improved" CXi list for 2014 launched or re-launched a <b>digital experience</b> in the last eighteen months. This suggests that improving an organizations digital experience may be a key component of improved customer satisfaction.	An insurance company actively collected customer feedback regarding their member portal and used it to <b>overhaul their entire web experience</b> . They managed to improve their CXi score by 20 points from 2013 to 2014.
2	Organizations with a brick and mortar footprint are <b>redesigning their physical spaces</b> to improve customer satisfaction. Traditional changes like this may not be as new or exciting as implementing digital experiences, but they can have a significant impact on customer satisfaction.	Over the course of the past few years, a bank has updated many of its branches and ATMs to <b>improve their aesthetics and customer ergonomics</b> . They improved their CXi score by 12 points from 2013 to 2014.
3	Organizations are <b>overhauling the processes of their frontline employees</b> to improve the customer experience. This requires understanding how the customer interacts with the existing process, where pain points are, creating new processes that remove these pain points, and training employees accordingly.	An organization now instructs its field techs to examine their customer's entire systems even when they visit for a specific problem. This allows them to <b>catch problems before they arise and proactively address customer concerns</b> . They improved their CXi score by 14 points from 2013 to 2014.
4	When addressing customer satisfaction challenges, companies are starting to <b>dig deeper to treat the disease rather than the symptom</b> . The visible pain point for a customer may not be directly tied to what needs to change to address it.	An organization tried to improve its store experience by training its frontline staff. However, they weren't making headway. They <b>dug deeper and discovered that regional managers weren't rated on customer satisfaction</b> . Therefore, these managers didn't hold stores accountable for improvement.

# Customer Trends Relevant to SSA

The following trends are important to consider as SSA decides how ambitious it wants to be in expanding channel services. For each trend, consider how it may factor into your goals.

	Trends	Examples
5	In a 2014 Forrester survey, <b>web-based self-service</b> surpassed the use of the voice channel for the first time as the most widely used communication channel for customer service. Forester predicts in 2015 that customers will continue to <b>demand effortless interactions over web and mobile self-service</b> channels.	Multiple cable and internet providers offer self installation for high speed internet services, eliminating the need for scheduling a technician to set up the equipment and providing instant access to internet. An organizations high speed internet service <b>supports self installation through step by step processes</b> and the ability to contact support if needed.
6	Companies are exploring expanding capabilities in existing channels. For example, some are exploring <b>expanding mobile channel capabilities through voice assistants and video chat</b> with screen sharing and annotation.	A bank has an online <b>technical support function for commercial business services that enables a representative to view a customer's desktop</b> and trouble-shoot the issue with the customer. Online customer experience is ranked higher than in person customer service for People's United Bank.
7	Organizations with brick and mortar locations are using channel integration to enable <b>strategic partnerships with complimentary service providers</b> to improve customer experience and minimize customers trips to additional physical locations.	An insurance company offers Auto Repair Xpress, which is a service that <b>partners with car repair locations</b> , to have customer who filed a claim, schedule an inspection online and go to the Xpress location where the car will be inspected and work will be completed. Customers rated this service as 4.6 out of 5 stars, and 93% would recommend this service to a friend.
8	Organizations are using <b>social media</b> as a tool to expand and integrate channels. This allows them to engage with customers to improve customer satisfaction and collect customer data.	An organization uses social media to engage with customers who mention them in online posts, and works to resolve issues for customers. They <b>respond to customer posts within the hour</b> with relevant information.

# Customer Trends Relevant to SSA

The following trends are important to consider as SSA decides how ambitious it wants to be in tailoring customer service. For each trend, consider how it may factor into your goals.

	Trends	Examples
9	Companies are going beyond reactive engagement with customers to exploring <b>individual proactive customer engagement</b> , which can include providing support and content to customers before it is requested. This enables customers to successfully complete interactions and make decisions.	A bank ATM uses <b>customers' transaction history to individualize the interface</b> . By taking into consideration the customer's personal information and context, proactive experiences go beyond meeting basic needs by tailoring experiences to each customer.
10	Companies are reevaluating the technology systems they use to enable tailored customer experiences. Some have begun to shift from only using closed source technologies to <b>open platform providers</b> , enabling them to better understand, tailor, and scale interactions with their diverse customer base.	In 2013, and insurance company selected ForgeRock to support their online customer portal initiative, which through an open platform enables agile and scalable customer interactions. This platform <b>allowed customers to easily see their individual policy information all in one place</b> , and enabled scalability while customer policy counts increased to over 22 million.
11	Organizations are going beyond traditional methods of demographic segmentation and are <b>analyzing customer behavior</b> to divide their customer base into segments. This provides an understanding of individual customer behavior to create segments and tailor customer service.	An organization has begun to <b>segment customers based on behavior and developed a system for interacting with and rewarding the segment of their customers that are active on social media</b> and are generating customer referrals. They received 331,500 online referrals in the first three months of this change.
12	Organizations are <b>defining key performance indicators</b> for tailored service. They are <b>tracking performance through customer behavior data</b> to be responsive to customer needs and adapt tailored services to the individual customer or segment of customers.	An organization simplifies thermostat setup and reduces domestic energy consumption by <b>monitoring and measuring customer's daily activity, and creates a personalized schedule to maximize cost savings and comfort</b> . On average, customers cut heating and cooling bills by 20% through this measurement and tailored service.

**Sources:** <http://customerthink.com/forresters-top-trends-for-customer-service-in-2015/>; <http://www.forgerock.com/en-us/about-us/press-releases/geico-selects-forgerock-support-online-customer/#en-us/about-us/press-releases/geico-selects-forgerock-support-online-customer/>; <http://www.clickz.com/clickz/news/2350371/24-hour-fitness-uses-social-to-win-new-members>; <http://www.techrepublic.com/blog/big-data-analytics/measure-actual-customer-behavior-using-big-data-analytics/>

# Customer Trends Relevant to SSA

The following trends are important to consider as SSA decides how ambitious it wants to be in cutting disability processing times. For each trend, consider how it may factor into your goals. For the majority of these trends, the United States is already a leader.

	Trends	Examples
13	Some countries have historically used a series of programs to administer their disability insurance safety net. Some countries are moving away from this model, and are deploying unified national disability insurance programs to improve the consistency of service. However, these are challenging transformations, and it is not uncommon for countries to encounter difficulties as programs are rolled out.	<b>Australia</b> is currently rolling out the National Disability Insurance Scheme to select populations across Australia, and will complete the launch by July 2016. The initial evaluation report on the rollout of the scheme is due for release in July of 2015.
14	Some countries are moving toward an electronic case management system similar to that employed by the United States. As countries deploy these systems, some of them are using it as an opportunity to integrate other technology improvements into their system. For example, some countries are using these system overhaul opportunities to integrate electronic health records into their evaluation process.	<b>Israel</b> is currently rolling out <i>Tevel</i> , a system that will allow citizens to file disability claims via the internet, supports and coordinates simultaneous work by staff on claims, and integrates with the EHRs of the various sickness insurance funds (similar to HMOs) that exist across Israel.
15	Like the United States, some countries are deploying fast track processes to expedite the claims of citizens that are manifestly disabled. By creating fast track lanes, governments can reduce the workload for its evaluators while getting the most disabled citizens the help they need more quickly.	The <b>United Kingdom</b> has various fast track lanes for its varied disability insurance programs. At the outset of the process, claimants identify whether they are applying under a relevant fast track provision. After doing so, their case is reviewed by the government within 24 hours. This allows the UK to process fast track claims in an average of 6.1 days.

# Employee Trends Summary

## *Employee expectations are changing to include:*

1

**Ownership:** authority and resources to implement impactful changes in their job and working environment

2

**Informed Feedback:** frequent, clear, and actionable feedback from managers

3

**Mission Connection:** see and understand how their day-to-day job impacts the organization's mission

4

**Learning Opportunities:** opportunities to learn and improve their skills, and to apply those skills in their day-to-day job

5

**Flexibility:** tools to complete their mission when and where it is most impactful; work-life balance

6

**Loyalty:** connection and engagement with their work resulting in greater willingness to stay at their organization

# Employee Trends Relevant to SSA

The following trends are important to consider as SSA decides how ambitious it wants to be in improving employee engagement. For each trend, consider how it may factor into your goals.

	Trends	Examples
1	Organizations that improved their employee engagement used <b>multiple communication channels</b> to disseminate messaging and <b>provided opportunities to collect and incorporate employee feedback</b> .	In 2008, the <b>Department of Transportation</b> had a relatively low employee engagement score. DOT managers regularly <b>held town halls, visited field offices frequently, and implemented employee ideas for improving the agency</b> that they received through an online suggestion tool, IdeaHub. Agency <b>leaders wanted employees to know that they valued their feedback</b> . DOT improved 10 spots in ranking, and improved from the fifth quintile to the fourth in employee engagement index
2	Although organizations have stated that there is not a known one-size-fits-all approach for improving employee engagement across an organization, GAO has analyzed employee engagement data across agencies and <b>identified six key drivers for employee engagement</b> . These drivers are <b>a good starting point and should be customized</b> to organization's needs.	GAO analysis indicates that six practices were <b>key drivers higher levels of employee engagement</b> : <ul style="list-style-type: none"> <li>▪ Constructive performance conversations</li> <li>▪ Career development and training opportunities</li> <li>▪ Work-life balance</li> <li>▪ Inclusive work environment</li> <li>▪ Employee involvement</li> <li>▪ Communication from management</li> </ul> These drivers are a starting point for improving and sustaining employee engagement
3	Employee engagement has been described as <b>removing the barriers</b> that prevent employees from <b>providing input</b> and that prevent employee input from <b>making positive changes</b> to the organization.	Agencies have removed employee engagement barriers in many different forms including: <ul style="list-style-type: none"> <li>▪ <b>Adjusting organizational culture</b> to an open environment</li> <li>▪ <b>Improving communications</b> from leadership</li> <li>▪ Creating development and connection opportunities for <b>all levels of employees</b></li> </ul>



# Employee Trends Relevant to SSA

The following trends are important to consider as SSA decides how ambitious it wants to be in improving employee engagement. For each trend, consider how it may factor into your goals.

	Trends	Examples
4	Some organizations are moving beyond annual employee satisfaction surveys and <b>embracing tools that allow them to measure employee satisfaction as closely as they measure customer satisfaction.</b>	When an organization rolled out a series of initiatives focused on improving employee engagement, it knew it couldn't rely on the annual survey anymore. It deployed a <b>tool that allowed the collection of real-time employee feedback</b> so it could better monitor the impact of its initiatives.
5	Some organizations believe that “culture eats strategy for breakfast” and have focused the efforts of senior leaders accordingly. When <b>senior leaders focus on employee engagement</b> , employees throughout the organization may take it more seriously.	An organization recognized that engagement starts at the top, and <b>incorporated senior leaders from across the organization into engagement efforts.</b> These leaders were held accountable for engagement results within their part of the organization.
6	Some organizations have begun to focus engagement efforts on “millennials” given their growing presence in the workforce. Though not entirely different, <b>millennials have different engagement drivers than previous generations</b> , and particularly value purpose, mission, and work-life integration.	Organizations can better serve millennial employees by performing the <b>research necessary to understand what drives the subset of millennials attracted to their organization</b> , and implementing changes based on those findings.
7	Some organizations are beginning to <b>provide employees with more consistent and frequent feedback.</b> This has the dual benefit of helping employees improve more quickly and improving employee engagement.	An organization implemented a new <b>mandate that required managers to have frequent growth and development conversations with employees</b> to encourage engagement. They provided extra training for managers to help equip them for these new conversations.








# Employee Trends Relevant to SSA

The following trends are important to consider as SSA decides how ambitious it wants to be in improving employee recruitment and hiring. For each trend, consider how it may factor into your goals.

	Trends	Examples
8	Some organizations have begun to <b>move beyond the resume and interview</b> when assessing candidates. They seek to put candidates in hands-on situations where they can test and demonstrate the skills essential to success on the job. This may take the form of anything from excel analytics tests, to drafting responses to customer complaints, to participating in hackathons.	An organization uses hands-on hackathons not only to test applicants but also to promote brand awareness. Groups of <b>candidates are given a sample challenge that represents typical work performed by employees</b> , and then must work together to address it. The quality of their response is assessed as a part of the application process.
9	Some organizations have begun to <b>assess soft skills like emotional intelligence through novel interview methods</b> . For example, candidates may meet recruiters in a more casual environment, and will be assessed on their emotional intelligence and interpersonal skills. These types of assessments supplement, but do not replace traditional interviews.	An organization <b>hosts casual “happy hours” at the outset of its recruiting process</b> and uses these opportunities to assess candidates. These happy hours are the first step in a revised and shortened interview process, and organization saves \$2 million dollars for every 100 candidates hired in this way.
10	Some organizations are <b>experimenting with asynchronous interviews to increase convenience for candidates</b> while relieving some of the burden placed on hiring teams. During asynchronous interviews, candidates are given standard questions and their responses are recorded by phone or computer. Reviewers can then review their responses at a later date. This has the added benefit of improving fairness by allowing side by side interview comparisons.	An organization could use <b>asynchronous interviewing as an early step in the interview process</b> . Though it lacks the back and forth of a traditional interview, it improves standardization while increasing convenience.

# Employee Trends Relevant to SSA

Empowering employees requires a series of organizational changes, and no single organization has all the answers. Therefore, this slide provides a series of examples for how private sector companies empower employees.

	Trends	Case Study
11	<b>Employees are tangibly connected to the service strategy.</b> Senior leaders have taken the steps necessary to listen to employees and have implemented changes that allow employees to live the service strategy.	 <p>Yum! Brands CEO David Novak has authorized all employees to spend up to \$10 to address customer problems, so they can tangibly execute the service strategy.</p>
12	<b>Employees have the confidence and tools to personally address challenges</b> for internal and external customers. This doesn't require a complex methodology or teaching curriculum, a shared thought process for addressing challenges can be sufficient.	 <p>Ritz Carlton trains all employees on the MR BIV framework, which helps them personally address mistakes, reworks, breakdowns, inefficiencies, and variations.</p>
13	<b>Frontline employees can experiment</b> , as they have the most direct insight into service breakdowns and opportunities for improvement. Frontline leaders know how to design simple experiments regarding how to improve processes and service.	 <p>Facebook hosts employee hackathons. Facebook video, which has garnered billions of views, was created by an experimenting employee at one such hackathon.</p>
14	<b>The frontline is less hierarchical</b> , which gives employees the opportunity to put their skills to use. Organizations have achieved this by putting in the <i>frequent and deliberate</i> effort necessary to overcome traditional assumptions regarding authority.	 <p>Mayo Clinic gives nurses the ability to escalate concerns past doctors directly to specialists when they fear for the patients safety. Mayo Clinic was recently declared the safest teaching hospital in the country.</p>
15	<b>The organization invests in service employees.</b> The organization prioritizes training and hiring of low level service employees, sometimes even over the training of senior executives.	 <p>Zappos invests significant resources in hiring and training it's service personnel. A basic \$13/hour service employee will often receive 15 interviews for the job and receive weeks of training before ever working a full day.</p>

# Employee Trends Relevant to SSA

The following trends are important to consider as SSA decides how ambitious it wants to be in improving employee empowerment. For each trend, consider how it may factor into your goals.

	Trends	Examples
16	Some organizations are explicitly altering employee assessment paradigms to promote improved employee flexibility. These changes <b>emphasize results and deemphasize traditional metrics like hours worked</b> and face-time in an office environment. By only emphasizing the final outcome, employees have improved flexibility for getting the job done.	An organization introduced a “results only” evaluation process for its employees and supplemented it with concrete guidelines regarding remote and mobile work. After doing this, the organization saw an <b>increase in productivity and engagement</b> .
17	Some organizations are working to <b>digitize paper-based processes</b> to improve employee flexibility. When all work can be performed digitally, it is easier for employees to work when and where meets their needs.	The <b>Belgian Social Security Administration</b> assessed current work processes and the paperwork associated with them. They then began a concerted effort to digitize as much paperwork as possible to promote flexible work.
18	Some organizations are acquiring and deploying <b>software that supports flexible work</b> and promotes remote collaboration. This may include chat software, virtual conferencing software, and knowledge management software.	An organization acquired <b>instant messaging and desktop communication software</b> to promote flexible collaboration. They also acquired a <b>knowledge management platform</b> and implemented a mentoring system to promote its use.
19	Some organizations are providing employees with <b>flexibility regarding the hardware they use</b> . This not only provides the employee with improved choice, but also it can reduce operating costs.	An organization implemented a <b>bring-your-own-device policy</b> that allowed employees to augment issued technology with personal technology. This initiative was <b>complemented with improved security policies</b> like PINs and remote wipe capability.

# Employee Trends Relevant to SSA

The following trends are important to consider as SSA decides how ambitious it wants to be in improving employee knowledge. For each trend, consider how it may factor into your goals.

	Trends	Examples
20	Some organizations are acquiring or building <b>learning technology that is closely integrated with service technology</b> . Rather than sequestering learning modules in an isolated part of an organization intranet, learning modules are integrated directly with the technology employees use to execute their daily mission. This improves the integration of learning and work.	An organization built a platform based on salesforce.com that gives their sales representatives detailed learnings and information during each phase of the sales process. This allows <b>employees to learn more seamlessly</b> as they execute the sales process. This type of technology could be easily integrated into a customer service process as well.
21	Some organizations are <b>using cross-functional teams to develop and execute trainings</b> , rather than relying on just an isolated training team or outside trainers. This not only helps to align trainings more closely with business objectives, but helps to build a culture of knowledge and learning across the organization as everyone chips in.	An organization has it's <b>client engagement teams</b> identify training objectives, a dedicated <b>course development team</b> creates the trainings, and <b>peer and business leaders</b> deliver the trainings to their fellow employees. Content is blended and makes use of online and instructor led training.
22	Some organizations are <b>establishing formalized mentorship programs</b> to help develop employees. Often these programs target a subset of employees, such as those identified as having future leadership potential. However, others are open to all potential participants.	An organization established a mentorship program based around an <b>online system where employees detail what they know and what they want to learn</b> . Employees can then find mentor/mentee matches to further their development. 1,700 employees (10% of the organization) actively participate in the program and 88% of mentees and 74% of mentors believe it is effective.

# Employee Trends Relevant to SSA

The following trends are important to consider as SSA decides how ambitious it wants to be in improving employee knowledge. For each trend, consider how it may factor into your goals.

	Trends	Examples
23	Some organizations are <b>going beyond the traditional lecture based format</b> to make learning and development more effective and interesting for participants. Ne formats are often hands-on, and sometimes produce tangible products for the organization.	An organization has begun to use <b>multi-day high stress simulations, real-time/simulated product data, and prototyping events</b> to promote learning and development.
24	Some organizations are beginning to recognize the <b>importance of unified employee development programs</b> that support them from their first day on the front lines to their service as senior leaders.	An organization rolled out a refined and expanded training and <b>development program for its over 4,500 first and second line leaders.</b>
25	Some organizations have recognized how complex and hectic the modern work environment has become. In response to this they have <b>implemented a series of initiatives and changes that seek to simplify the work experience.</b> This has two principal benefits: it allows the organization to operate more efficiently by removing unnecessary processes/meetings/requirements, and it provides employees with increased flexibility in how they use their time.	An organization first implemented a series of <b>lean initiatives explicitly focused on simplifying the work done by its employees.</b> It then reinforced these changes by promoting a new culture that encouraged simplicity and speed in its operations and day-to-day execution.

# Employee Trends Relevant to SSA

The following trends are important to consider as SSA decides how ambitious it wants to be in improving employee knowledge. For each trend, consider how it may factor into your goals.

	Trends	Examples
26	<p>Some organizations are <b>making a concerted effort to become irresistible to current and future employees</b>. They do this by providing meaningful work, constructive hands-on management, a positive work environment, exciting growth opportunities, and trusted leadership. Additionally, they strive to make the work environment simple by removing bureaucratic overhead.</p>	<p>Google has become a simply irresistible organization by implementing a range of employee engagement policies. For example, it's <b>20% time</b> allows employees to perform meaningful and intrinsically rewarding work. Additionally, it closely monitors what makes a good manager, and constantly adjusts training and manager evaluations accordingly. It creates a positive/humane work environment by providing benefits like free food, yoga classes, and more.</p>
27	<p>Some organizations are <b>overhauling and simplifying their performance management process</b>. Traditional performance management processes can consume million of man hours per year. In response, some organizations are significantly reducing the number of questions asked and factors evaluated. In conjunction with this effort, these organizations are working hard to make sure they ask the right questions. This often involved a focus on asking managers what they would <i>do</i> with their employees, rather than what they <i>think</i> about their employees.</p>	<p>Deloitte is considering radically simplifying its performance management process to focus on four simple questions:</p> <ol style="list-style-type: none"> <li>1. Given what I know of this person's performance, and if it were my money, I would award this person the highest possible compensation increase and bonus</li> <li>2. Given what I know of this person's performance, I would always want him or her on my team</li> <li>3. This person is at risk for low performance</li> <li>4. This person is ready for promotion today</li> </ol> <p>This change has the potential to save Deloitte millions of man hours each year without adversely impacting the evaluation process.</p>

# Organization Trends Summary

***Threats and opportunities are impacting organizations to include:***

1

**Decision Support:** access to smart software that supports human decision-making processes with advice, analysis, and automation

2

**Big Data:** generating and capturing massive quantities of data that can be analyzed and visualized to inform decision-making

3

**Collaboration:** have the opportunity to pursue external partnerships to supplement their internal capabilities and reduce costs

4

**Cyber Threats:** facing ever-evolving cyber threats requiring strengthened security and readiness for inevitable intrusions

5

**Flat Hierarchy:** addressing inflexible/slow org structure by reducing hierarchy to promote efficiency, engagement, and effectiveness



# Organization Trends relevant to SSA

The following trends are important to consider as SSA decides how ambitious it wants to be in improving efficiency of operations. For each trend, consider how it may factor into your goals.

	Trends	Examples
1	Some organizations are <b>using technology transformation to achieve superior customer experience</b> by creating more detailed segmentations of customers, providing services across channels, and gathering analytical insights to tailor services.	An insurance company analyzed data about policy holders to proactively notify them of flood claim guidance and provide instructions for hotels after a major widespread flood. This allowed the insurance company to have an <b>efficient claims process and deliver an improved level of customer service</b> than would have been available without advanced technology capabilities.
2	Using technology to capture customer feedback can make it easier to <b>integrate customer feedback in operations</b> . This can improve customer experiences, identify possible efficiencies in service delivery, and help guide service delivery decisions.	Federal cross-agency priorities include improving customer experience, and <b>technology can help in the collection and integration of customer feedback</b> to attain that goal. While private companies may integrate customer feedback to retain customers, agencies do this to better serve the public and fulfill their missions. The <b>Dept. of Veteran's Affairs</b> created a customer feedback mechanism that links feedback to employee signature blocks and enables HRC payroll to <b>identify opportunities for improvement</b> .
3	Organizations <b>make strategic partnerships</b> to increase <b>operational efficiencies</b> , better <b>reach customers</b> , and develop additional service delivery options beyond physical office locations.	As agencies have faced increased pressure to consolidate space and continue to create value to customers, some have begun to <b>make strategic partnerships to reach customers and develop organizational efficiencies</b> . An example is a partnership between the <b>U.S. Coast Guard, Army Corps of Engineers, and Dept. of Transportation</b> , which launched a new partnership to improve operational efficiency for reviews of new transportation projects by <b>synchronizing their review process</b> .



# Organization Trends relevant to SSA

The following trends are important to consider as SSA decides how ambitious it wants to be in improving improper payments. For each trend, consider how it may factor into your goals.

	Trends	Examples
4	<p><b>Improper payments have been a focus for over a decade.</b> There have been three main acts passed including the Improper Payments Information Act of 2002, Improper Payments Elimination and Recovery Act of 2010, and Improper Payments Elimination and Recovery Improvement Act of 2012. FY14 had one of the highest rates of improper payments, <b>exceeding the previous record from FY09 by 1.4 percentage points.</b></p>	<p>GAO cites <b>multiple challenges</b> with reducing improper payments including:</p> <ul style="list-style-type: none"> <li>▪ <b>Estimating improper payments</b> in an accurate way</li> <li>▪ <b>Creating risk assessments</b> for programs and payments</li> <li>▪ <b>Reworking policies</b> that require legislative approval</li> <li>▪ <b>Determining root causes</b> of improper payments</li> </ul>
5	<p>Improper payments are a complex challenge and organizations have <b>collaborated to share information</b> that is mutually beneficial in efforts to reduce improper payments.</p>	<p><b>Departments have worked together as well as government-wide initiatives</b> including the Do Not Pay Initiative. Do Not Pay was implemented to provide <b>centralized web-based data matching</b> to help prevent certain kinds of improper payments.</p>
6	<p>Although there is <b>no one-size-fits-all solution</b> to improper payments and agencies may have different causes of improper payments, <b>there are some identified strategies</b> to support reducing improper payments.</p>	<p>Examples of strategies that can help reduce improper payments include:</p> <ul style="list-style-type: none"> <li>▪ <b>Analyze root causes</b> to develop corrective actions</li> <li>▪ <b>Start with the three error categories</b> required by OMB (documentation and administrative, authentication, and verification), and <b>create detailed analysis as needed</b></li> <li>▪ Design and implement <b>preventive controls</b> through data-sharing, predictive analytic tests, and training programs</li> <li>▪ Implement <b>effective detection techniques</b>, such as data mining and recovery audits</li> </ul>

# Organization Trends relevant to SSA

The following trends are important to consider as SSA decides how ambitious it wants to be in improving data-driven decisions. For each trend, consider how it may factor into your goals.

	Trends	Examples
7	Develop data to <b>determine the return on investment for analytics programs</b> . Data analytics is a part of the business, just like anything else. Demonstrating ROI can improve a program's longevity and help organizations understand when they need to adjust how they're doing data analytics.	An organization may run ROI analyses on its data analytics programs, and determine that the benefit data analytics brings to small investments doesn't justify the costs. They may then reserve robust data analytics for their most significant investments.
8	<b>Don't neglect data visualization</b> . Most employees and executives won't have the background knowledge or understanding to grapple directly with analyses. Providing them with clear dashboards and compelling visualizations can help improve the impact of data analysis.	An organization may establish a series of executive dashboards with clear visualizations for its executives. This allows executives to quickly understand where the organization stands and make decisions accordingly.
9	Encourage data use and spark insights by <b>enabling employees to easily see, combine and analyze data</b> . Don't hide analytics tools away in a corner of the organization. Get everyone involved if possible, and solicit their feedback on existing tools and processes.	An organization may provide all employees with access to its centralized database and licenses for basic analytic and visualization tools.
10	Data-driven analysis is only as good as the data it's based on, so it's critical to demonstrate the connection between the efforts of those that collect data and the end product it informs. <b>Make sure those who collect data see the results of the analyses so their dedication for quality collection doesn't fade.</b>	An organization may publish a monthly report for its data collection employees that demonstrates the benefits the data they collect is having on the organization and the customers they serve.

# Organization Trends relevant to SSA

The following trends are important to consider as SSA decides how ambitious it wants to be in improving employee engagement. For each trend, consider how it may factor into your goals.

	Trends	Examples
11	It's not a matter of "if" an organization will experience a security breach but "when". <b>Defensive technology can't adapt to emerging threats as quickly as they evolve.</b> Therefore, organizations are adopting risk-based system security strategies.	Instead of focusing all resources on preventing security events, an organization will <b>deploy some resources to develop mitigation and response strategies</b> for inevitable security breaches.
12	Some organizations are <b>dedicating increased resources to system security</b> . In 2012, only 26% of chief information security officers reported to the CEO. By 2015, that number increased to 33%. In response to this increased exposure, security employees are working harder to frame security issues in language that business owners understand.	An organization can give system security the central importance it warrants by <b>creating a chief information security officer that reports directly to the CEO</b> . In turn, it's important that security employees demonstrate the business impact of their efforts.
13	Some organizations are beginning to recognize that <b>people are often the weakest link in their defense</b> . They are responding by winning the hearts and minds of their employees and encouraging a truly cyber-risk, aware culture.	An organization can use <b>brief and humorous communications to help encourage improved cyber security</b> amongst average employees. They understand that long legal agreements and typical communications don't change employee behavior.
14	Some organizations are recognizing the <b>growing lag time between incidents and the response</b> . For financial services organizations, 88% of attacks are successful in less than one day, but only 21% are discovered within 24 hours. In response, organizations are <b>deploying automated security analytics platforms</b> that can monitor security quickly, tirelessly, and twenty four hours a day.	An organization could take the necessary steps to <b>standardize its software and network</b> , and once it has completed this step <b>implement automation and analytics tools</b> to improve monitoring and intrusion detection.

# Organization Trends relevant to SSA

The following trends are important to consider as SSA decides how ambitious it wants to be in improving effective decision-making. For each trend, consider how it may factor into your goals.

	Trends	Examples
15	For large strategic decisions some organizations have explored a <b>decision quality process</b> , which defines high-quality <b>decisions as those that will create the most value</b> . Organizations define what this value means in the context of their environment.	Organizations have made strategic decision by using the following decision quality process: <ul style="list-style-type: none"> <li>▪ <b>Appropriate frame</b> - understand problem and goal</li> <li>▪ <b>Creative and feasible alternatives</b> - choose most value</li> <li>▪ <b>Meaningful information</b> - is accurate and unbiased</li> <li>▪ <b>Clarity about desired outcomes</b> - describe end state and impacts on organization</li> <li>▪ <b>Solid reasoning and sound logic</b> - consider relevant information including unknowns</li> <li>▪ <b>Commitment to action by all stakeholders</b> - support effective implementation of decisions</li> </ul>
16	Some large organizations <b>are using data as a tool</b> to make decisions. Data tools include <b>visualizing large amounts of data</b> in a user friendly way to support decisions.	Organizations that support decision-making by adopting data visualization use the insights in a variety of ways. Some examples of supporting decision-making with data include incorporating <b>real-time insights on operations</b> and segmenting customers.
17	Some organizations are going <b>beyond rules, policy, and procedure simplification and are moving towards a larger work simplification</b> . Work simplification includes simplifying roles, environments, technology, and other organizational elements in addition to simplifying processes and policies.	An organization implemented the concept of work simplification by implementing the initiatives below: <ul style="list-style-type: none"> <li>▪ <b>Lean management</b> – reduced layers and duplication</li> <li>▪ <b>Holistic program</b> – improved speed and customer input</li> <li>▪ <b>Cultural changes</b> – reduced complexity of culture</li> <li>▪ <b>Performance management</b> – reduced complexity for decisions on employee performance</li> </ul>

**Sources:** <https://hbr.org/2015/05/an-organization-wide-approach-to-good-decision-making>; <http://www.fusioncharts.com/whitepapers/downloads/>

## B.3 Maturity Models and Measures Used in Case Studies

# Employee Knowledge Gaps and Knowledge-Sharing

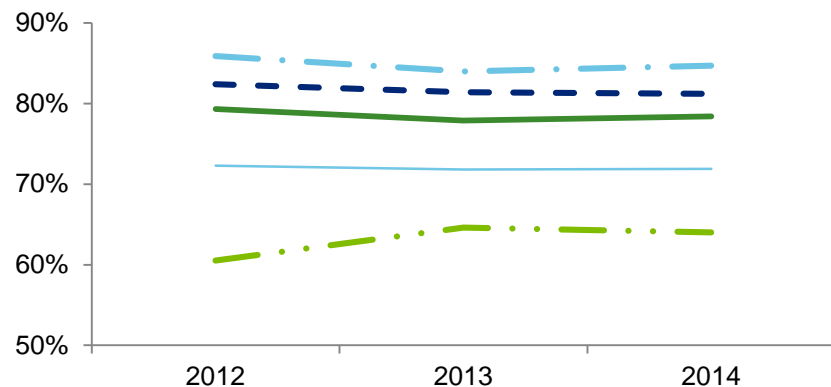
Two questions in the survey address employee knowledge at an organization.

## Federal Viewpoint Knowledge Gap Questions

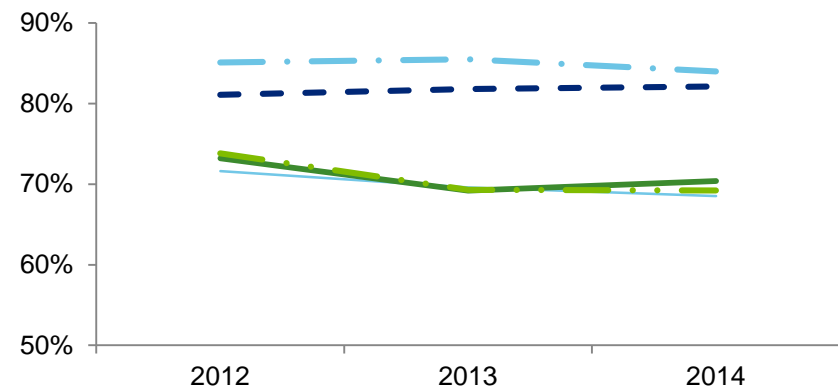
**Job Knowledge-Sharing** - Question 26 “Employees in my work unit share job knowledge with each other”

**Right Knowledge** - Question 29 “The workforce has the job–relevant knowledge and skills necessary to accomplish organizational goals.”

Percent of Respondents “Agreeing” with Question 26



Percent of Respondents “Agreeing” with Question 29



### Key Takeaways

- Satisfaction with knowledge-sharing is higher both government wide and for SSA than satisfaction with the workforce having the job-relevant knowledge and skills necessary to accomplish organizational goals
- Agencies, departments, and the government-wide responses have not had much volatility over the past three years
- SAA is better than the government-wide average for Job Knowledge-Sharing and similar to the average for Right Knowledge

# Federal Best Places to Work - Strategic Management

The Federal Best Places to Work assessment examines the quality of an agency's strategic management, which includes their ability to recruit and hire employees with the right skillset.

## Strategic Management

**Knowledge and Skills:** "The workforce has the job-relevant knowledge and skills necessary to accomplish organizational goals."

**Recruiting:** "My work unit is able to recruit people with the right skills."

**Development:** "The skill level in my work unit has improved in the past year."

**Measurement:** "Managers review and evaluate the organization's progress toward meeting its goals and objectives."

**We extracted and focused on data specific to this topic for the research in this section of the presentation.**

## Why Best Places to Work?

### Vs. Time to Fill Open Positions Data

- While time to fill data provides insight into how efficient a recruiting process is, it doesn't effectively measure quality of candidate.
- Best Places to Work provides data regarding candidate quality, and is therefore a better measurement for understanding recruiting as it aligns to SSA goals.

### Vs. Chief HC Officer's Managers' Satisfaction Survey

- OPM measures recruiting effectiveness with the Chief Human Capital Officer's Managers' Satisfaction Survey.
- This survey has more questions dedicated to recruiting, but unfortunately data is not publically available.
- Therefore, FEVS data was used for benchmarking, but SSA should consider using Human Capital Officer's Managers' Satisfaction Survey data for internal measurement.

# Employee Knowledge Gaps and Training and Development

The Best Places to Work category of Training and Development measures the extent to which employees believe they are able to do their jobs effectively and improve skills from appropriate trainings based on assessed development needs.

## Training and Development Questions

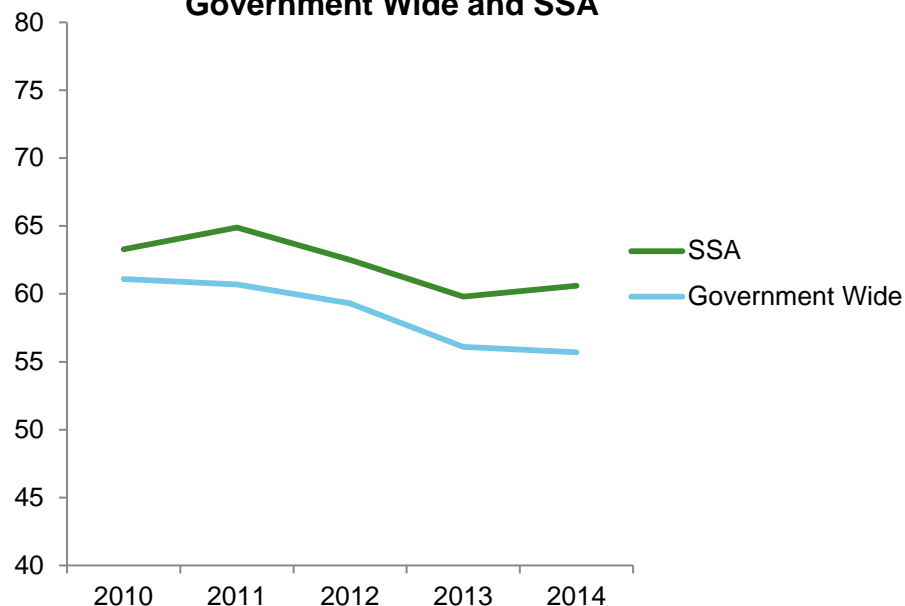
**Skill Improvement** - "I am given a real opportunity to improve my skills in my organization"

**Information Availability** - "I have enough information to do my job well"

**Needs Assessment** - "My training needs are assessed"

**Training Satisfaction** - "How satisfied are you with the training you receive for your present job"

## Training and Development for Government Wide and SSA



## Key Takeaways

- Government-wide satisfaction and SSA have followed a similar trend over the past four years
- SSA made improvements from 2013 to 2014, but scores are still below the 2011 peak
- SSA had the steepest decline in scores between 2011 and 2013
- Government-wide scores had the steepest decline between 2012 and 2013



# Continuous Improvement of Operations Maturity Outline

There are several ways to become an organization focused on continuous improvement (CI) of operations. There are five main phases for maturity of CI operations and five distinct areas to consider when progressing in maturity.

	Start using CI	Evaluate how CI is working	Expand Proven Successes	Whole Organization uses CI	CI is Crucial Part of Culture
Strategy	Select projects that can be quick wins and develop and in a single area of organization	Use CI as a problem solving method and expand to more areas of org.	Begin aligning projects with organization priorities and expand to more org. areas	Align most projects with org. priorities and expand to all org. areas	Link all projects to strategic priorities and integrate CI into culture of all org. areas
Projects	Track project level metrics	Begin creating project length, savings, and tools targets	Begin tracking org. wide metrics including impact and refine targets	Reduce project length, increase savings and tools, aggregate impact, and track org. metrics	Drives value of business, further reduces project length, further increases savings and tools
Resources	Conscript participants and provide no alumni resources	Have interest based participation, mixed alumni satisfaction, and basic acknowledgement for participation	Recruit participants with a formal process, have positive alumni experience, and provide communal recognition	Recruit top candidates, have strongly positive alumni experience, and provide multiple modes of recognition.	Recruit future leaders, have transformative alumni experience, and have systematic recognition
Training	Invest in some outside resources to train project leaders	Invest in external training for leaders and staff, and identify internal project coaches	Invest in full scope of external CI training and improve coach quality	Provide sub-MBB LSS training internally and have dedicated MBB coaches	Provide MBB LSS training internally and have MBB coaches for all CI projects
Culture	Don't use continuous improvement and engage with CI sporadically	Use but face resistance for continuous improvement and engage with CI at the project level	Use CI and develop a broad awareness of CI principals across org	Embrace continual improvement and lean across the organization	Always pursue CI at all levels and integrate CI into org DNA

*This is not a full or comprehensive maturity model for becoming an organization focused on CI, but it does touch on the most relevant parts for SSA's Vision 2025.*

# Overall Improper Payments

OMB designates programs as “high-error programs” if they exceed a certain threshold for improper payments in a given year. SSA had two programs designated as high-error in 2014.

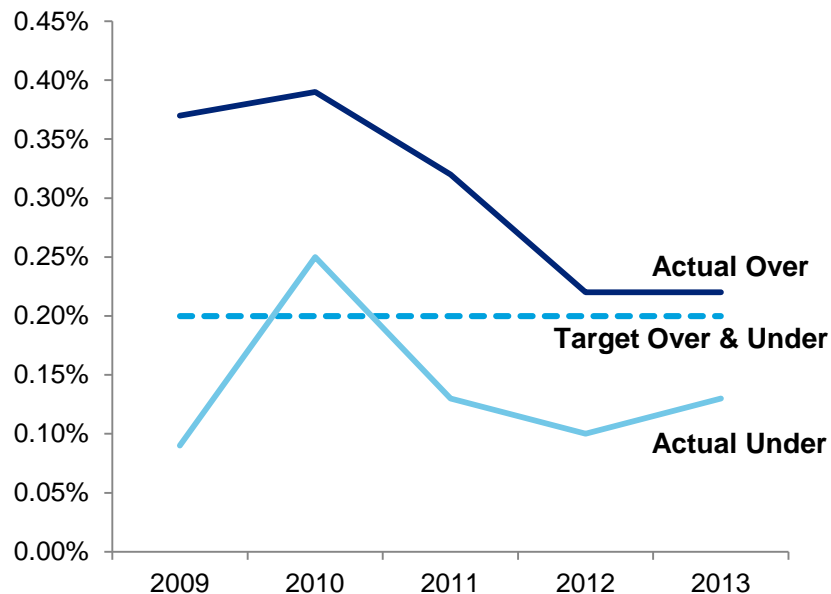
Program	Agency	Total Payments (outlays)	Improper Payment Amounts*	Improper Payment Rates
<b>Retirement, Survivors, and Disability Insurance (RSDI)</b>	<b>SSA</b>	<b>\$824.2B</b>	<b>\$3.0B</b>	<b>0.4%</b>
Pell Grants	Dept. of Ed	\$31.6B	\$0.7B	2.2%
Supplemental Nutrition Assistance Program (SNAP)	USDA	\$76.1B	\$2.4B	3.2%
Rental Housing Assistance Programs	HUD	\$31.7B	\$1.0B	3.2%
Medicare Prescription Drug Benefit (Part D)	DHHS	\$58.5B	\$1.9B	3.3%
Children's Health Insurance Program (CHIP)	DHHS	\$9.5B	\$0.6B	6.5%
Medicaid	DHHS	\$261.6B	\$17.5B	6.7%
Medicare Advantage (Part C)	DHHS	\$135.5B	\$12.2B	9.0%
<b>Supplemental Security Income (SSI)</b>	<b>SSA</b>	<b>\$55.4B</b>	<b>\$5.1B</b>	<b>9.2%</b>
Unemployment Insurance (UI)	Dept. of Labor	\$48.4B	\$5.6B	11.6%
Medicare Fee-for-Service	DHHS	\$360.2B	\$45.8B	12.7%
National School Lunch Program (NSLP)	USDA	\$11.5B	\$1.7B	15.2%
Earned Income Tax Credit (EITC)	Dept. of the Treasury	\$65.2B	\$17.7B	27.1%

\* Includes overpayments and underpayments

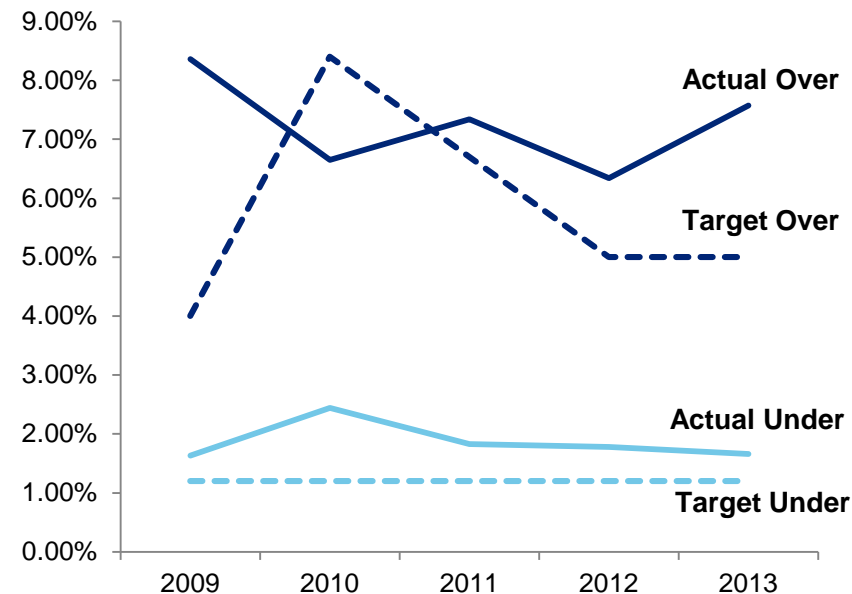
# SSA Improper Payments Trends

SSA sets targets for improper payments each year for Retirement, Survivors, and Disability Insurance (RSDI) and Supplemental Security Income (SSI). These targets are set at a percentage of total payments for each of the programs.

## RSDI Percent Over and Underpayments



## SSI Percent of Over and Underpayments



### Key Takeaways

- **RSDI** has achieved the target level for underpayments since 2011, however, has not achieved the overpayments target in five years
- **SSI** has not achieved the target level for underpayments in five years, and has not achieved the target for overpayments in 3 years
  - Targets for SSI fluctuate more for overpayments than all targets for SSI and RSI
  - SSI overpayments have had the most volatile changes over time

# Data-Driven Maturity Outline

There are several ways to become a more data-driven organization. Due to this, there isn't a single axis of improvement, but rather a series of axes that measure the overall data-driven maturity of an organization.

		Basic	Intermediate	Advanced
Analytics Sophistication		<b>Reactive and Proactive Reporting:</b> Operational reporting for measurement, compliance, and benchmarking.	<b>Strategic Analytics:</b> Segmentation and statistical analysis to understand root causes and inform actionable solutions.	<b>Predictive Analytics:</b> Development of predictive statistical or machine learning models to guide all decision-making.
Data Integration	Internal	<b>Disparate:</b> Several standalone databases, different file formats, different naming conventions, unstructured data	<b>Semi-Unified:</b> Different file formats, standing naming conventions, fewer databases, emergence of metadata	<b>Unified:</b> Few or a single database, well defined metadata, defined data lifecycle, Hadoop or NoSQL databases
	External	<b>Program Specific:</b> Share data as necessary for specific programs and initiatives	<b>Mission Specific:</b> Have the standing agreements and technology to continually share data at the component or mission level.	<b>Full Integration:</b> Full sharing of data between participant organizations.
Adoption		<b>Program Specific:</b> Data-driven decisions occur on an ad hoc basis, and only occur when program/initiative owners decide to use data extensively	<b>Office-Specific:</b> Some offices or components have adopted data-driven processes, across all programs and initiatives within their purview.	<b>Enterprise:</b> All decisions at all levels of the organization across all offices incorporate data as appropriate.

*This is not a full or comprehensive maturity model for becoming a data-driven organization, but it does touch on the most relevant parts for SSA's Vision 2025. Other things to consider are the data expertise of your workforce, data governance, and infrastructure.*

# Appendix C:

# Stakeholder

# Input

# Superior Customer Experience Feedback

The following provides feedback from stakeholders\* that support recommended strategic initiatives by Vision Objective



## Consolidated Customer Experience Management

- **Working Session Feedback:** “Development of more centralized sources”
- **Manager Survey:** “(Create) Predictive service based on notice of people’s life events; reaching out and letting customers know how an event can affect their Social Security being proactive; sharing of info across agencies”
- **Working Session Feedback:** “Make software for analysts and data specialists more available”
- **Manager Survey:** “Move to a customer-centric view that includes a real customer profile for each client versus our current claims based view”
- **Pre-launch Outreach:** “Understand different customer segments and their needs”



## Customer Empowerment and Choice

- **Manager Survey:** “To improve customer experience, employees suggested improved letters for claimants unable to use online services. Letters need to be in plain language and provide specific information.”
- **Public Survey:** “But we have yet to achieve the capability of providing specific Asian language notices for target populations and educational/community outreach of SSA programs in AAPI languages. For example, crucial hearing notices at the ALJ level are either in English or Spanish and are not available in other languages.”
- **Manager Survey:** “Develop multi-language, particularly Spanish, online services and publications. Today most of our efforts are in English and our public needs Spanish information available”
- **Employee Survey:** “Put on Town Hall meeting in local neighborhoods, churches, and schools to gather ideas and keep folks informed”
- **Manager Survey:** “Ramp up the public affairs staff to increase contact with the community.”
- **Pre-launch Outreach:** “Believe more stakeholder investigation of the public needs to be done to understand customer demands and finalize strategic planning”
- **Manager Survey:** “New methods of service tailored to the wants of the customer”



## Omni-Channel Customer Experience

- **Manager Survey:** “Keep improving the internet paths to help walk the visitors to right choices and decisions”
- **Pre-Launch Outreach:** “Integrate application systems so customers don’t have to provide the same information to multiple people when filling out forms”
- **Working Group Feedback:** “(Create) seamless connectivity amongst different components”

# Exceptional Employee Feedback

The following provides feedback from stakeholders that support recommended strategic initiatives by Vision Objective



## Employee Engagement

- **SSA Interviews:** “FEVS (employee survey) guides a lot of employee plans, but the survey itself does not have attributable data to determine what drives changes”
- **Vision 2025 Employee Survey:** “Use employees’ knowledge in a way that impacts SSA in a positive way”
- **Vision 2025 Employee Survey:** “Allow organized time to meet & provide a platform to provide ideas”
- **Vision 2025 Employee Survey:** “Truly listen to the thoughts/ideas of employees and create a meaningful relationship between employees and management”
- **Regional Working Groups Feedback:** “The sense of accomplishment and empowerment when employees are equipped to service their customers/ given the tools to provide superior customer service”



## Employee Development

- **Pre-launch Outreach:** “Establish a career path for employees and provide development support. Support and offer your employees’ career growth”
- **Pre-launch Outreach:** “Expand a results-oriented performance measurement system”
- **Working Session Feedback:** “Streamline and standardize development programs (ODP, IDP, Gear program). There should be standards in these programs so that if I'm a SR or CR, there is a path to get to next step”
- **Working Session Feedback:** “Need a vehicle to capture what specific job-related training employees need”
- **Working Session Feedback:** “Improve materials worked with (to make) more dynamic ways to present information, but make it a more enjoyable, engaging experience... make people look forward to training because it's so meaningful”
- **Working Group Session Feedback:** “There's a lot of value in learning from other components, getting experience with working with customers, etc.”
- **IdeaScale:** “(Create) a community based intra-wiki site for social security employees that encompasses any and all topics related to our work”
- **Alexandria District Office RWS Summary:** Want to see a competency model developed and trainings mapped to the model

# Exceptional Employee Feedback

The following provides feedback from stakeholders that support recommended strategic initiatives by Vision Objective



## Employee Empowerment

- **IdeaScale:** “In addition to/ aside from telework, allow employees who are not responsible for serving the public directly on the frontlines to work out of the closest SSA office/ facility. Doing this will not only assist the employee but also would save the agency in transit subsidies and provide a happier more productive employee.”
- **Employee Survey:** “1) Couple flextime, flexible schedules with flexible locations for performing the work. 2) Empower employees to determine where it’s best (for them) to perform the work and when.”
- **Pre-Launch Outreach:** “Need to make the government accessible from a recruiting standpoint (it shouldn’t take 8 months to get hired...)”
- **Employee Survey:** “We can also work on implementing scenarios that help employees through... most common asked questions and responses and clicking on that response and giving us the feed back on where to go next, sort of like the Alien tree or Decision tree”
- **Employee Survey:** “Currently there are several tools, websites, shortcuts, decision trees, etc. but there is not a centralized location to find everything”
- **Manager Survey:** “Empower employees; create a place where employees take steps to promote themselves and take advantage of available resources”
- **Working Group Session Feedback:** “Remove jurisdictional barriers- if you get the claim and you know how to process it just do it!”



# Innovative Organization Feedback

The following provides feedback from stakeholders that support recommended strategic initiatives by Vision Objective



## Continuous Improvement

- **Public Survey:** “The process to submit suggestions for programs is not a user friendly process. How can we challenge the status quo and remove initiatives that are not aligned with the agency strategic direction if we cannot easily submit suggestions? I hope the new Vision will allow a quick submission process when we identify solutions and want to share our suggestions.”
- **IdeaScale:** “Increase the number of data exchanges between government agencies, from State to Federal and vice versa from Federal to State...”
- **Pre-launch Outreach:** “Establish informal private partnerships (e.g., hospitals, non profits) to better assist with complex cases”
- **Pre-Launch Outreach:** “Restructure programs to enable data mining and run program”
- **Manager Survey:** “Recruit recent graduates with analytical skills”



## Adaptive Culture

- **Working Session Feedback:** “We have to listen to employees, encourage out-of-the-box thinking for what can change as opposed to what can’t, such as regs., increase inter-component communication, tell employees the “why” behind decisions, let employees know we heard them”
- **Working Session Feedback:** “Do we have to bless something 500 times? Or can we change the process and change the number of times someone has to bless something to try a new innovation or development program”
- **Working Session Feedback:** “The sense of complacency - people here tend to say “we can do it, but it’ll take time” as opposed to determining proactive and faster ways to meet needs”
- **Working Session Feedback:** “Not comfortable in taking the risk to do what you need to do, because of the huge focus on output and metrics”
- **Working Session Feedback:** “We have to be more willing to take risks, think outside the box, be open/flexible, be open-minded, accept failure, be responsible, stop being afraid, adapt, speak out against the establishment, be willing to change, and break down barriers”
- **Working Session Feedback:** “We need to promote and encourage the idea of one SSA”

# Innovative Organization Feedback

The following provides feedback from stakeholder that support recommended strategic initiatives by Vision Objective



## Customer-Centric Infrastructure

- **Pre-Launch Outreach:** "Business should be driver for technology - SSA needs to look ahead and think about what technologies is needed to support the business rather than just maintaining what they have right now"
- **Public Survey:** "I think it would help us, as customer service technicians, if we can also have a system to see what the customer is seeing"
- **Working Session Feedback:** "A lot of times you have to update a lot of systems, this needs to be simplified, so you can update in one place and it's automatically updated everywhere"
- **Manager Survey:** "Move to a customer centric view that includes a real customer profile for each client vs. our current claims based view- Invest in the review of legacy software code and document the logic of those older software modules"
- **IdeaScale:** "Personal data is the one critical topic that is on everyone's mind these days with all the news about hacking and the like. Our customers need trust "big government" with their personal information. How do you expect anyone to believe that SSA can protect it? We need to obtain and enlist superior technology and expertise to protect it, and assure the American Public that it is protected. That technology and expertise exists in the National Security Agency. Why can't they protect SSA's system environments?"
- **Pre-Launch Outreach:** "Strategically engage all stakeholder groups in facilities planning"

# Appendix D:

## Current Initiative Details

# Current Initiatives Details



## Consolidated Customer Experience Management

Tracking #	Initiative Name	What the Initiative Accomplishes	Component Owner
<b>Customer Experience Management</b>			
142	<b>Customer Connect</b>	Simplifies how customers connect with employees, connects public to SSA, and aims to serve changing needs of customers	Unknown
<b>Customer Data Analytics</b>			
64	Speech analytics from 800 number system upgrades	Establishes an infrastructure that enables understanding of voice of the customer	Operations
66	<b>Compassionate allowances (CAL)</b>	Identifies applicants with most serve disabilities and expedites decisions	Retirement and Disability Policy
108	<b>Google Analytics on secured server sites</b>	Collects page view data from Google Analytics to obtain additional management information and user/behavioral statistics	Operations
125	<b>Demographic research</b>	Analyzes demographic/economic trends to improve OASDI and SSI effectiveness	Retirement and Disability Policy
133	<b>Collaborative research</b>	Researches issues such as improving service to disabled veterans and reducing homelessness with the Veterans Administration	Retirement and Disability Policy

# Current Initiatives Details



## Omni-Channel Customer Experience

Tracking #	Initiative Name	What the Initiative Accomplishes	Component Owner
Customer Channel Improvement			
36	Queuing system improvements	Improves queuing in field office through VIP software	Operations
49	Customer communications improvements	Improves to notices and social security statements including technology capabilities	Communications
69	Occupational information system	Creates web-based system for easier use and increases the quality of disability decisions through providing current information about specific job requirements	Retirement and Disability Policy
96	Return to work online information system	Creates and maintains electronic information technology systems that provide disabled beneficiaries access to a self-directed employment support structure	Retirement and Disability Policy
98	Self-Help PC enhancements	Improves self service options in field offices	Operations
101	Social security electronic remittance system	Enables credit card payments in field offices	Budget, Finance, Quality, and Management
127	Improving employment support programs	Examines the performance of employment networks through regular contact and site visits and determines improvements	Retirement and Disability Policy
135	Critical Eight: Reduce the Wait for a Hearing Decision	Seeks to identify methods to reduce hearing wait times to an average of 270 days without sacrificing customer service quality	Multiple

# Current Initiatives Details



## Omni-Channel Customer Experience

Tracking #	Initiative Name	What the Initiative Accomplishes	Component Owner
Customer Channel Expansion			
33	Video service delivery expansion	Provides disability determinations through video, and includes updating spaces for video hearings in offices	Operations
35	Online card replacement pilot	Creates ability for customers to replace social security cards online	Operations
79	iAppeals	Makes Internet versions of the SSA-561 (Request for Reconsideration) (i561) and HA-501 (Request for Hearing by Administrative Law Judge) (i501) available and customers can complete steps through multiple visits	Operations
87	mySocialSecurity redesign	Creates adaptability of eService applications within mySocialSecurity through upgrades to the portal and architecture and creating the ability to support mobile devices	Operations
90	SSI telephone wage reporting system	Beneficiaries, their spouses and parents, and their representative payees can report monthly wages directly into the SSI system via a combination of touch-tone entry and voice-recognition software	Operations
97	Customer self service kiosk	Enhances and maintains Proof of Concept Customer Service Stations, which have experienced limited success	Operations
100	Online submission to eWork	Allows online work report submissions via the My SSA portal for SSDI beneficiaries	Retirement and Disability Policy
102	External partner desktop icons	Provides a direct link from a public computer to online services at external partner sites, such as libraries and senior centers	Operations
134	Critical Eight: Enhance Online Services	Broadens the number of services customers can access online and improves existing offerings	Multiple

# Current Initiatives Details



## Omni-Channel Customer Experience

Tracking #	Initiative Name	What the Initiative Accomplishes	Component Owner
Customer Channel Integration			
34	Smartclaim	Allows customers to start an application online and come into an office to complete it for retirement, disability, and Medicare benefits through a single application	Operations
65	Automated call back	Allows users to request a call back from a SSA telephone representative during their online experience	Operations
94	Real-time customer assistance	Allows anyone navigating the SSA website to communicate with a representative through click-to-communicate technologies and screen-sharing	Operations

# Current Initiatives Details



## Customer Empowerment and Choice

Tracking #	Initiative Name	What the Initiative Accomplishes	Component Owner
<b>Customer Engagement Strategies</b>			
39	<b>Updates to the public</b>	Provides updates via email and text to the public	Operations
48	<b>National marketing outreach to customers</b>	Creates national marketing campaign and advocacy outreach	Agency-wide
50	<b>Solicited ideas for improvement from customers</b>	Collects customer thoughts through IdeaScale	OCSO
51	<b>Consolidated marketing</b>	Creates consistent messaging in marketing through a website for field offices to order marketing materials from	Communications
52	<b>Video hearing marketing</b>	Promotes use of video hearings to the public	Communications
58	<b>Automated communications to customers with options for action</b>	Provides notices and options for customers to control their accounts to prevent fraud, provides alerts for when changes to accounts occur, and lists program details	Multiple
56	<b>Notice improvements</b>	Improves readability of notice language for disability and Title 16 notices	Retirement and Disability Policy
93	<b>Secure message center</b>	Allows mySocialSecurity account users to receive alerts, messages, and agency announcements through customer engagement tools	Operations
126	<b>Improving employment support outreach to targeted working-age beneficiaries</b>	Automates telephone calls to beneficiaries that are determined most likely to return to work and provides Ticket to work information	Retirement and Disability Policy
129	<b>PROMISE</b>	Partners with Departments of Education, Labor, and Health and Human Services to promote positive outcomes for children who receive Supplemental Security Income (SSI) and their families	Retirement and Disability Policy



# Current Initiatives Details



## Customer Empowerment and Choice

Tracking #	Initiative Name	What the Initiative Accomplishes	Component Owner
<b>Customer Engagement Strategies</b>			
130	Retirement security research	Produces, plans, and coordinates a body of research products that will help inform the public about retirement planning, including when to begin receiving Social Security benefits	Retirement and Disability Policy
132	Ticket to work program	Helps disabled beneficiaries return to work and reduce or eliminate their dependence on cash benefits	Retirement and Disability Policy
136	<b>Critical Eight: Educate the Public about Social Security Programs</b>	Uses multiple engagement channels to ensure that the public is aware of, and educated about the importance of Social Security and their options	Multiple
<b>Tailored/Adaptive Service</b>			
124	<b>100% permanent and total veterans initiative</b>	Provides expedited disability case processing for veterans	Retirement and Disability Policy

# Current Initiatives Details



## Employee Engagement

Tracking #	Initiative Name	What the Initiative Accomplishes	Component Owner
<b>Employee Engagement Strategy</b>			
7	<b>Awards and recognition</b>	Recognizes employee accomplishments across components	Human Resources
11	<b>Employee engagement toolkit</b>	Equips employees with online tools for improving engagement and satisfaction	Human Resources
118	<b>ODAR employee engagement</b>	Creates engagement improvements using FEVS scores and communications with constant and consistent messaging connected to the mission	Disability Adjudication and Review
119	<b>Employee engagement community of practice</b>	Reviews FEVS data and develops engagement action plans and works with components on improving engagement	Human Resources
<b>Employee Feedback Mechanisms</b>			
10	<b>Direct employee feedback</b>	Solicits employee feedback through forums for union employees, check-ins, websites, and face to face meetings with non-union employees	Human Resources
12	<b>Employee representative feedback</b>	Solicits feedback about employees through employee representatives (e.g., advisory councils, associations)	Human Resources
56	<b>Usability testing (internal)</b>	Assesses usability of internal websites to understand changes needed	Budget, Finance, Quality, and Management
111	<b>Federal Employee View Point Survey (FEVS)</b>	Addresses results and institutes improvements based on FEVS at the component level	Multiple
116	<b>IdeaScale software for employee feedback</b>	Uses IdeaScale across the organization to capture feedback on targeted topics	Multiple
<b>Integrated Employee/Customer Management – No Current Supporting Initiatives</b>			

# Current Initiatives Details



## Employee Development

Tracking #	Initiative Name	What the Initiative Accomplishes	Component Owner
<b>Employee Development Plans/Programs</b>			
1	<b>Competency-based management tools to assess and close gaps in skills</b>	Creates a competency model and learning platform to provide training, development opportunities, and hiring to close identified skill gaps	Human Resources
2	<b>Development programs and rotational assignments</b>	Continues and expands the over 40 development and rotational programs	Human Resources
4	<b>Management and leadership skills development programs</b>	Provides leadership skills development to selected participants	Human Resources
5	<b>Action planning</b>	Series of initiatives tied to planning and improving employee development and satisfaction	Human Resources
6	<b>Interagency rotational program</b>	Offers interagency rotational program to further develop employees	Human Resources
8	<b>Mentorship</b>	Offers formal National Mentoring Program for employees, managers, and leaders (Piloted), as well as component specific mentorship connect	Human Resources
9	<b>University Partnership Programs</b>	Provides education courses for employees through universities	Human Resources
138	<b>Critical Eight: Promote Employee Development and Employee Engagement</b>	Develops programs and opportunities for employees to grow and advance	Multiple
<b>Training</b>			
21	<b>Management and supervisor training expansion</b>	Improves flexibility and responsiveness of leadership through technical skills, leadership competencies, and emphasis on performance management	Human Resources
22	<b>Career enrichment workshops</b>	Provides workshops for GS-12 and below that provide additional employee development	Human Resources
23	<b>In-house coaching</b>	Selects participants to receive 6 month government-wide coaching training program	Human Resources
24	<b>On demand training and development</b>	Markets comprehensive online library of course, eBooks, videos, and audio books	Human Resources

# Current Initiatives Details



## Employee Development

Tracking #	Initiative Name	What the Initiative Accomplishes	Component Owner
<b>Training</b>			
25	<b>Topic specific training</b>	Raises employee awareness on topics including identifying and reporting fraud, security, Union contracts, personal development, policy writing, disability reviews, and disability workload	Human Resources
109	<b>Analyst Training</b>	Provides organization-wide curriculum to provide analysts with requisite tools and training	Retirement and Disability Policy
<b>knowledge-sharing</b>			
3	<b>Detail assignment expansion</b>	Creates visibility of detail opportunities across all components (possibly in a central repository)	Human Resources
14	<b>Human Resources Services Portal</b>	Creates a one stop shop for answering HR needs for employees	Human Resources
15	<b>Agency-wide knowledge management plan</b>	Plans for structure around information and knowledge-sharing to fight the knowledge gap when employees retire	Human Resources
16	<b>Web-based collaboration platform</b>	Provides SharePoint and a web based platform for communication across the organization	Human Resources
17	<b>Talent and skills sharing platform pilot</b>	Creates a platform to develop and share skills and talent to create an agile and engaged workforce	Human Resources
76	<b>Enterprise SharePoint Architectures</b>	Provides a consistent collaboration point and content management for employees	Human Resources
103	<b>SSA digital library website redesign</b>	Creates a dynamic, widget-based website with a website content management system that provides maximum flexibility for the content administrators to control all content	Human Resources
115	<b>vHELP web support</b>	Creates a web-based Help Desk environment that allows subject matter experts from the regions to work collaboratively to provide programmatic and systems assistance to front line employees on all policy questions (regional level to component)	Human Resources
137	<b>Critical Eight: Improve Succession Planning</b>	Identifies and creates developmental opportunities necessary to ensure continuity in leadership and other critical agency positions	Multiple

# Current Initiatives Details



## Employee Empowerment

Tracking #	Initiative Name	What the Initiative Accomplishes	Component Owner
<b>Employee Flexibility</b>			
13	Work-life balance	Provides increased telework options, institutes work/life balance services and family friendly policies, and offers employee seminars	Human Resources
57	Telework analysis and expansion through single device setup (SDS)	Improves employee flexibility by enabling employees to work from different locations; includes technology to enable telework	Multiple
114	Reducing the backlog at the Appeals Council	Adjusts Appeals Council staff levels to reduce the Appeals Council backlog and meet any changes in capacity at DDS and hearings levels	Disability Adjudication and Review
<b>Recruitment</b>			
18	Interview and hiring resources	Develops materials that guide management during the hiring process	Human Resources
19	Diversity and Inclusion in Hiring	Ensures that the SSA workforce is representative of its customers, including Veterans and people with disabilities	Human Resources
20	Pathways program expansion	Attracts talented workforce with meaningful training and development opportunities	Human Resources
<b>Employee Ownership/ Accountability</b>			
110	Electronic disability bench book expansion	Develops materials to help adjudicators analyze and document decisions on disability appeals	Disability Adjudication and Review
112	How am I doing tool	Provides real-time performance related feedback to employees	Disability Adjudication and Review
113	eFolder and local CPMS data	Automatically generates a personal list of case processing activities for the day, week, month, etc. for each employee, tailored to their job-specific workload profile	Disability Adjudication and Review

# Current Initiatives Details



## Continuous Improvement

Tracking #	Initiative Name	What the Initiative Accomplishes	Component Owner
<b>Process Efficiency</b>			
37	<b>Workload management national expansion</b>	Balances workloads through automated tracking of paperwork products in field offices using the WebACE system	Operations
38	<b>Workload support units</b>	Units that quickly processes retirement claims, and will now process disability claims through a pilot	Operations
40	<b>Social security number application process enhancements</b>	Provides web-based system where employees record enumeration information and enables employees to correct information for customers	Operations
45	<b>Continuous quality improvement reviews</b>	Compiles recommendations for improvement and then plans, evaluates, and implements outcome-based process and automation improvements across service delivery components (BFQM, ODAR, Operations)	Operations
46	<b>Death reporting system improvements</b>	Efforts to improve data quality including expansion of Electronic Death Registration (EDR), data exchange agreements, and technology improvements	Operations
53	<b>Acquisition process improvement</b>	Enhances transparency of expenditures including new technology, Sunflower Assets Property System, and contractor credentialing	Budget, Finance, Quality, and Management
60	<b>Alien/foreign enumeration</b>	Maintains partnership with DHS and Dept. of State that automatically enumerates certain classes when authorization is provided	Retirement and Disability Policy
67	<b>Earnings redesign</b>	Enhances efficiency and accuracy of wage reporting to better handle increase in volume	Operations
71	<b>E-Gov travel services 2</b>	Implements ETS2 for streamlined travel management	Systems
73	<b>Electronic disability</b>	Automates aspects of the disability determination process, including case processing, quality review, and collection of medical evidence	Retirement and Disability Policy

# Current Initiatives Details



## Continuous Improvement

Tracking #	Initiative Name	What the Initiative Accomplishes	Component Owner
<b>Process Efficiency</b>			
75	<b>Web-based Electronic Claims Analysis Tool (eCAT) Improvements</b>	Supports disability claims processing system and continuing disability reviews by guiding adjudicators through the five-step sequential process for determining disability	Retirement and Disability Policy
89	<b>Case processing enhancements</b>	Updates systems to centralize workload functions to help reduce the backlog	Disability Adjudication and Review
99	<b>Registration and Customer Support (RCS) and CHIP enhancements</b>	Improves work processes for employees and service delivery to the public	Operations
105	<b>Strengthen the Enumeration Systems</b>	Makes iterative improvements to the system to ensure the integrity and automation of the enumeration process	Systems
121	<b>Expand the NCAC Model</b>	Centralizes case-pulling and decision-writing workloads and increases telework and shiftwork options	Disability Adjudication and Review
<b>Improper Payment/Fraud</b>			
41	<b>Case tracking tool</b>	Provides insight on where cases are in the process to pursue fraud cases	Operations
42	<b>Cooperative Disability Investigations (CDI) expansion</b>	Additional units that gather information on disability claims and approve or deny benefits	Operations
43	<b>Fraud prevention units</b>	Overall Fraud Prevention Units for all aspects of benefits fraud and business processes and system releases designed to prevent, detect, track, and recover fraudulently redirected benefit payments	Operations

# Current Initiatives Details



## Continuous Improvement

Tracking #	Initiative Name	What the Initiative Accomplishes	Component Owner
<b>Improper Payment/Fraud</b>			
55	Anti-fraud infrastructure	Stands up anti-fraud program, office, and committee	Budget, Finance, Quality, and Management
80	Audit trail system architecture	Captures details of transactions most vulnerable to fraud	Systems
88	Beneficiary payment and reporting	Streamlines processes, implements newly required legislative mandates, and implements strong internal controls to improve the accuracy and timeliness of benefit payments	Retirement and Disability Policy
106	Systems Integrity	Ensures fraud and abuse detection and prevention programs are robust and flexible	Systems
<b>Data Exchange</b>			
30	Financial data exchange refinement	Improves automation with bank account verifications to support SSI eligibility	Operations
31	Data exchange community of practice	Collaborates on data exchange activities, shares best practices, finds common solutions to data exchange challenges, and builds a network of federal data exchange partners	Operations
32	Agency Specific Data Exchange	Data exchange focused on specific information (e.g., fugitive data with prisons, IRS tax information)	Multiple
72	eHealth Data Exchange and HIT	Connects medical providers, Department of Defense (DoD), and Department of Veterans Affairs (VA) (target is only at 8% for 2016)	Retirement and Disability Policy
77	Virtual lifetime electronic record	Addresses service members and veterans' needs as seamlessly as possible when applying for Social Security benefits by fully automating access to medical records across DoD, VA, and SSA	Retirement and Disability Policy
81	Integrated Data Exchange Application (IDEA)	Maintains over 1,500 data exchanges and is modernized into new centralized application	Operations



# Current Initiatives Details



## Continuous Improvement

Tracking #	Initiative Name	What the Initiative Accomplishes	Component Owner
<b>Data Exchange</b>			
131	<b>Public-private Community of Excellence (CoE)</b>	Meets with private, state and Federal stakeholders to identify ways to streamline health and human services by approaching data as a strategic resource, identifying needs and leveraging technology and sharing data	Retirement and Disability Policy
<b>Data Analytics</b>			
29	<b>Workforce Analysis</b>	Analyzes workforce data (e.g., retirement and applicant flow) to support planning to prevent gaps in knowledge and provide updates to diversity and inclusion councils	Human Resources
54	<b>Fraud Detection and Prevention Analytics</b>	Implements enterprise analytics solutions for fraud including predictive analytics for overpayments and disability fraud	Systems
74	<b>Emergency Response System</b>	Uses geospatial information system technology to provide real-time information during emergencies	Operations
91	<b>Data Quality Assurance</b>	Provides baseline quality assessments of data, monitoring of data through Electronic Quality Assurance (eQA), and publishing of data to data.gov	Budget, Finance, Quality, and Management
92	<b>Quick Disability Determinations (QDD)</b>	Expedites case workload by using a computer-based predictive model to screen initial applications to identify cases where a favorable disability determination is highly likely	Retirement and Disability Policy
120	<b>Analysis to automate processes within case processes, reviews, and hearings (series of pilots)</b>	Includes a series of pilots that use data to automate movement of case workloads including case remands	Disability Adjudication and Review
123	<b>Predictive Modeling in Continuing Disability Review and Redetermination</b>	Identifies Social Security disability beneficiaries whose earnings put them at risk of receiving overpayments and identifies and prioritizes redetermination cases that have a high likelihood of error	Disability Adjudication and Review
141	<b>Critical Eight: Accelerate the Use of Data Driven Decision Making</b>	Uses collected data to identify patterns and improve customer service and investigates new ways data can be leveraged to anticipate customer and agency needs	Multiple

# Current Initiatives Details



## Adaptive Culture

Tracking #	Initiative Name	What the Initiative Accomplishes	Component Owner
<b>Culture/Change Management</b>			
27	<b>Enhance top-down communications</b>	Provides different types of communications (e.g., town halls, meetings, emails) within each component to employees	Human Resources
28	<b>Human capital management</b>	Assesses weaknesses and strengths of human capital through data-driven human capital reviews and established governance structure	Human Resources
117	<b>Virtual hallway</b>	Connects employees across offices virtually using technology	Disability Adjudication and Review
<b>Executive Accountability</b>			
26	<b>Policy compliance</b>	Changes to data and channels to be compliant with Data Act, Section 504, and electronic remittance to reduce cash acceptance	Human Resources
104	<b>Strategic IT Investment Process</b>	Provides governance and oversight of IT investments	Systems
140	<b>Critical Eight: Establish the Enterprise Program Management Office</b>	Improves oversight and transparency to develop and deploy projects on time, within budget, and with quality results	Multiple

# Current Initiatives Details



## Customer-Centric Infrastructure

Tracking #	Initiative Name	What the Initiative Accomplishes	Component Owner
<b>Technology Modernization</b>			
47	Disability case processing system	Replaces 54 systems to provide common functionality and consistent support to each disability determination system (DDS)	Operations
61	Application portfolio mgmt.. (APM) and IT gov. and architectural planning	Determines the health of IT and software applications	Systems
63	Business Intelligence	Establishes a flexible reporting and analysis environment for telephone service	Systems
68	Enterprise data, database architecture, and storage management	Provides services to other development project teams for creating application software and databases, procuring new hardware, and defining storage requirements	Systems
70	Document management architecture	Expands reach of paperless management of information	Operations
78	Routine updates to financial and HR systems	Updates HR and financial systems with current technology to keep systems functioning	Systems
83	Intelligent disability (iDIB) program	Updates from a paper-based disability process to an integrated electronic set of systems	Operations
84	Virtual desktop infrastructure (VDI)	Provides virtual capabilities in four projects	Operations
85	Medicare database enhancements	Structures the Medicare databases to enhance internal and external processing of cases. These changes will aid frontline employees by reducing redundancies and allowing for more data propagation between systems	Systems
95	Representative payee redesign	Enhances RPS application by streamlining the actions and processes taken for representative payee selections, accounting, misuse, and monitoring determinations	Systems
107	Title II and Title XVI claims and post entitlement	Eliminates older, outdated systems, and replaces with more robust and modern systems to increase systems processing efficiency, eliminate labor intensive manual processing, and improve the accuracy and timeliness of T2 payments	Systems
128	PolicyNet publication system (PPS)	Updates PolicyNet system to fix vulnerabilities	Retirement and Disability Policy
139	Critical Eight: Transform IT Investment Process	Updates the IT Investment Process to be more streamlined and responsive to the needs of its customers	Multiple

# Current Initiatives Details



## Customer-Centric Infrastructure

Tracking #	Initiative Name	What the Initiative Accomplishes	Component Owner
<b>Cybersecurity</b>			
62	Authentication	Ensures the privacy and security of personal information and currently does not support all online services	Operations
82	Information security program	Protects information and communications assets, including ability for managers to terminate access	Systems
<b>Physical Infrastructure</b>			
44	Footprint reduction	Reduces physical space and creates shared spaces (e.g., consolidated field and hearing offices, IRS video capability sharing)	Multiple
59	National support center	Increases computing power and data capacity	Budget, Finance, Quality, and Management
122	ODAR office expansion	Expands number of offices and employees for ODAR	Disability Adjudication and Review

# Appendix E:

## Execution Strategy

## Tools and Templates

# Step One: Descriptions of key roles and responsibilities

Key Role	Summary of Responsibilities	Proposed SSA Alignment
<b>Leadership Role</b>	<ul style="list-style-type: none"> <li>Provides final approval on Agency Strategic Plan, Agency Priority Goals, and prioritized and the related transformational initiatives</li> <li>Maintains oversight of governance process</li> <li>Provides direction on key issues relating to the agency</li> <li>Leads by example in the execution of the strategy</li> <li>Approves budget for transformational initiatives</li> </ul>	(A)COSS
<b>Transformation Champion Role</b>	<ul style="list-style-type: none"> <li>Responsible for agency transformation (Commissioner-appointed)</li> <li>Chairs the Transformation Leadership Committee</li> <li>Defines budget for prioritized transformational initiatives</li> <li>Ensures prioritized transformational initiatives, once selected, are assigned an owner(s)</li> <li>Presents leadership with progress reports and action plans</li> <li>Leads quarterly data-driven initiative progress review meetings</li> </ul>	DC-level representative (e.g., Chief Strategic Officer)
<b>Transformation Leadership Committee</b>	<ul style="list-style-type: none"> <li>Decides on Vision objectives and transformational initiative prioritization and sequencing</li> <li>Supports transformational initiative owners, as necessary</li> <li>Participates in quarterly and annual reviews to assess initiative progress towards goals and presents leadership with action plan based on review results</li> </ul>	DCs representing all components
<b>Consultative Group Role</b>	<ul style="list-style-type: none"> <li>Provides input on transformational initiatives based on the knowledge, skills, and experience they bring from respective components</li> <li>Serves as a sounding board for the Transformational Leadership Committee, including preparing for and following up on progress reviews</li> </ul>	Champions of Change (i.e., EVC)
<b>Convener and Coordinator Role</b>	<ul style="list-style-type: none"> <li>Facilitates collaboration across the organization to make strategic decisions</li> <li>Gathers and analyzes data to compile progress measures on transformational initiatives for data-driven review process</li> <li>Provides information for, and facilitates decisions on, prioritization discussions</li> <li>Packages and translates the strategy to the rest of the organization</li> <li>Provides expertise on Vision 2025, including: awareness of employee feedback, Vision objectives, focus areas, and current and transformational initiatives</li> <li>Partners with Transformation Champion role to prepare for and execute quarterly and annual formal reviews</li> </ul>	OCSO
<b>Transformational Initiative Owner Role</b>	<ul style="list-style-type: none"> <li>Manages all aspects of owning and implementing assigned initiatives, including developing measures and identifying key milestones and dependencies</li> <li>Reports to Transformation Leadership Committee on measures for assigned initiative</li> </ul>	Initiative Owners

# Step One: SSA must also develop an accountability structure

Each of the key roles' responsibilities involve the strategic planning key elements, which can best be illustrated through a RACI Matrix.

## RACI Key

**R** - Who is Responsible? (The doer)

**A** - Who is Accountable? (Ultimate ownership)

**C** - Who is Consulted before an action or decision is made?

**I** - Who is Informed of the action or decision?

## Considerations

- At least one role must be Responsible per activity (but more than one role can be Responsible)
- Only one role can be Accountable (A) per activity identified
- One role can be both Responsible and Accountable
- Consult (C) and Inform (I) may not always be applicable (assign as appropriate)

## Key Roles

<div><b>RACI Key</b>  R - Who is Responsible? (The doer) A - Who is Accountable? (Ultimate ownership) C - Who is Consulted before an action or decision is made? I - Who is Informed of the action or decision?  <b>Considerations</b><ul style="list-style-type: none"><li>At least one role must be Responsible per activity (but more than one role can be Responsible)</li><li>Only one role can be Accountable (A) per activity identified</li><li>One role can be both Responsible and Accountable</li><li>Consult (C) and Inform (I) may not always be applicable (assign as appropriate)</li></ul></div>		Key Roles					
		Leadership Role	Transformation Champion Role	Transformation Leadership Committee	Consultative Group Role	Convener and Coordinator Role	Transformational Initiative Owner Role
Key Elements	Accountability Structure and Performance Measures	A	R	C	I	R	C, I
	Prioritized Goals and Transformational Initiatives	C	R, A	R	C	R	I
	Transformational Initiative Planning	I	A	R	C	C	R
	Budget for Transformational Initiatives	A	R	C	I	C	R
	Continuous Evaluation and Reporting	I	A	C	C	R	R
	Data-Driven Reviews	C	R, A	R	C	R	I
	Communications	I	I	I	C	R, A	C



# Step Two: Reference Guide to Reading the Roadmap



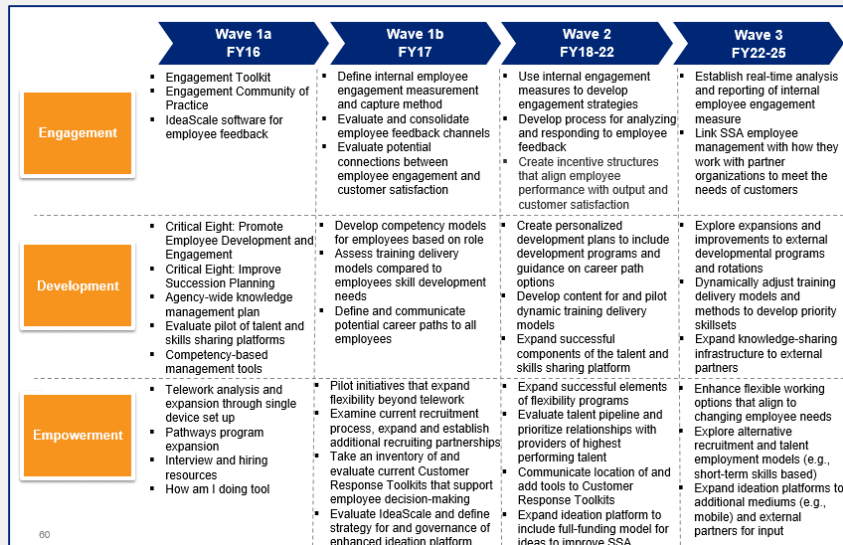
The three Vision priorities each have three Vision objectives



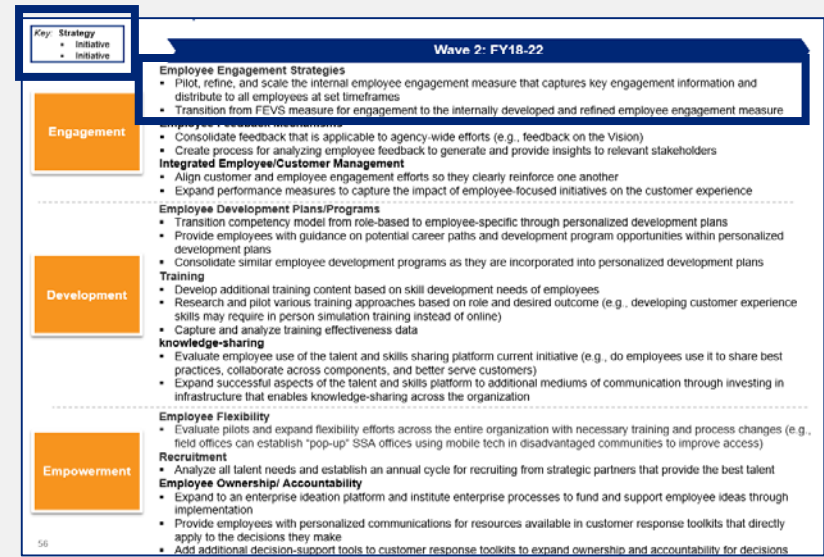
Each Vision Objective has a description and By 2025... statement to add context



Each Vision Objective has strategies and objectives



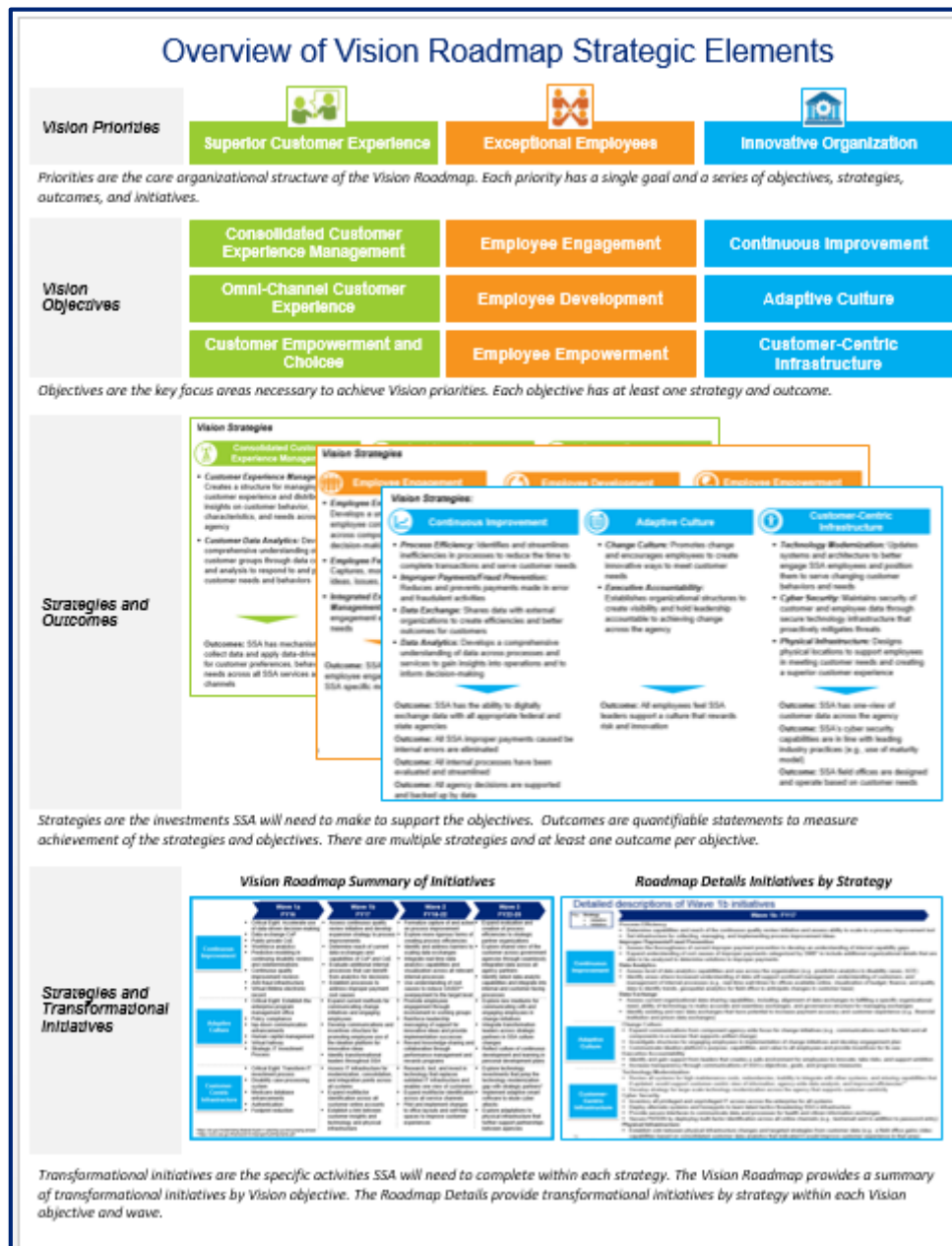
Each Vision priority has a summary Roadmap summarizing the transformational initiatives for each Vision objective (Note: Waves align with Agency Strategic Plans)



Every Wave has a detailed overview of the transformational initiatives by strategy (sample strategy highlighted)



# Step Two: Overview of Vision Roadmap Strategic Elements



Adobe Acrobat  
Document

## Step Two: Sample Prioritization Working Session Agenda

**Session Purpose:** Confirm priority objective outcomes and the current capability gaps within each priority to meeting those outcomes

Time	Description
8:30 – 9:00	<b>Welcome/ Introductions</b> <i>Session hosts welcome the group and explain session purpose and agenda. Participants introduce themselves and provide quick overview of their experience and tenure at SSA.</i>
9:00 – 9:15	<b>Overview of Vision 2025 Goals and Priority Vision Objectives</b> <i>Discuss the approach to developing the Vision priority goals, Vision objectives, and Roadmap, ending with a deeper-dive on the session's priority.</i>
9:15 – 10:00	<b>Current Initiative Analysis Review</b> <i>Explain the purpose of the current initiative analysis and discuss if there are any capability gaps to meeting the goals within the priority. (Note: participants would have received pre-read materials for the discussion)</i>
10 minutes	<i>Break</i>
10:10 – 11:20	<b>Vision Roadmap Review</b> <i>Break out into three groups (one per priority Vision objective) to evaluate the initiatives in each Wave for the priority, discussing if they address the current capability gaps and are sequenced in the right order to achieve the goals.</i>
11:20 – 12:00	<b>Group Discussion</b> <i>Each group reports out on their findings for their Vision objective and facilitator leads group discussion to validate if collectively, the Roadmap gets SSA to where it wants to be in 2025 for the priority.</i>
12:00 – 12:15	<b>Wrap Up</b>

## Step Two: Sample Leadership Questions Template

Vision 2025 Leadership Briefing	
Name	
<p><b><i>As you and your team review the Roadmap in preparation for the Briefing on X/XX/XX, please do not hesitate to contact OCSO should you have any questions on the approach and content. You may contact (enter name, email address) directly or submit this template to the Vision 2025 mailbox (^Vision2025).</i></b></p>	
<b>Questions on Approach</b> <ul style="list-style-type: none"> <li>• External research</li> <li>• Stakeholder feedback</li> <li>• Current initiative analysis</li> <li>• Working Sessions to finalize and confirm the initiatives in each priority</li> </ul>	
<b>General Questions on Roadmap Content</b>	
<i>Superior Customer Experience</i>	
<i>Exceptional Employees</i>	
<i>Innovative Organization</i>	
<b>OCSO POC: (enter name, email address)</b>	

## Step Three: Tool for developing effective metrics

The Metric Fact Sheet is a tool that guides you through key questions to consider when developing metrics. Initiative Owners should complete a fact sheet for each metric.

Consideration of past data allows you to set a target that is feasible:

- What does the historical data show on this objective over time?
- Is it reasonable to assume continuation along a trend?

Availability and quality of data is important when considering how the metrics will be used within SSA's strategic planning process:

- Example: If validated data is available annually, and SSA has quarterly strategy review meetings, a new metric to track progress more regularly will be preferable

### Metric Fact Sheet

<b>Metric:</b>			
<b>Metric Description:</b>			
<b>Goal:</b>	<b>Priority:</b>	<b>Program:</b>	
<b>Baseline:</b> X%, number, rate, etc.	<b>Baseline Year:</b> 20XX	<b>Target:</b> X%, number, rate, etc.	<b>Target Year:</b> 20XX
<b>Justification for setting of target (see target setting guidance):</b>			
<b>1) Is data currently available? If so, what is the most recently available data?</b>			
<b>2) How far back does the data go?</b>			
<b>3) What is the lag in data reporting and validation? For example, data is collected quarterly but not available for 6 months.</b>			
<b>4) What system(s) is the data stored in? Or what source does the data come from?</b>			
<b>5) What are the ways the data is disaggregated? (e.g., by gender, race, age, county, city, region, urban/rural)</b>			
<b>6) How frequently is the data collected? Yearly, quarterly, monthly, weekly, daily?</b>			
<b>7) What are the known data limitations?</b>			
<b>8) Who in your organization is responsible for setting performance targets? Please provide their name and contact information.</b>			

The final justification for setting a target is likely a combination of factors below. The data sheet indicates that the metric is reasonable, aspirational, based on historic data, and directly linked to the desired outcome


Analysis of disaggregated data can allow you to identify top-performing groups or initiatives, and the drivers of the success:

- Example, are there certain districts outperforming others?

In addition to ensuring accountability, consider and record the number of resources within the organization that will be dedicated towards achieving this objective

## Step Four: Sample\* Prioritization Scoring Matrix

Rating criteria to quantify the estimated impact of an initiative

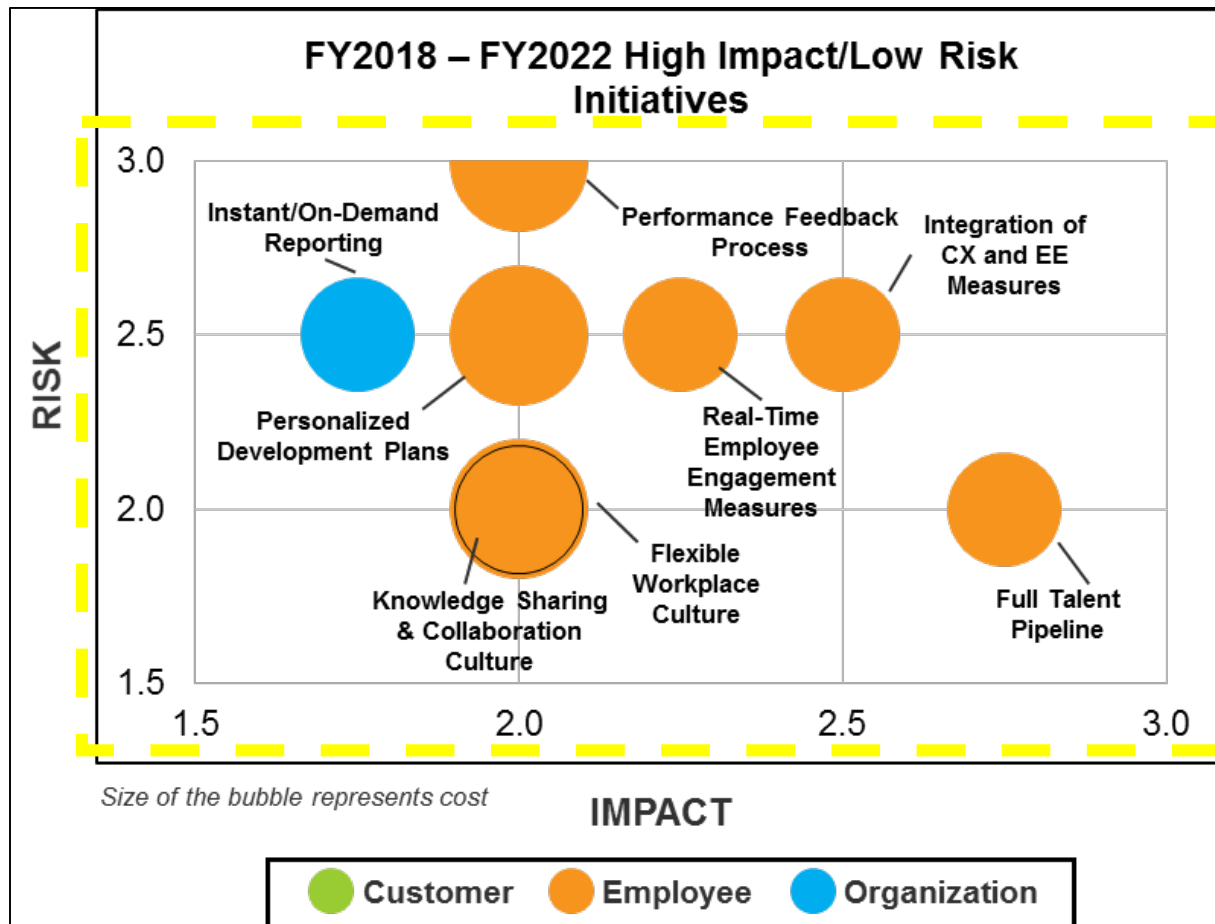
Rating Criteria:	Impact (X-Axis)					Complexity (Y-Axis)			Cost (Bubble Size)		
	3 = high impact 1 = low impact					3 = low complexity 1 = high complexity			3 = high cost 1 = low cost		
Proposed Initiative	Customer	Employee	Cross-Component	Ecosystem	Avg. Impact	Execution Risk	Business Risk	Avg. Complexity	Investment Costs	Recurring Costs	Avg. Cost
	 Customer										
Develop journey maps and conduct action segmentation for all other SSA services	2	1	2	1	1.5	3	1	2	3	3	3
Develop journey maps for external partner SSA-related services	2	1	2	3	2	2	1	1.5	3	3	3
Evaluate field office design and identify layout change needs based on findings	3	3	2	2	2.5	1	2	1.5	1	2	1.5
Establish inter-agency data sharing efforts to significantly reduce redundant data entry for customers across the government	3	1	2	3	2.25	1	2	1.5	1	1	1
Implement full channel integration for all services	3	3	2	1	2.25	1	2	1.5	1	2	1.5
Tailor customer experience across all services	3	2	2	1	2	2	1	1.5	2	2	2
Enhance tailored service delivery to include customer-driven tailoring	3	1	1	1	1.5	2	1	1.5	2	2	2

Scoring to estimate impactful, complex, and costly initiatives may be in order to help drive decision-making, prioritization, and budgetary planning

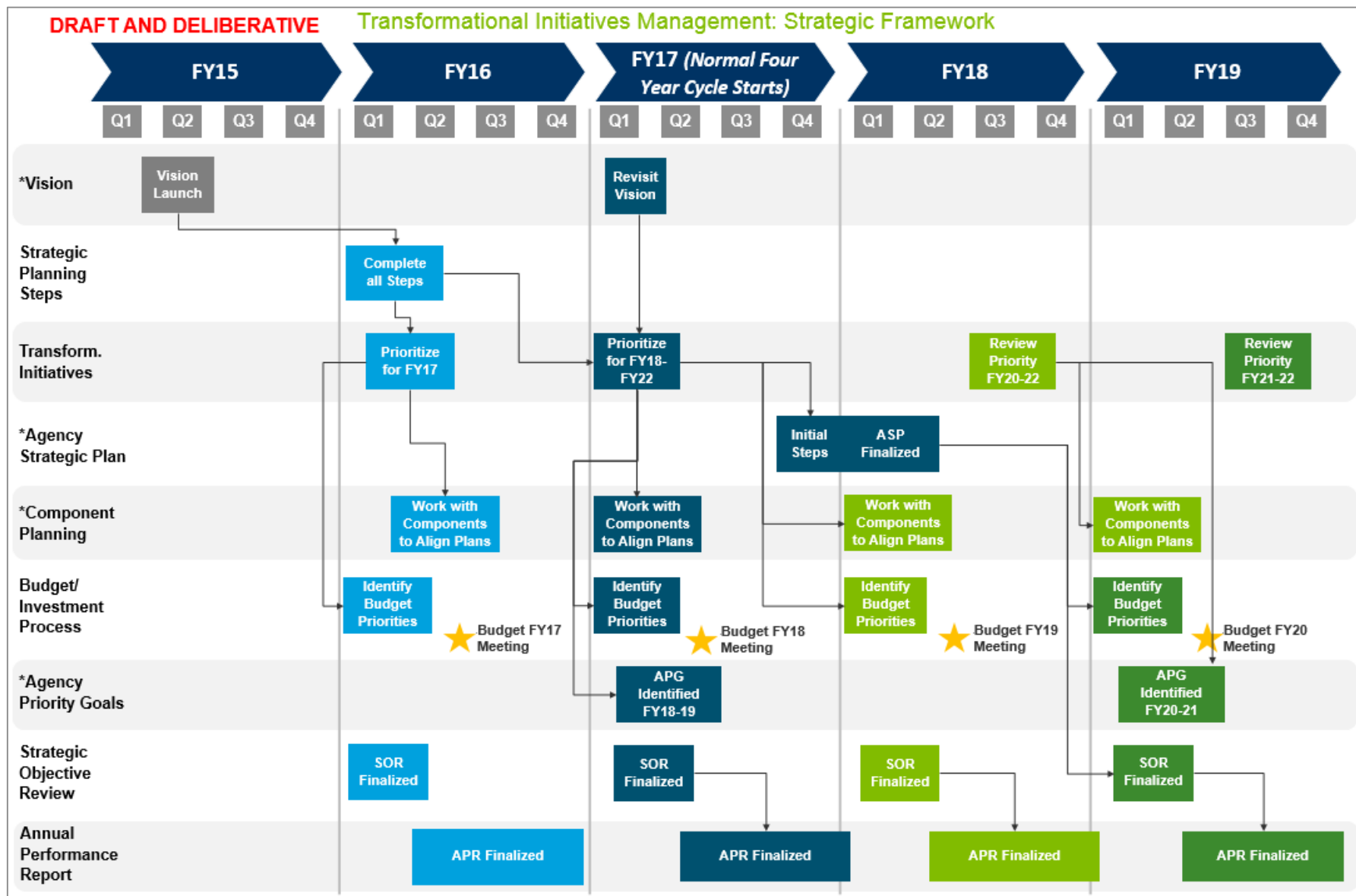
## Step Four: Sample\* Prioritization Visualization

This type of data visualization can be made in Tableau using the data from the Prioritization Scoring Matrix spreadsheet and the “Packed Bubbles” data visualization.

Uses initiative criteria ratings from the Scoring Matrix to display initiatives rank in relation to each other



# Transformational Initiatives Management Strategic Framework



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## **Timeline for Deloitte and Clearing Contracts**

### **Deloitte**

- Period of Performance: 12/19/14-01/18/16

### **Clearing**

- Period of Performance: 07/01/2016-12/31/2016

**ATTACHMENT 1 –  
STATEMENT OF WORK: OCSO STRATEGY AND PERFORMANCE MANAGEMENT SUPPORT  
SS00-16-30484**

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**ATTACHMENT 1 –  
STATEMENT OF WORK: OCSO STRATEGY AND PERFORMANCE MANAGEMENT SUPPORT  
SS00-16-30484**

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**I. Purpose**

The purpose of this Statement of Work (SOW) is to secure the services of a contractor with prior experience working within SSA's strategy planning process and in engaging senior executives to identify strategic direction for large organizations.

**II. Background**

At the recommendation of GAO Audit GAO-13-459, the Social Security Administration (SSA) established the Office of the Chief Strategic Officer (OCSO) in 2013 to create an entity dedicated to strategic planning. The Office of the Chief Strategic Officer (OCSO) for the Social Security Administration (SSA) works across organizational boundaries to infuse strategic thinking throughout the agency and ensure resources and initiatives are driving the achievement of agency goals and objectives.

Strategy and Performance management is a discipline that involves the formulation, implementation and evaluation of decisions that enable an organization to achieve its objectives. It is a continuous process of strategic analysis, strategy creation, implementation and monitoring, used by organizations with the purpose of achieving desired outcomes.

In essence, strategy and performance management answers the following three questions:

- What is the current state of the organization?
- Where does the organization want to go and what does it want to be?
- How will the organization get there?

The purpose of strategy and performance management is not about predicting the future, but rather about preparing for it and knowing what exact steps the organization will have to take to implement its strategic plan to achieve the desired outcomes.

The support that Social Security Administration (SSA) is seeking is the experience and expert advice of consultants who have worked with Federal agencies in defining and implementing a strategy management structure using a well-established methodology. Specifically, SSA is seeking consultation on its structure of strategy management governance and executive engagement skillsets for developing an agency strategic plan.

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OCSO has encountered organizational challenges in facilitating and obtaining feedback from SSA components. While this can be a challenge to any large federal organization with over 70,000 employees, SSA components also grapple with staff shortages, reduced funding and priority initiatives to modernize technology, programmatic systems. Specifically, the agency needs an integrated strategy and performance management framework to communicate with clarity SSA's goals, objectives and strategy and its performance to employees and stakeholders.

There are numerous cyclical and ad hoc activities that influence and/or change strategic direction and priorities without formal assessment of their long-term impacts. The agency needs a strong strategy governance framework to ensure that any strategic planning lifecycle are evaluated for potential ripple effects or unintended consequences. In addition, the strengthening of SSA's strategy management skillsets to ensure OCSO can continue to be the trusted advisor for all strategy and performance related functions within SSA.

Additionally, SSA has experienced waves of retirement and staffing changes and in order to function as the trusted advisor for strategy and performance functions, we must strengthen of SSA's strategy management skillsets.

SSA created its Critical 8 Priority initiatives utilizing 'The PRIME' methodology. The PRIME is a proprietary approach to strategic planning developed by The Clearing, Inc. The PRIME approach drives stakeholder alignment utilizing essential agreement (As Is, Environment, Stake, To Be, and Strategy) that align the organization and provides a model for structuring staff activities, roles and responsibilities.

OCSO is developing the next Strategic Roadmap to capture and communicate the strategic decisions and future direction of the agency. The Strategic Roadmap defines the mechanisms to implement our long-term strategy in three major sections:

- The Agency Critical Management Priorities,
- Agency Strategic Plan(s), and
- Long-range recommendations from key stakeholders.

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### III. Scope

#### Project Start-Up and Background Research

To build upon the existing road map and strategic vision, OCSO requires a vendor with expertise utilizing the PRIME methodology.

The scope of this Task Order is to provide consulting services on four tasks:

1. Build upon existing implementation efforts to refine the Strategic Roadmap
2. Assess and Refine current OCSO Strategy and Performance Management Structures and Efforts
3. Assess and Refine Current Agency Wide Strategy and Performance Management Structures and Efforts
4. Assess and provide consultation and training to eliminate skill gaps

Upon notification of award, the contractor shall submit the necessary forms to obtain suitability and clearance to work onsite at SSA. During the time, we are awaiting suitability determination, SSA will and the contractor shall participate in a kick-off/orientation meeting to discuss overall project management with the OCSO team. During this kick-off/orientation meeting, SSA and the contractor shall accomplish, at a minimum, the following:

- Introduce key project personnel;
- Level-set expectations;
- Define next steps;
- Establish milestones and communication protocols; and
- Schedule recurring meetings.

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The contractor shall develop and submit a work plan containing additional details about the contractor's approach and a detailed timeline of activities. The contractor shall update the work plan each month and submit the work plan for review by the Contracting Officer's Representative (COR). The COR will review the plan monthly to ensure the project is on track.

**TASK 1: BUILD UPON EXISTING IMPLEMENTATION EFFORTS TO REFINE THE STRATEGIC ROADMAP**

- The contractor shall utilize the proven processes in 'The Prime' to develop, vet and communicate the process and milestones for development of the FY 2018-2022 Agency Strategic Plan
- Using the methods of The Primes, the contractor shall design and implement a series of four approximately two hour working sessions with senior executives to determine and define Strategic Goals and Objectives for the FY 2018-2022 Agency Strategic Plan in accordance to Office of Management and Budget (OMB) guidance in the Circular A-11
  - The contractor shall develop an agenda and meet with Strategy and Performance Management Team members at least 2-weeks prior to a scheduled session to communicate the approach and determine background materials needed from the agency
  - The agency will be responsible for scheduling and coordinating all logistics for these working sessions, which will be held at SSA Headquarters in Woodlawn.
  - The contractor shall co-facilitate working sessions with an appropriate member of the OCSO team, as determined by OCSO leadership
- The contractor shall provide recommendations to OCSO on the use of the Strategic Roadmap to communicate and manage the agency's near-term critical management priorities as well as the long-term strategic goals and objectives of future Agency Strategic Plans.

**TASK 2: ASSESS AND REFINE CURRENT OCSO STRATEGY AND PERFORMANCE MANAGEMENT STRUCTURES AND EFFORTS**

- The contractor shall interview OCSO leadership (approximately 5 executives) and up to 10 SSA leaders outside of OCSO to identify opportunities/challenges with existing strategy and performance implementation efforts. A member of

May 6, 2016

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the OCSO team will coordinate the Interviews. The interviews shall be conducted at SSA headquarters in person for local SSA leaders and by phone for those located remotely.

- The contractor shall assess and provide recommended changes to OCSO's Integrated Strategy and Performance Management action plan.
- The contractor shall lead a working session with members of the OCSO Strategy and Performance Management Team to analyze and translate strategy working session outputs into actionable plans. The contractor shall provide expert guidance that will enable OCSO to facilitate strategic dialogs and translate that into clear, structured strategic objectives, priorities, and plans.

**TASK 3: ASSESS AND REFINE CURRENT AGENCY WIDE STRATEGY AND PERFORMANCE MANAGEMENT STRUCTURES AND EFFORTS**

- The contractor shall assess the existing enterprise strategy management structure and processes and provide recommendations on the management structure and governance elements
- The contractor shall conduct working sessions with the core team, focusing on leveraging prior work to recast current governance. The core team (Strategy and Performance Management Team) consists of approximately fifteen team members ranging from GS-13 Analysts to GS-15 OCSO Directors. The contractor shall conduct up to three governance-working sessions.
- Contractor shall provide recommendations to OCSO in communicating and implementing the new agency-wide Strategy and Performance Management governance structure. The contractor shall deliver a recommended Communications and Engagement Plan containing roles, responsibilities and milestones.
- The contractor shall co-facilitate up to five meetings with new Strategy and Performance Management governance groups and stakeholders to communicate roles, responsibilities and milestones and gather related feedback.

**TASK 4: ASSESS AND PROVIDE CONSULTATION AND TRAINING TO ELIMINATE SKILL GAPS**

- The Contractor shall determine the skills needed by the Strategy and Performance Management Team to independently facilitate ongoing strategy development and implementation within the Agency

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- The Contractor shall assess the current skills of the Strategy and Performance Management Team and identify skills gaps in the facilitation of strategy development and implementation within the Agency
- The Contractor shall mentor one to two assigned OCSO co-facilitator prior to a strategy session or meeting with external stakeholders to help build the skills and confidence in applying the facilitation techniques guided by The Primes model.
- Following any meeting or working session with external stakeholders that is co-facilitated by the contractor and OCSO, the Contractor shall meet with the OCSO co-facilitator(s) to evaluate the session, identify lessons learned and areas of improvement, and provide the OCSO co-facilitator(s) mentoring on the development of needed skills

**IV. Deliverables:**

Task	Deliverable	Due Date
Task 1	A. Refined Strategic Roadmap, which will support the communication and management of strategic direction and milestones for the next 10 years B. Documented process and milestone plan for development of the FY 2018-2022 Agency Strategic Plan C. Draft version of agency goals and objectives in accordance to Circular A-11	Deliverables A. and B. – Within 45 days of task order start  Deliverable C. – Within 90 days of task order start
Task 2	A. Contractor shall provide high-level requirements to guide OCSO in translating stakeholder requirements into key skills and products; B. Contractor shall provide a recommendation report on high-level roles and responsibilities that will support OCSO in most effectively meeting the needs of stakeholders	Within 45 days of task order start
Task 3	A. Contractor shall provide documented recommendations on the purpose and scope for governance of OCSO, including the	Within 90 days of task order start



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	<p>optimal structure and use of the existing Executive Vision Council (EVC)</p> <p>B. Contractor shall conduct and co-facilitate engagement sessions with the new governance group and other designated groups to guide and promote strategy development and implementation</p>	
Task 4	<p>A. Contractor shall create a report summarizing skills needed to independently facilitate ongoing strategy development and implementation within the Agency.</p> <p>B. Contractor shall document training for key staff on facilitation of strategy development and implementation efforts. This is training material to support the advancement of skills needed to facilitate a strategic dialog with agency executives and stakeholders. It advances OCSO's ability to facilitate strategy sessions without the need of contractor assistance in the future.</p> <p>C. Contractor shall create a log of lessons learned for staff to reference for future strategy development and implementation efforts.</p>	Within 6 months of task order start
All Tasks	<p>A. Contractor shall record meeting minutes for meetings attended.</p> <p>B. Contractor shall provide Performance Report outlining meetings, deliverable status and work activities.</p>	<p>Deliverable A. – Within 24 hours of meeting</p> <p>Deliverable B. – Bi-weekly</p>

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**V. Period of Performance:**

Date of award through six months.

**VI. Skills Required:**

- Bachelors (Masters Preferred) in Organizational Management, Business Administration or related field
- Excellent written and communication skills
- Minimum of 6 years relevant experience
  - Strategic Direction and Vision
  - Program Management
  - Performance Management
  - Leading Change
  - Interacting with senior-level executives
- Knowledge of SSA's organizational structure and processes
- Previous experience working on SSA's critical 8 initiatives and priorities

**VII. Assumptions and Constraints:**

- Contractors are to complete work at SSA's main Woodlawn campus unless otherwise approved by the Program Manager or COR.
- Contractor must prepare written text deliverables in Microsoft Word format and provide electronically.
- The contractor must notify the Program Manager and COTR if at any time, of work delays or endangered deadlines for activities or deliverables.
- Need to be available during SSA core hours of 9:00am to 5:00pm in order to meet with OCSO staff.
- All deliverables are the sole property of OCSO and SSA and contractor may not share without the consent of OCSO.

**VIII. Accessible User Interface and Electronic Content Requirements**

The contractor shall ensure the following deliverables conform to the following content and user interface requirements:

Deliverable	Requirement
Any documentation that the Contractor provides, such as, but not limited to:	All documentation, reports, and training materials shall be accessible to people with disabilities.

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<ul style="list-style-type: none"><li>• Reports</li><li>• Training Materials</li></ul>	<ul style="list-style-type: none"><li>• Documentation, reports, and training materials shall be in accessible file formats, keyboard navigable (i.e. usable without the use of a mouse);</li><li>• All non-decorative images shall have textual descriptions that sufficiently describe the image for users with disabilities;</li><li>• Tables shall have programmatically associated row and column headers;</li><li>• Multi-media content shall be audio described and closed captioned, and audio only content shall be delivered with an associated written transcript.</li></ul>
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**IX. Payment Schedule**

The following payment schedule shall be followed:

Task	Milestone	Amount of Payment
Task 1	Completion of all activities in Task 1 and acceptance of all deliverables by the COTR.	15%
Task 2	Completion of all activities in Task 2 and acceptance of all deliverables by the COTR.	15%
Task 3	Completion of all activities in Task 3 and acceptance of all deliverables by the COTR.	15%

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Task 4	Completion of all activities in Task 4 and acceptance of all deliverables by the COTR.	15%
All Remaining Tasks	All remaining tasks consists of startup activities and monthly reporting. These tasks may be invoiced upon completion of the contract.	of total firm fixed price amount of task order. 40%

## **Improving Quality and Payment Accuracy for Our Customers**

### Office of Retirement and Disability Policy

December 5, 2016

The Improper Payment Oversight Board (IPOB) is a cross component group of Deputy and Assistant Deputy Commissioner across the enterprise, chaired by the Assistant Deputy Commissioner for Retirement and Disability Policy (ORDP). The IPOB leads the effort to improve quality and payment accuracy, focusing on strategies that address the root causes of improper payment.

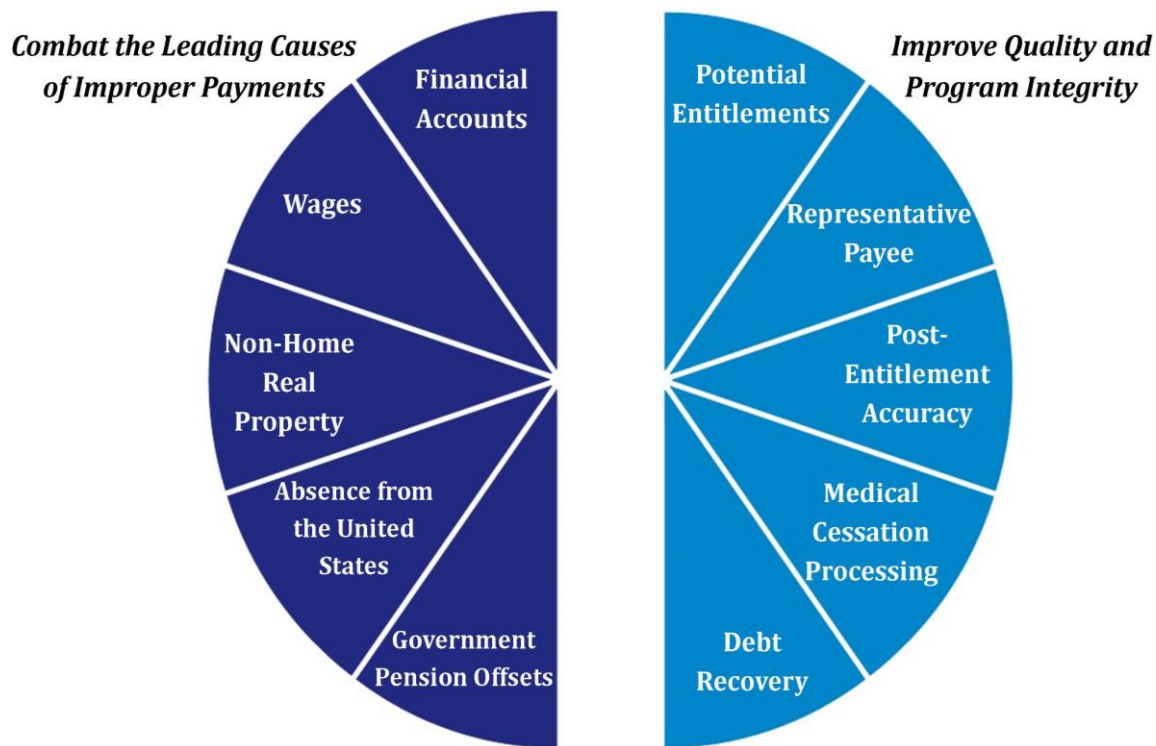
<b>FY15 Payment Accuracy Snapshot</b>		
	<b>Old-Age, Survivors, and Disability Insurance (OASDI)</b>	<b>Supplemental Security Income (SSI)</b>
<b>Beneficiaries/Recipients Paid</b>	60 million	8.3 million
<b>Benefits Paid</b>	\$853.7 billion	\$56.6 billion
<b>Overpayment Accuracy</b>	99.6%	* 93.9%
<b>Underpayment Accuracy</b>	99.3%	98.6%
<b>Improper Payments</b>	\$3.7 billion	\$4.2 billion
<p>* In FY15, SSA achieved our highest SSI accuracy rate in more than a decade.</p> <p>Despite this progress, much work remains. Even small error rates result in substantial improper payments because of the size of our programs. To reduce improper payments by one tenth of one percent, we need to prevent nearly \$57 million in improper payment. A similar improvement in OASDI payment accuracy requires a reduction of \$850 million in improper payments.</p>		

#### Key challenges:

- Reliance on beneficiaries to self-report information affecting their eligibility or entitlement;
- Statutory complexity of our programs, particularly the Supplemental Security Income (SSI) program where we pay benefits on the first day of the month, although changes may occur later in that month;
- Lack of readily available third party data that we can match to increase payment accuracy in some areas, including legal barriers that make it difficult to engage in direct data matching.

#### Key Strategies:

The cornerstone of SSA's program integrity efforts are medical continuing disability reviews (CDRs) and SSI redeterminations (RZ). Congress appropriates special funding each year for those workloads. As shown in the following chart, we have also identified 10 key initiatives to improve quality and payment accuracy. These strategies fall into two categories; 1) Combat the leading causes of Improper Payment, and 2) Improve Quality and Program Integrity.



### Combat the Leading Causes of Improper Payments

**Financial Accounts (avg. \$997 million per year in improper payments)** – Excess resources in financial accounts is the leading cause of SSI overpayments, representing nearly one-quarter of all SSI overpayment. The Access to Financial Institutions (AFI) process allows us to detect underreported or unreported accounts by searching financial institutions where individuals allege having accounts, as well as nearby institutions.

**Wages (avg. \$1.8 billion per year in improper payments)** – Wages (including work and earnings) is a leading cause of error in both the OASDI and SSI programs. We are implementing legislation to engage in direct data exchanges with commercial payroll providers and eliminate the dependency on self-reporting altogether. We expect this initiative will significantly reduce wage related payment errors.

**Non-Home Real Property (avg. \$262 million per year in improper payments)** – Undisclosed real property is a leading cause of improper payment in the SSI program. We are automating the search for real property data, using LexisNexis, into our SSI initial claims and redetermination processes to identify undisclosed property. This is another initiative to reduce our reliance on recipient self-reporting.

**Absence from the United States (avg. \$161 million per year in improper payments)** – We are studying arrival and departure data from the Department of Homeland Security to identify situations when beneficiaries leave the country for an extended period and are ineligible for benefits. If the study yields positive results, we will pursue a data exchange agreement with DHS for this purpose.

**Government Pension Offsets (avg. \$782 million per year in improper payments)** – Combined, Windfall Elimination Provision and Government Pension Offset are the leading cause of overpayments in the OASDI program. These are benefit reductions that apply to individuals who worked in non-covered employment (did

not pay Social Security taxes) and who receive a pension based on those non-covered earnings. We developed a Corrective Action Plan focusing on the pursuit of new data, enhanced automation, clearer policy instructions, and enhanced training.

### Improve Quality and Program Integrity

#### **Debt Recovery (FY 16 – collected \$3.3 billion in debt but established just over \$6.1 billion in new debt)**

Program debt continues to grow as we detect more in new debt than we collect from past overpayments. This is due to our aggressive program integrity work and some of the statutory and regulatory provisions that limit our ability to collect debt. We have a number of efforts underway to improve our internal and external debt collection efforts, including proposed legislation, automation and business process improvements.

#### **Post-Entitlement Accuracy (avg. \$2.72 billion per year in improper payments, largely overpayments) –**

This initiative consists of strategies to address error-prone and complex OASDI workloads in our Processing Centers and Field Offices. We are implementing targeted quality and audit recommendations along with corrective action plans that focus on policy, procedures and automation. NOTE: The dollar amount above is cumulative across several discrete categories of improper payment.

#### **Medical Cessation Processing (est. \$200 million per year) –**

When individuals receive disability benefits and we determine they are no longer eligible for those benefits due to medical improvement or certain work activity, we cease their benefits. When we do not timely process these medical cessations, particularly after individuals have exhausted all levels of appeal and benefit continuation, we continue to pay them erroneously, often for many years. We will improve our business process and automate manual processes that lead to error.

#### **Potential Entitlements (FY 16 - paid \$52 million in underpayments to nearly 35,000 beneficiaries)**

We identify, analyze, and take steps to prevent the recurrence of situations where the agency has failed to handle a claim or payment record appropriately, resulting in a missed entitlement. Each year, we identify specific workloads and take corrective action through policy simplifications, targeted mailings, automation, and other business process improvements.

#### **Representative Payees (quality issue – no dollar errors detected) –**

Studies find that we do not sufficiently document our determination that a beneficiary or recipient is incapable of managing or directing the management of his or her benefits, and therefore needs a representative payee. While documentation errors do not necessarily mean that we incorrectly appointed a representative payee or appointed the wrong payee, the studies revealed the need to improve our documentation of both evidence and our rationale. We are clarifying and streamlining policy, enhancing our electronic system to require documentation of these determinations, and delivering targeted training.



Social Security Administration

Real Property Efficiency Plan  
Reduce the Footprint Policy Implementation  
FY 2017- FY 2021

September 11, 2016

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## INTRODUCTION

The Social Security Administration (SSA) has a proven record of accomplishment in real property efficiency. Despite an increasing need for our services and our commitment to maintain a physical presence in local communities nationwide, we made great strides to do more with less space—our footprint is shrinking. We successfully met the mandates of the Freeze the Footprint (FTF) initiative. At the end of fiscal year (FY) 2015, our FTF portfolio consisted of 24,956,355 useable square feet (USF) acquired through occupancy agreements (OA) we have with the General Services Administration (GSA). Compared to our FY 2012 baseline, we reduced 1.41 million USF, or 5.3 percent.

We continue to maintain momentum in achieving real property efficiencies to comply with the new Reduce the Footprint (RTF) policy requirements. It is important to note that our baseline for RTF activities changed substantially due to recent space classification changes at GSA. We worked with the Office of Management and Budget (OMB) and GSA to reassess the previous predominant use codes contained within the Federal Real Property Profile (FRPP). GSA and OMB consulted with us and agreed that the classifications did not appropriately capture certain types of uses for space, and GSA decided to add new real property use categories. For example, we have large portions of space devoted to serving the public, including waiting rooms, interview stations, and other public amenities. GSA previously classified these areas as office space; however, under the new space classification types, GSA now designates these areas as public facing facilities. Since RTF only counts office and warehouse space, the change in real property use categories substantially altered our new baseline under the RTF policy. Because of this change, our FTF 2015 baseline was 24,956,355 USF; our new RTF 2015 baseline is 11,701,596 USF. Under FTF, we tracked approximately 1,500 occupancy agreements (OA); we are now tracking over 400 OAs for RTF.

Despite these changes, we continue to excel in real property efficiency. By the end of FY 2016, we expect to reduce our RTF portfolio by approximately 190,000 USF. We will achieve these reductions in part from a warehouse project that consolidates our outlying, leased warehouse space into our headquarters (federally owned) warehouse, representing a reduction of approximately 140,000 USF in warehouse space. In total, our RTF Plan calls for an additional 450,000 USF reduction in office space from FY 2017 through FY 2021.

We plan to use the following strategies to reduce our footprint further and increase real property efficiencies:

- Continue our centralized space acquisition approval process;
- Continue to apply space allocation standards (SAS) for all locations per our space standards policy;
- Pursue field and hearing office collocation opportunities when it makes business sense and does not adversely affect customer service; and
- Continue to phase in telework, which may present opportunities for future office space reductions.



We face a number of challenges in achieving additional portfolio efficiencies, including our community-based infrastructure to meet the need for face-to-face public service, and

- Appointing additional administrative law judges (ALJ) to help eliminate our hearings backlog;
- Implementing settlement agreement provisions between the agency and the Union signed in May 2015, which address ergonomic solutions and physical security enhancements in public reception areas;
- Negotiating every floorplan with our Unions, which may extend timelines for construction, and relocation dates. The Union negotiation periods vary based on many factors; and
- Exceeding FTF requirements and reducing our footprint beyond the 2012 baseline allows for fewer opportunities for further reductions.

### **Agency Summary**

We have approximately 65,000 Federal and 17,000 State employees who deliver services through a nationwide network of about 1,500 offices consisting of regional offices, field offices (including Social Security card centers), teleservice centers, processing centers, hearing offices (including satellite offices and national hearing centers), the Appeals Council, and our headquarters in Baltimore, Maryland.

Our field offices and Social Security card centers are the primary points of contact for in-person service with the public. Our teleservice centers primarily handle telephone calls to our National 800 Number.

Employees in our processing centers handle Social Security retirement, survivors, and disability payments, and perform a wide range of other functions, including answering telephone calls to our National 800 Number.

We have strong partnerships with our 54 State disability determination services and depend on their employees to make disability determinations. ALJs in our hearing offices and administrative appeals judges in our Appeals Council make decisions on appeals of Social Security and Supplemental Security Income decisions, including post-entitlement workloads and overpayments. The majority of our employees provide direct service to the public or support other employees that service the public.

Transition Team Member Document – Non-Public Information This document may only be disclosed to authorized Transition Team members

## PORTFOLIO STATUS

### Overall Agency Building Portfolio

Our FY 2015 RTF baseline shows that we occupy approximately 11.7 million USF in leased and federally owned buildings (not including data centers or public facing facilities). The agency obtains all space via OAs with GSA. We do not use tools, such as enhanced use lease authority, construction/purchase authority, or direct lease authority, to manage our portfolio.

We are responsible for administering critical programs that require direct contact with the public, and facilities located in areas that offer easy public access. Centrally locating our offices in a business district, access to public transportation, and our workload volumes all factor into deciding how many offices we need and the best location for each one. With the possibility of workload and population changes, it is better for us to locate offices in areas with the greatest need for our services. These areas often fall in locations without federally owned buildings, which contributes to our large number of leased facilities.

### FTF Reductions

Our USF calculation showed a slight increase leading up to the 2012 baseline set by the FTF policy. From 2011 to 2012, our portfolio increased by 714,016 USF. Since implementing FTF, we made great strides to change our trajectory, and our footprint began to shrink. From 2012 to 2015, we saw a decrease of 1.41 million USF, resulting in a net portfolio decrease of 696,882 USF for the previous five years. While there were increases in the beginning of the five-year period, we were able to reverse the trend and create a net reduction, surpassing the original FTF directive.

### Space Classification Code Changes

Due to changes in space classifications, GSA and OMB collaborated with us to change the predominant use code designation for many of our offices to “public facing” rather than “office” space. This change substantially revised our new baseline for RTF, which now only reflects office and warehouse space. The chart below shows the difference between our FTF baselines versus the new RTF baseline due to space classification code changes.

	Direct Leased Space	Federally Owned Space	Occupancy Agreement Space
<b>FY 2015 USF (FTF Baseline)</b>	0	0	24,956,355
<b>FY 2015 USF (RTF Baseline)</b>	0	0	11,701,596

We faced one major challenge when reclassifying our predominant use codes. Since a real property asset can have only one predominant use code, if we occupy a public facing office in the same building as another agency whose space is designated as “office” space, our portion of the facility must also be designated as office space. Due to this rule, some of our public facing facilities are included in our RTF baseline, even if we do not use the facility as office space.



**FY 2015 Portfolio Summary per FRPP Submittal**  
**(All Property, including the RTF Baseline Properties)**

	<b>Direct Lease Space</b>	<b>Owned Space</b>	<b>OA Space</b>
<b>Office</b>	<b>0</b>	<b>0</b>	<b>10,879,591</b>
<b>Warehouse</b>	<b>0</b>	<b>0</b>	<b>822,005</b>
<b>All Other</b>	<b>0</b>	<b>0</b>	<b>13,254,759</b>

**Status Relative to Freeze the Footprint Baseline Requirement**

As of September 30, 2015, our real estate FTF portfolio consisted of 1,555 buildings comprising approximately 25 million USF obtained via OAs through GSA. Of the 25 million USF, 18.2 million is leased space and 6.8 million is in federally owned space.

The chart below summarizes our FTF status and compares our FY 2015 actuals to our FY 2012 baseline totals. In comparison to our FY 2012 baseline, we decreased our USF by 5.3 percent and marginally increased our rent by 0.19 percent.

<b>Freeze the Footprint Status</b>		
<b>Fiscal Year</b>	<b>Useable Square Feet</b>	<b>Annual Rent Costs</b>
2012 (Baseline)	26,367,253	\$754,698,276
2015 (Actuals)	24,956,355	\$756,096,930
2015 Change from 2012	-5.3%	0.19%

Our total reduction from the FY 2012 FTF baseline by the end of FY 2015 was 1.41 million USF. We expect to reduce our portfolio by approximately 190,000 USF by the end of FY 2016, achieving a total reduction of 1.6 million USF and a 6 percent decrease overall from the original 2012 baseline. To reduce our real estate portfolio we:

- Combined headquarters leased facilities at our main campus;
- Disposed of our Metro West facility;
- Moved other headquarters leased space into a newly leased facility in Baltimore, MD;
- Relocated offices nationwide to conform to newly adapted SAS; and
- Furthered efforts to collocate our field and hearings operations, wherever possible. Collocating our operations allows us to maximize the use of our resources and reduce operating costs by sharing conference rooms, information technology support space, restrooms, reception areas, security guards, and equipment.

## CAPITAL PLANNING

Since April 2011, we have engaged GSA's Client Portfolio Planning (CPP) initiative to develop a strategic portfolio plan aimed at reducing overall portfolio occupancy expenses. CPP allows us to optimize our real estate, manage property assets, and continually identify opportunities to consolidate leases, achieve rent gap savings, and meet target reductions and goals. We meet regularly with GSA to improve our efforts to align our real property business goals, strategies, and priorities. To date, we identified CPP opportunities that can achieve \$12.3 million in annual rent savings and 701,000 in rentable square feet (RSF) reductions. This partnership allows us to follow the principals and guidelines for budget formulation and capital planning outlined in version 3.0 of OMB's Capital Programming Guide, a supplement to OMB Circular A-11.

## REDUCTION TARGETS

### Reduce the Footprint Reduction Targets for Office and Warehouse Space

To ensure we meet our annual reduction targets, the SRPO reviews and approves all space requests. To align with the President's budget process, we compile data from regional-level offices who report any moves, closures, relocations, and other space changes for the current year, plus two years into the future.

Since we do not have more than 200 warehouses in our portfolio, we are not required to set a warehouse reduction target. However, in our aggressive approach to meet the requirements of the FTF policy, we modified our business process to reduce both our warehouse portfolio and rent costs. In FY 2016, we completed a project that consolidated our outlying, leased warehouse space into our headquarters (federally owned) warehouse, which resulted in a reduction of approximately 140,000 USF in warehouse space.

Based on our national portfolio of expiring leases, we will apply our SAS to right size our facilities and further reduce our footprint as estimated in the table below. These estimates include all net planned reductions of office space included in our RTF baseline.

**Domestic Office and Warehouse USF Reduction Targets FY 2017-2021**  
(Rounded down to nearest five thousand)

	FY 2017	FY 2018	FY 2019	FY 2020	FY 2021	Total FYs 2017 - 2021
Office Target (Net USF Reduction)	15,000	75,000	15,000	35,000	310,000	450,000
Warehouse Targets (Net USF Reduction)	N/A	N/A	N/A	N/A	N/A	N/A



The attached *SSA Final RTF Template Sept 2016* spreadsheet provides details about the space changes shown in the table above. Many of our office moves are confidential; and, therefore, we do not track them publicly. Our estimated reduction in RTF includes significant projected savings from our offices in Dallas, Falls Church, and headquarters buildings located in Baltimore, MD and Washington, D.C., as well as our Security West facility in Woodlawn, MD. Our plan to reduce space is aggressive, and contingent upon an adequate agency budget to support the projects.

Beyond 2021, we are considering additional options to reduce our footprint. For instance, we are looking at consolidating leases at our headquarters location because we are renovating the Altmeyer building. In addition, we occupy the Frank Hagel Federal Building, a 388,140 USF building located in Richmond, CA and the Addabbo Federal Building, a 666,302 USF building located in Jamaica, NY. GSA is exploring opportunities for other tenants, including other Federal agencies, to optimize the space in both facilities, while ensuring our ability to protect the public's personally identifiable information (PII).

### Performance Benchmarks

We use the President's Management Agenda performance benchmarks and dashboard to help us identify and prioritize real estate projects. We also use internal and external databases to make data-driven decisions. These tools help us identify opportunities for real property efficiencies and improvements, and reduce the size of our inventory by prioritizing actions to collocate and dispose of unneeded properties.

For example, FedStat indicated we have a high utilization rate (UR) compared with other agencies, prompting us to review our space utilization and factors that influence our UR. We calculated approximate averages of public facing functions in our field offices and discovered that, on a relatively consistent basis, over one third of these spaces are dedicated to public use. Since the majority of our space is devoted to field offices serving the public, this accounted for the variance we saw between our UR and rates reported by other agencies. We discussed our space usage classifications with OMB and GSA and negotiated a better and more accurate way to measure our space utilization. Our discussions resulted in GSA revising its space classification codes to include a public facing category to accurately reflect our UR.

In May 2016, OMB and GSA provided a FedStat Summary document that identified 11 opportunities for potential space reductions based on high URs. Using the Benchmarking Initiative website, as well as the Asset Consolidation and Real Property Management tools available on the OMBMax portal website, we determined that a review of URs alone is not the only indicator of opportunities for space savings. Besides URs, we must also consider the office use (i.e., whether the office includes public facing space or special space such as Interactive Video Teletraining Studios). We will use these criteria to perform ongoing analysis of our portfolio to identify additional opportunities for reducing our real estate portfolio.

### Disposal Targets for Owned Buildings

We do not own any property.

### Maintenance of the Reduce the Footprint Baseline

OMB Memorandum 2013-02 states, “*On an annual basis, an agency shall not increase the size of its domestic real estate inventory, measured in square footage, for space predominately used for offices and warehouses.*” We complied with this requirement and decided to go a step further—we have been **reducing** our footprint since 2012. As of September 30, 2015, our real estate portfolio consisted of 1,555 buildings comprising approximately 25 million USF, of which 18.2 million is leased space and 6.8 million is Federal space. This is a decrease of 1,410,898 USF, or 5.3 percent, from our 2012 baseline.

In order to implement our plan to RTF beyond our new 2015 baseline, we will pursue several initiatives, including space negotiations with our Unions, Model Field Office proofs of concept, headquarters office space initiatives, and collocation opportunities.

### **Union Negotiations**

Listed below are initiatives regarding space standards and space sharing that involve Union negotiations.

- Pre-Decisional Involvement (PDI) for Space Standards – our Office of Disability Adjudication and Review (ODAR) began PDI with the Unions in January 2015 to discuss the entire Hearing Office Space Standards. We agree with the Union on the majority of the items, and our next step is to proceed with bargaining the hearing office space standards with the Unions.
- National Treasury Employees Union (NTEU) Space Sharing – the agency and NTEU reached an agreement on procedures for office sharing when an employee teleworks more than two days per week.
- American Federation of Government Employees (AFGE) Space Sharing – the agency and AFGE reached agreement on space sharing for employees who telework two or more days per week.

### **Model Offices**

We are working on several initiatives to test new field office models to improve office designs, while continuing to fulfill our duty to serve the public. In the Chicago and Philadelphia Regions, we are designing model field offices to explore alternate options for serving the public beyond the standard field office model. These offices will create an environment for field offices to test emerging technologies and employ new furniture and office designs, as well as new and improved service delivery methods. We expect to complete these projects in FY 2017.

The Philadelphia and Chicago Model Field Offices are both still proofs of concept, and if proven successful, these designs could result in increased efficiency in other offices in the future. While the design models would generally apply to field offices, which are public facing space, many of our field offices are located in buildings designated as predominantly office space, meaning that there could be tangible benefits to our RTF plan.



## **Headquarters Campus Initiatives**

In addition to other initiatives, we are pursuing other model space initiatives at our headquarters campus. These are pilot programs that require further vetting with stakeholders, including the Unions, before broader implementation.

We are currently renovating nearly 17,000 square feet of space for a component with approximately 140 employees. All of the employees are non-bargaining, which allows us to deviate from our large-site space standard. The floor plan includes multiple meeting space types and smaller offices and workstations, yielding a utilization rate of 125 USF/person. We completed the new space in June 2016.

We are in the midst of designing a pilot “hoteling” space with smaller workspaces as compared to the large site space standard. The pilot space will house 55 staff in 3,550 square feet (120 USF/person). The project is currently in the design phase. The concept will offer locked personal storage, workstations with lower panels, open collaboration spaces, and enclosed private meeting spaces.

## **IRS Collocation Opportunity**

We are in the initial phases of development with the Internal Revenue Services (IRS) about a proposed SSA/IRS collocation that would provide the public with access to both SSA and IRS services at the same location. We are having ongoing discussions to establish potential pilot locations to house small Taxpayer Assistance Centers, with one to four IRS employees, within SSA space. We would see a reduction in guard and rent costs, and a decrease in our physical footprint because of the reduction of space in the scope of our OA.

## **Reported Projects Status**

SSA’s 2015 RTF submission included three projects with planned reductions to office and warehouse space that we could track publicly. The projects included the closing of our Preston Gateway Warehouse, the collocation of our Saddlebrook, NJ teleservice center (TSC) with our Hackensack, NJ field office, and the reconfiguration and reduction of space in our Hartford, CT field office.

The first facility for public tracking is our Preston Gateway Warehouse in Hanover, MD. We consolidated our headquarters warehouse space and successfully closed our outlying warehouse in November 2015, saving approximately 140,000 USF. The second facility for public tracking is our Saddlebrook TSC. To better utilize agency space, we collocated the TSC with the Hackensack, NJ field office on December 4, 2015, saving the agency 12,213 USF.

The final facility submitted for tracking is our Hartford, CT field office. Since the last submission, GSA conducted a cost analysis and noted there would be significant savings in moving this office into a Federal facility. Since this is a public facing facility, GSA re-categorized and removed the facility from our current RTF plan. However, once the office moves into another Federal facility, it is likely that the office will be re-categorized back to office space (depending upon the predominant use code of the other occupying agency) and may be returned to our RTF list. The projected move for this office is in FY 2019.



### Space Design Standard for Future Reductions

In April 2012, we implemented a space design standard, known as the revised SAS, for both field offices and large facilities, which reduced the amount of space we request from GSA. Our SAS policies ensure consistency in space requirements submitted to GSA across regions and from one office to another. Our design standard incorporates the office space design standard of 200 USF per person (employees and contractors) for all non-public contact space as an achievable target goal for future space actions. As of August 2016, we have fully integrated the space design standard of 200 USF into the agency's internal policy and documented it via our Administrative Instructions Manual System, which is accessible to all employees on our intranet.

The 2012 field office SAS establishes the size of individual field offices based on current staffing levels. As technology changes the way we do business, we recognize that we can do the same job with less space. Thus, the field office SAS takes into account changes in technology and workflows and provides reduced space requirements for personnel and support areas. For example, since we began using electronic storage, the standard provides less storage space for paper files. We anticipate that continued virtualization of data will further reduce storage needs for both paper files and data equipment. The field office SAS requires efficient space planning for employee workspaces and support space.

The agency's initiative to test new model field offices supports this effort. Our offices will incorporate new, GSA-influenced furniture and office designs. Our offices will also incorporate new service delivery methods, such as self-help kiosks, to reduce face-to-face interaction and traffic in offices.

The revised field office SAS also reflects improvements in employee safety and service to the public. Our SAS for newly occupied field office space requires the construction of a barrier wall to separate public areas from employee areas. If we renew a lease for existing space, we require tenant improvements to add a barrier wall and to address other employee security requirements. In addition, we must increase space in reception areas to meet the needs of the public, including protecting their PII. We recently enhanced our reception areas to include larger interviewing areas for the public with increased acoustical properties to ensure that we provide maximum protection of our claimant's PII. Although the areas for the public are larger, we will reduce our footprint through FY 2021.

Our revised SAS for large facilities applies to all of our headquarters facilities, including the main complex in Woodlawn, MD; the ODAR operation in Falls Church, VA; our 10 regional offices; program service centers; and mega-teleservice centers. To optimize utilization, the revised standard reduced office sizes and redefined support spaces, such as computer equipment rooms and circulation space. For our larger facilities, we will focus on conforming to an all-in design standard of 200 USF per workstation on prospectus projects moving forward.

### **CLIMATE RESILIENCY**

We maintain and publish a *Strategic Sustainability Performance Plan*, which provides our agency with a structured, systematic approach for managing environmental and regulatory responsibilities to continuously improve overall environmental stewardship. The most recent plan includes a goal (#10) that addresses Climate Change Resiliency. This goal specifically states that, "While the



scope, severity, and pace of future climate change are difficult to predict, it is clear that potential changes could have important effects on our operations and programs.” Through climate adaptation planning, we are identifying how climate change is likely to affect our ability to achieve our mission, operate our facilities, and meet our policy and program objectives. We are working to improve our resiliency by tapping into inter-agency Federal government initiatives to improve the accessibility and coordination of climate change science for decision making, and continue to coordinate with GSA’s climate change adaptation efforts. We are building resiliency into our policies and procedures by continuing our review of existing emergency contingency plans and workforce protocols and policies, and incorporating climate change considerations into them as needed.

## **COMPLIANCE AND INTERNAL CONTROLS**

In FY 2012, we modified delegations of space acquisition authority from our 10 regional offices to a single signatory for all requests for space. Consequently, our SRPO must review and approve all requests for space prior to submission to GSA. We established a headquarters-based team to work with our regional offices and GSA to monitor the increases and decreases in office and warehouse space. This centralized process allows us to: (1) closely monitor our real estate portfolio against the established baseline; (2) consider collocation opportunities, where possible; (3) prioritize legitimate competing space requests across our portfolio, based on business case justifications, cost benefit analysis, and planning needs; and (4) ensure compliance with our space standards to support efficient space use.

We currently use a SharePoint site to manage all space requests. The process for evaluating space requests includes the following tasks:

1. OFSM provides our regional counterparts with a list of leases expiring in the next 36-40 months to ensure we submit requirements to GSA in a timely manner. Approximately three years before a lease or OA expires, a regional representative prepares a space request package and submits it electronically to OFSM.
2. The space request package includes a space computation worksheet based upon the appropriate SAS, information related to the current OA, and pertinent background information.
3. An OFSM analyst reviews the space request package for SAS compliance and evaluates the impact of the request on our real property footprint, including our best business case and cost benefit analysis.
4. The analyst makes a recommendation to, and requests approval from, the SRPO.
5. With SRPO approval, the OFSM analyst submits the request for space to GSA.
6. OFSM analysts continue to monitor the space acquisition process to ensure regional and GSA actions conform to our standards and appropriate approvals.

In addition to the process for evaluating space requests, we regularly request space acquisition data from the 10 regions in an effort to track upcoming projects. We compare the data to our headquarters database, as well as data obtained from GSA, to ensure we adequately capture all upcoming projects.



There are instances where it makes better business sense for us to deviate from the standard office space design requirement. Examples include an office that is over-sized for its current location per our SAS, but would cost the agency more to move the office than to pursue a new lease in the current location. To determine the best course of action, we perform a standardized cost benefit analysis during the initial space request process prior to sending it to the SRPO for approval. Our analysis helps to ensure we are making the best use of Government funds.

We conduct annual reviews of field offices to assess service delivery and determine if any changes are necessary to serve the public more effectively. Our reviews consider projected changes in workloads, local populations, demographic trends, and area-specific factors that may affect staffing and service levels. The focus of the reviews is to align anticipated staffing growth rates with workload and population trends.

Although our continued presence is necessary in numerous locations across the country, we are making concerted efforts to restrain real property growth. We evaluate potential collocations and pursue them where it makes good business sense and does not adversely affect customer service. In addition, we work hard to avoid lease overlaps (i.e., double rent) when moving an office from one location to another. We continue to work with GSA to investigate potential collocations with other Federal agencies. This pairing would work particularly well with agencies that have public facing needs. Collocating would allow us to share amenities, such as reception areas, restroom facilities, back end office areas, and security functions, while serving the public at a single, rather than multiple, locations.

During FY 2014, we created several custom reports and spreadsheets to monitor and track our domestic office and warehouse increases and offsets. These tools have allowed us to maintain better control of our portfolio.

In FY 2014, we also completed negotiations with our Unions to implement an expanded telework policy for employees. We are currently phasing in the telework expansion, depending on the unique needs and business requirements of each component. We expect an increase in telework as the agency adopts the policy more broadly. As more employees begin to telework more than two days per week, we can explore desk-sharing arrangements (also known as hoteling). We will continue to monitor our telework practices to look for opportunities to utilize our space more efficiently.

## **FRPP DATA QUALITY IMPROVEMENT**

Since we obtain all of our real property through GSA via OAs, we are not required to report directly to the FRPP. We work with GSA to verify our data before GSA submits the OA directly to the FRPP.

## **CHALLENGES AND IMPROVEMENT PRIORITIES**

One of our main challenges in following the new RTF policy results from the aggressive reduction of space we instituted at the onset of the FTF policy. When OMB implemented FTF, we reviewed our office space and created a successful plan to combine many of the outlying, leased headquarters buildings into federally owned campus buildings. This effort, and numerous other space actions nationwide, allowed us to reduce our footprint by 1,410,898 USF compared to our FY 2012 baseline, which represents a 5.3 percent reduction in our portfolio. Considering that we



made a significant decrease on the forefront of the real estate reduction initiative, further reductions to the new 2015 RTF baseline will be more difficult to achieve.

Hiring new ALJs to help eliminate our hearings backlog may cause a temporary increase in our footprint. Our success in this mission critical effort hinges on these hires.

Another challenge comes from our community-based infrastructure and the need to serve the public in-person. While technology and online services are part of our focus in reaching the public, we still require a physical presence across the country to offer face-to-face services. Due to the continuing need to serve the public face-to-face, our agency has a relatively high space UR. Our FY 2014 benchmarking data indicated that our agency had a UR of 382 USF per occupant. During FY 2014, we were approximately 44 percent above the median. We have over 1,200 field office sites and over 160 hearings office sites, which represents a large majority of our footprint. These offices require public space, which increases our overall USF per person as an agency. Our larger sites do not have the same public space requirements and, therefore, do not face the same UR challenges, but represent a much smaller fraction of our footprint.

With the addition of the new predominant use code in GSA's data dictionary, we re-categorized our offices that serve the public to the new "public facing facility" predominant use code. With this change, our preliminary RTF FY 2015 baseline numbers in the benchmarking submission show an office space only UR of 301 and a total baseline UR of 321 (including warehouse space). While this change does show our UR in a more accurate manner for our office space, there are still many public facing facilities counted as office space in our RTF baseline. These facilities still cause some deviations to our UR.

When revising any of our office space policies or design standards, we must meet labor obligations with three separate Unions: AFGE, NTEU, and International Federation of Professional and Technical Engineers. Ensuring we collaborate appropriately with our labor partners adds to the timeline for implementing new space standards.

Despite the challenges mentioned above, we continue to focus on footprint reductions by optimizing opportunities as they become available. We plan to review properties and use lease expiration opportunities to right size our offices to conform to the revised SAS requirements. As the agency expands telework provisions, we will look for opportunities to begin instituting desk sharing as agreed upon in our Union telework agreement. Internally, we will continue to collocate offices throughout the country as they fit into our agency operating plans. Externally, we will continue to look for opportunities with other agencies in sharing space.

## ATTACHMENTS

As specified in OMB's most recent RTF guidance, attached is an Excel spreadsheet, *SSA Final RTF Template March 2016*, which shows our planned office and warehouse portfolio changes.

## AGENCY CERTIFICATION

The signatories below certify that the information in our FY 2017 through FY 2021 Real Property Efficiency Plan: Reduce the Footprint Policy Implementation is complete, accurate, and complies with existing policy.



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Chris Molander  
Senior Real Property Officer  
Associate Commissioner for Facilities  
and Supply Management  
Social Security Administration

September 11, 2016

Date

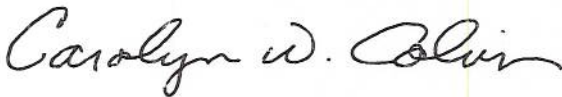


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Michelle King  
Acting Chief Financial Officer  
Acting Deputy Commissioner for Budget, Finance,  
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Social Security Administration

September 11, 2016

Date



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Carolyn W. Colvin  
Acting Commissioner  
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September 11, 2016

Date

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# February 3, 2014

**Director,  
Office of Strategic  
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Regina B. Smith**

**\*Acting**



# SSA IT MODERNIZATION

## Roadmap V3.0

Transition Team Member Document--Non-Public Information. This document may be disclosed to Authorized  
Transition Team Members only

# PROBLEM STATEMENT

- Little ability to leverage reduction in IT spend on legacy systems
- The cost of extending the legacy to support new legislation is exorbitant
- Expensive or impossible path to utilize modern tech fro the legacy base
- Legacy systems will not take advantage of new cyber-defenses
- Staff who can support legacy are retiring

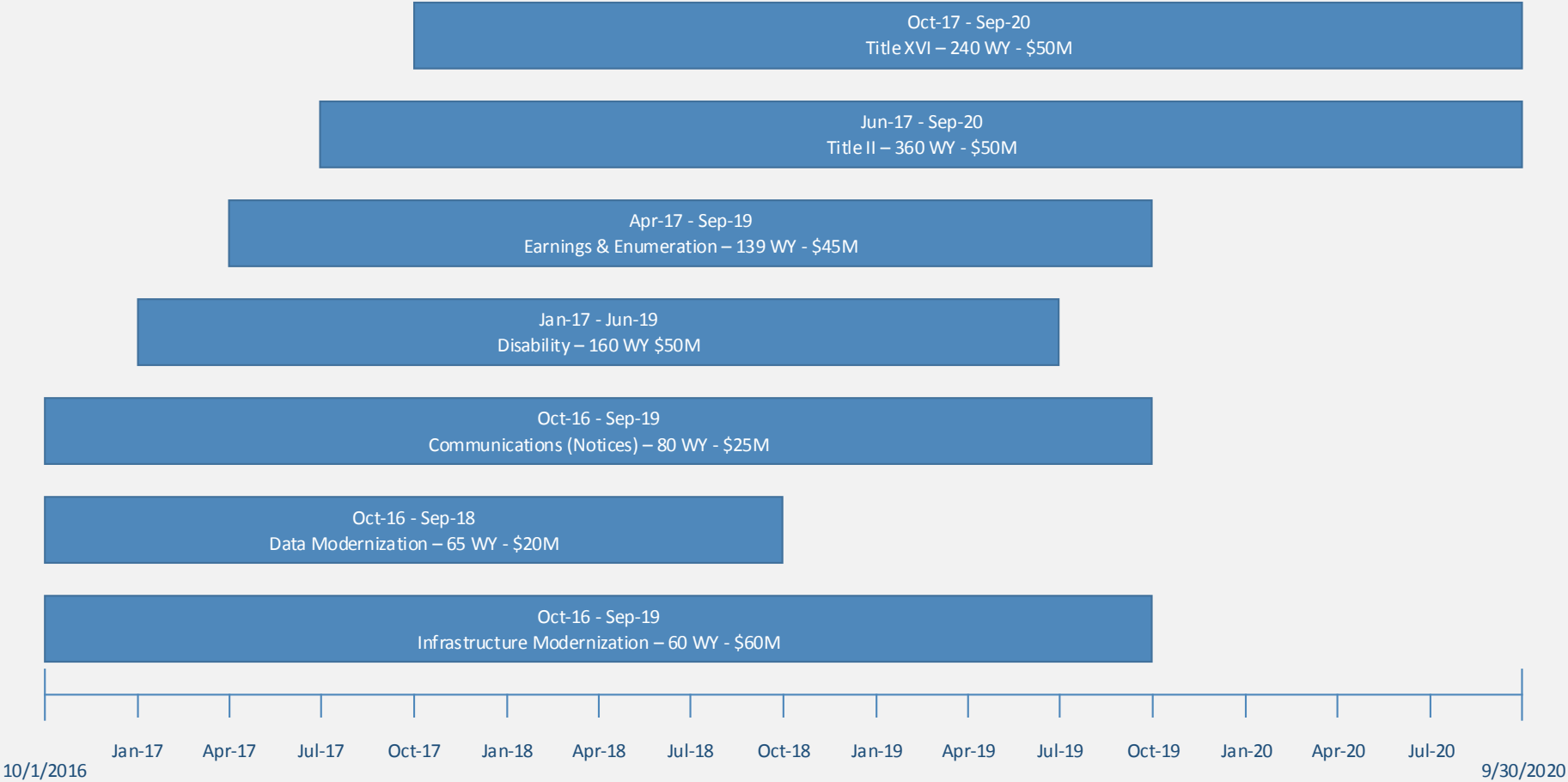
***This last bullet describes an existential threat... it makes modernization a requirement not a nice cost-cutting measure***

# PREP FOR MODERNIZATION

- Infrastructure
  - ACI Ready for Production
    - BPA in Place: AWS, Azure, SoftLayer...
    - EDW, DCPS2 going live
  - Approved plan for on-prem Cloud
- Technical Environment
  - MDE
  - Policies: 15 Factors, The Edicts...
- Progress
  - BORG, Notices, DCPS2
- Staff
  - Bootcamps
- Agency
  - Awareness before Commitment...



# ROADMAP & COST PROJECTIONS



# INFRASTRUCTURE MODERNIZATION: SHOVEL-READY & STARTED

- Public Cloud in Progress
  - ATO: Q1FY17
  - BPA: Any day now...
  - Two applications in product in Q2FY17
- Private Cloud
  - Plan due Q1FY17
  - Begin development Q2FY17
- Funding will accelerate migration of existing workload to the Cloud
  - Current LINUX & MSFT workloads
  - Mainframe JAVA/WebSphere Workloads based on Plan

## DATA MODERNIZATION: SHOVEL-READY & STARTED

- RI Production in Q2FY17
  - CEDB (was BORG) based on Customer
    - Numident, iAccomodate, Client integrated
  - EDW General Availability
    - Customer
    - MSCICS start in Q2FY17
- Funding required to ramp up modernization as the basis for Earnings
  - Data must be in place before code modernization

# DCPS2: STARTED

## STAFF BY ROLES

Role	Feds	Contractors
Mgmt & Admin	20	
Product Owner	17	
Architect	6	1
DBA	1	2
UX	2	5
Scrum Mstr	8	
Developer	14	30
Tester	9	2

## PROGRESS

- First Release This Month
  - Support for 2% of the Workload
- Modern Infrastructure
  - AWS, Javascript, Etc.
- Releases every Three Months
  - March: Support for 15% of the Workload
  - June: Support for 52% of the Workload
  - 100% in Q1 2018

**This is the basis for Modernization, the proof point, the leverage point for moving forward...**

# COMMUNICATIONS: SHOVEL-READY

## STAFF BY ROLES

Role	Feds	Contractors
Mgmt & Admin	20	
Product Owner	17	
Architect	6	1
DBA	1	2
UX	2	5
Scrum Mstr	8	
Developer	14	30
Tester	9	2

## STAFF RAMP UP

- Six month ramp
- Mgmt, Product, Architects first
- First Milestone in 3 months:
  - Backlog: Epics, RI User Stories, RI MVP
  - Technical Approach & Architecture
  - Through Line Defined

## DISABILITY: NEXT UP...

- Leverage success on DCPS2
- Assumption: 25% code reuse
- First Milestone in 12 months:
  - Backlog: Epics, RI User Stories, RI MVP
  - Technical Approach & Architecture
  - Through Line Defined
- Immediate pivot to advanced functionality
  - Advanced Support for Analyzing Medical Evidence
    - PoC Complete
  - Significant impact on productivity

# CONCLUSION

- Preparation is nearing completion
  - Actually it is ongoing...
- The Agency is coming on-board...
  - Commitment is academic without a budget...
  - Possible commitment to incremental funding...
- We need the funding
  - Incremental Funding will not allow us to catch up
  - \$300M Kick-start is in the President's Budget
  - H.R 6004 will help

Data Element	Type of Project	If Disposal Project	If Acquisition Project	Real Property Use	Owned, Leased or OA Asset	FRPP RPUID*	OA Number*	Size of Asset Acquired, Modified or Disposed (SF)	SF Unit of Measure	Net Portfolio Reduction (SF)	City	State/US Territory	Zip Code	Estimated Date Asset Will Leave Inventory	Estimated Date Agency Will Occupy New Space	Note/Comments:
NOTE:	(Dropdown box with choices of acquisition, disposal, modification of existing asset*)	Dropdown with demolition, lease or OA termination, lease or OA expiration, public benefit conveyance, transfer.	Drop down with new construction, purchase, OA, direct lease, transfer.	(Dropdown box with choices of office or warehouse)	Dropdown Owned, Leased or OA	Enter the ID	Enter the ID	Enter the Number of SF	(Dropdown box with choices of gross, rentable, or usable SF)	A decrease in SF should be reported as a negative number and an increase should be reported as a positive number.				Enter fiscal year (e.g., FY 2014)	Enter fiscal year (e.g., FY 2014)	
Port St. Lucie ODAR	Acquisition		OA	Office	OA	TBD	TBD	1,000	Usable Square Feet	1,000	Port St. Lucie	FL	TBD		FY 2017	ODAR new office
Port Orange ODAR	Acquisition		OA	Office	OA	TBD	TBD	1,000	Usable Square Feet	1,000	Port Orange	FL	TBD		FY 2017	ODAR new office
Perrine ODAR	Acquisition		OA	Office	OA	TBD	TBD	4,000	Usable Square Feet	4,000	Perrine	FL	TBD		FY 2017	ODAR new office
Queensbury ODAR	Acquisition		OA	Office	OA	NY7368	TBD	1,000	Usable Square Feet	1,000	Queensbury	NY	TBD		FY 2017	ODAR new office
Tri-Cities ODAR	Acquisition		OA	Office	OA	TBD	TBD	2,000	Usable Square Feet	2,000	Tri-Cities	WA	TBD		FY 2017	ODAR new office
Brooklyn ODAR	Acquisition		OA	Office	OA	TBD	TBD	3,200	Usable Square Feet	3,200	Brooklyn	NY	TBD		FY 2017	ODAR new office
Providence ODAR	Modification of Existing Asset			Office	OA	TBD	TBD	5,600	Usable Square Feet	(5,600)	Providence	RI	TBD	FY 2017		ODAR reduction
Boston OIG	Modification of Existing Asset			Office	OA	MA0131	AMA00068	3,500	Usable Square Feet	(3,500)	Boston	MA	02203-0002	FY 2017		OIG space reduction
Dallas OIG	Modification of Existing Asset			Office	OA	TX2291	ATX07657	1,000	Usable Square Feet	(1,000)	Dallas	TX	75202-5433	FY 2017		OIG space reduction
Des Moines OIG	Modification of Existing Asset			Office	OA	IA0112	AIA00983	1,400	Usable Square Feet	(1,400)	Des Moines	IA	50309-2115	FY 2017		OIG space reduction
Helena OIG	Modification of Existing Asset			Office	OA	MT5514	AMT02467	200	Usable Square Feet	(200)	Helena	MT	59601-9708	FY 2017		OIG space reduction
Saipan DCO	Modification of Existing Asset			Office	OA	MP7643	AMP00369	200	Usable Square Feet	200	Saipan	MP	96950-9997		FY 2017	DCO expansion
Utica DCO	Modification of Existing Asset			Office	OA	NY0218	ANY02057	2,500	Usable Square Feet	2,500	Utica	NY	13501-0000		FY 2017	DCO expansion
ADO 5 DCO	Disposal	Lease or OA termination		Office	OA	NJ5058	ANJ00106	4,300	Usable Square Feet	(4,300)	Hamilton Square	NJ	08691-3300	FY 2017		DCO relocation
Phoenix DCO	Modification of Existing Asset			Office	OA	AZ7134	AAZ00328	4,500	Usable Square Feet	(4,500)	Phoenix	AZ	85032-3441	FY 2017		DCO space reduction
Syracuse DCO	Modification of Existing Asset			Office	OA	NY0281	ANY08559	3,500	Usable Square Feet	(3,500)	Syracuse	NY	13261-6100	FY 2017		DCO space reduction
New Haven DCO	Modification of Existing Asset			Office	OA	CT0061	ACT00841	5,000	Usable Square Feet	(5,000)	New Haven	CT	06510-2022	FY 2017		DCO space reduction
Paterson DCO	Modification of Existing Asset			Office	OA	NJ0145	ANJ00060	700	Usable Square Feet	(700)	Paterson	NJ	07505-1961	FY 2017		DCO space reduction
Norwalk DCO	Modification of Existing Asset			Office	OA	CA8028	ACA02204	200	Usable Square Feet	(200)	Norwalk	CA	90650-3177	FY 2017		DCO space reduction
Portland ODAR	Disposal	Lease or OA termination		Office	OA	OR6485	AOR04154	1,600	Usable Square Feet	(1,600)	Portland	OR	97204-3440	FY 2018		ODAR relocation
Saint Paul OIG	Modification of Existing Asset			Office	OA	MN0087	AMN03588	1,400	Usable Square Feet	(1,400)	Saint Paul	MN	55101-1495	FY 2018		OIG space reduction
Creve Coeur OIG	Modification of Existing Asset			Office	OA	MO1907	AMO05495	3,400	Usable Square Feet	(3,400)	Creve Coeur	MO	63141-4404	FY 2018		OIG space reduction
San Diego DCO	Modification of Existing Asset			Office	OA	CA7377ZZ	ACA01879	5,700	Usable Square Feet	(5,700)	San Diego	CA	92101-3603	FY 2018		DCO space reduction
Parkersburg DCO	Disposal			Office	OA	AWV00138	AWV00138	4,200	Usable Square Feet	(4,200)	Parkersburg	WV	26101-5352	FY 2018		DCO relocation
El Cajon DCO	Modification of Existing Asset			Office	OA	CA7005ZZ	ACA07947	1,700	Usable Square Feet	(1,700)	El Cajon	CA	92020-2504	FY 2018		DCO space reduction
DC HQ	Modification of Existing Asset			Office	OA	DC0421 and DC0331	ADC05823 and ADC05824 and ADC07535	22,000	Usable Square Feet	(22,000)	Washington	DC	20024-2730	FY 2018		HQ space reduction
Dallas RO DCO	Modification of Existing Asset			Office	OA	TX2291	ATX01074 and ATX03529	35,000	Usable Square Feet	(35,000)	Dallas	TX	75202-5433	FY 2018		DCO space reduction
Iron Mountain HQ	Modification of Existing Asset			Office	OA	PA6385	APA00840	15,000	Useable Square Feet	(15,000)	Boyers	PA	16020-0006	FY 2019		HQ space reduction
ODAR HQ	Modification of Existing Asset			Office	OA	VA0301	AVA06619	35,000	Useable Square Feet	(35,000)	Falls Church	VA	22041-3260	FY 2020		ODAR HQ space reduction
Woodlawn HQ	Disposal	Lease or OA termination		Office	OA	MD1295	AMD00065	310,000	Usable Square Feet	(310,000)	Woodlawn	MD	21207-4009	FY 2021		HQ space reduction

\* Modification of existing asset -- e.g., renovation of an asset or partial demolition  
Transition Team Member Document . Non-Public Information This document may only be disclosed to authorized Transition Team members



## SSA Expert and Consultant Appointments Over the Past Five Years

### Appointments

Fiscal Year	Employee Count
2012	0
2013	3
2014	1
2015	4
2016	2
<b>Total</b>	<b>10</b>

### Extensions

Fiscal Year	Employee Count*
2012	12
2013	0
2014	1
2015	1
2016	4
<b>Total</b>	<b>18</b>

\* Conversion to Limited Appointment (Extension)

### Converted to Permanent Appointments

Fiscal Year	Employee Count
2012	0
2013	1
2014	0
2015	1
2016	0
2017	1
<b>Total</b>	<b>3</b>

### **SSA Employees by Bargaining Unit Status**

<u><b>Unions</b></u>	<u><b>SSA Employees</b></u>	<u><b>Contract Expiration Date All 4 Years Term</b></u>	<u><b>Employee Groups</b></u>	<u><b>Components</b></u>
<b>AFGE</b>	46,259	March 31, 2018 (Based on extension agreement signed Dec 14, 2016)	All except those listed below	All
<b>IFPTE</b>	1,457	September 2017	Judges	ODAR
<b>NTEU</b>	1,718	June 2018	Largely Attorney Advisors	ODAR
<b>Unrepresented</b>	566		Various	Various
<b>Non-Bargaining</b>	13,722		Management	All
<b>Total</b>	63,722			

American Federation of Government Employees (**AFGE**)

National Treasury Employees Union (**NTEU**)

International Federation of Professional and Technical Engineers (**IFPTE**)

Source: HRODS

12/01/16

**Transition Team Member Document--Non-Public Information. This document may be disclosed to only authorized Transition Team Members only.**



# SSA Budget Update & Background

Bonnie Kind  
Associate Commissioner  
Office of Budget

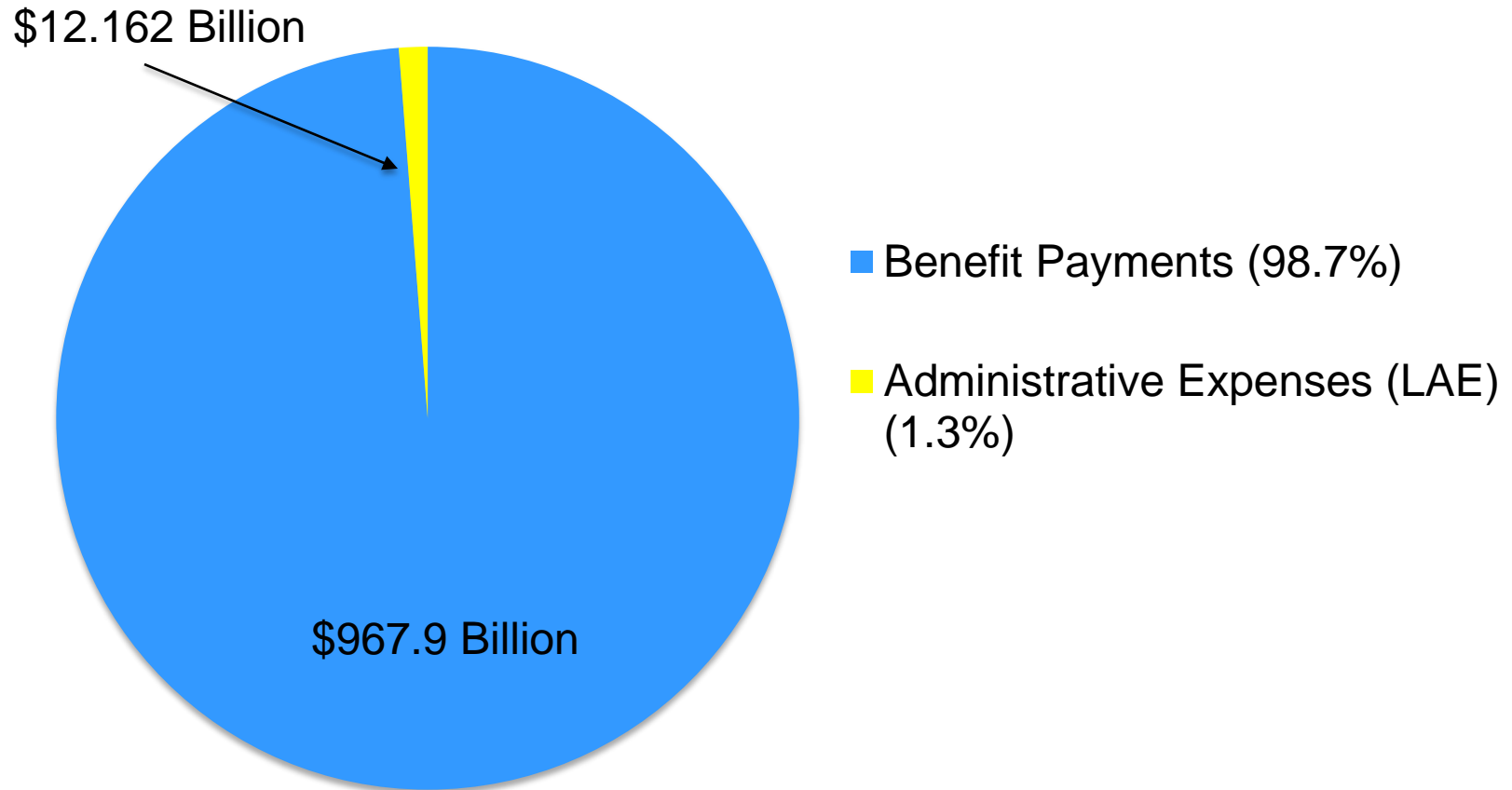
# SSA Overview

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- On average, over 68 million people receive benefits from Social Security each month.
- Social Security keeps 22 million people out of poverty each year by providing retirement, disability, and survivors benefits – benefits that were earned through their contributions while they worked and which provide critical income support in retirement or if they become disabled.
- Most of the agency's administrative costs are funded by these same worker contributions, but only to the extent that Congress appropriates the funds and allows SSA to spend the money.
- Beneficiaries expect a high level of service from SSA.

# Administrative v. Program Expenses

## FY 2016 Benefit and Administrative Expenses



# What We Do and How Many We Serve

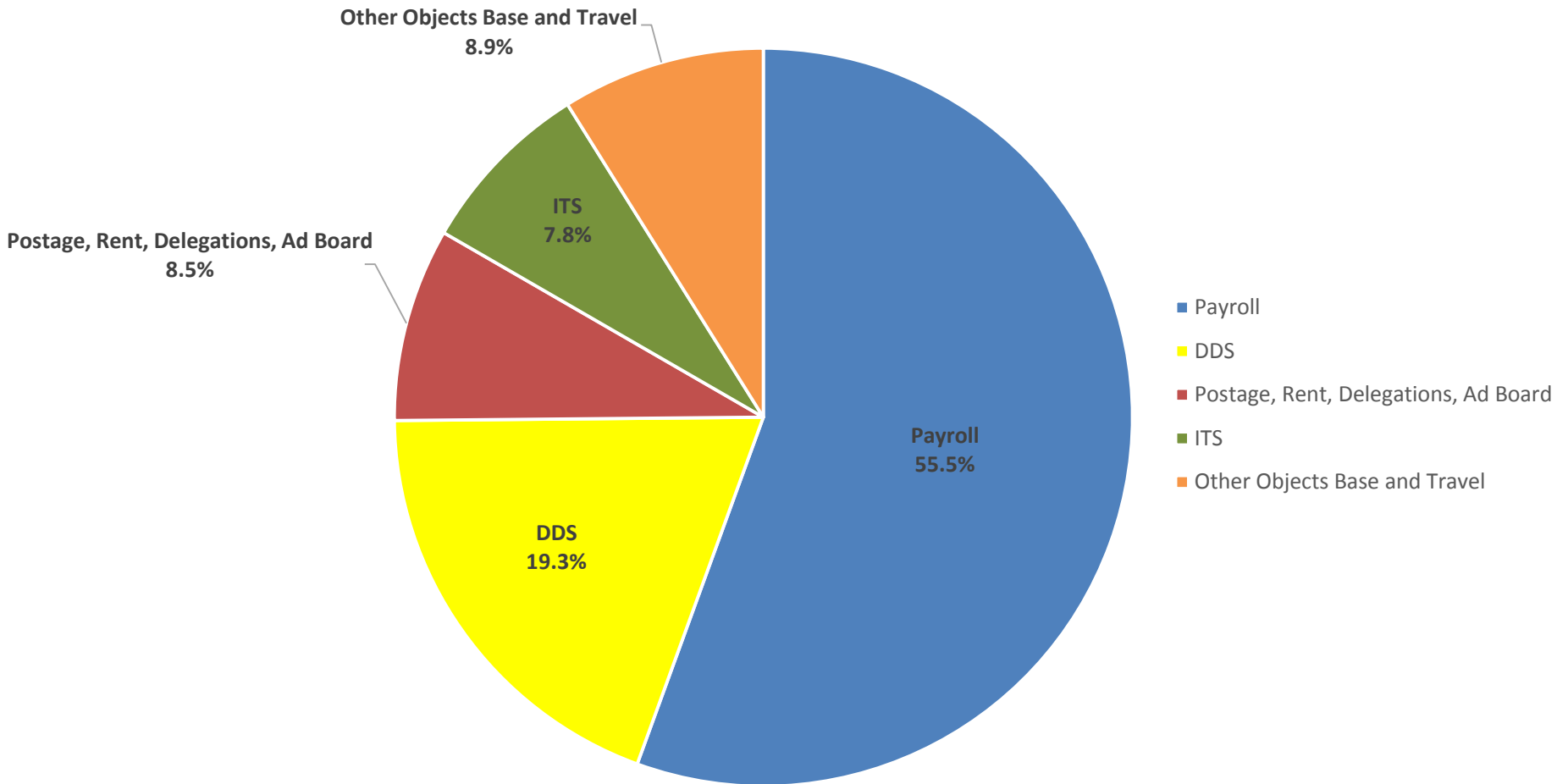
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Few government agencies touch as many lives as SSA does. For example, in FY 2016, we:

- Paid over \$960 billion to a monthly average of over 68 million beneficiaries;
- Handled approximately 37 million calls on our National 800 Number;
- Served more than 43 million visitors in over 1,200 field offices nationwide;
- Completed over 8.4 million claims for benefits and over 650,000 hearing dispositions;
- Handled more than 33 million changes to beneficiary records;
- Issued almost 17 million new and replacement Social Security cards;
- Posted about 273 million earnings reports to workers' records;
- Handled over 17,000 disability cases in Federal District Courts;
- Completed over 850,000 full medical Continuing Disability Reviews (CDR) to determine if disabled beneficiaries still meet the medical requirements for eligibility; and
- Completed over 2.57 million redeterminations of Supplemental Security Income (SSI) eligibility to ensure that recipients are still eligible for SSI and receiving the correct payment amount based on non-medical factors such as income, resources, and living arrangements.

# SSA's Budget: Major Spending Categories

FY 2016 Actual Spending (excluding reimbursables)



# SSA's Budget Challenges

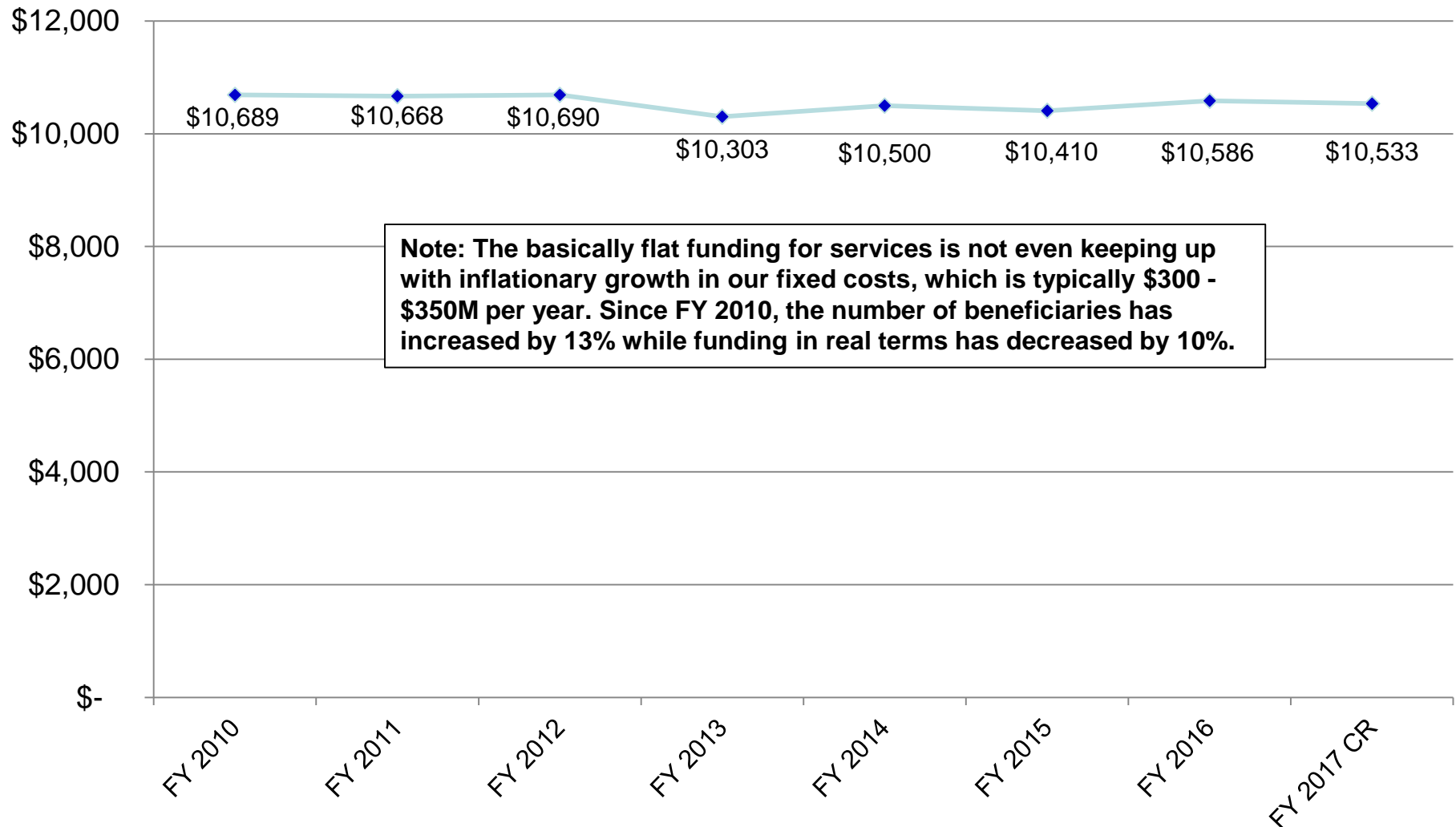
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- The agency's funding to support the administration of its programs has been reduced in recent years, resulting in increased wait times and backlogs.
- SSA's core operating budget has shrunk by 10% since FY 2010 after adjusting for inflation.
- While SSA's budget fell by 10%, the number of Social Security beneficiaries rose by 13% since FY 2010.
- The portion of SSA's budget dedicated to program integrity work\* has increased by 88% since FY 2010 while the portion of SSA's budget dedicated to serve the public has decreased.

\* Continuing Disability Reviews (CDR), SSI non-medical redeterminations, Cooperative Disability Investigation Units (CDI), and fraud prosecutions by Special Assistant United States Attorney (SAUSAs).



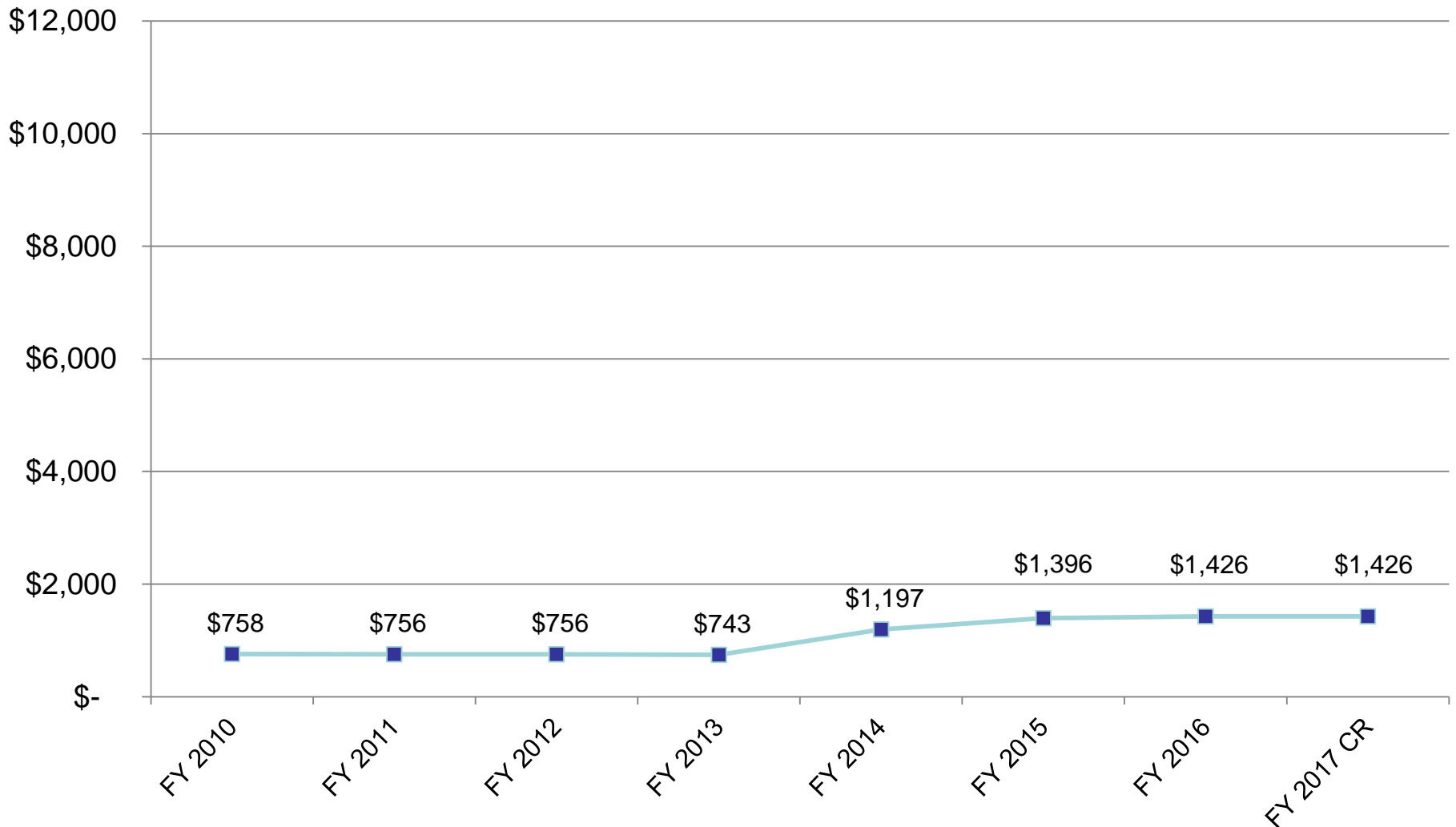
# Funding for Service (Operating Budget) <sup>1/</sup> (in Millions)



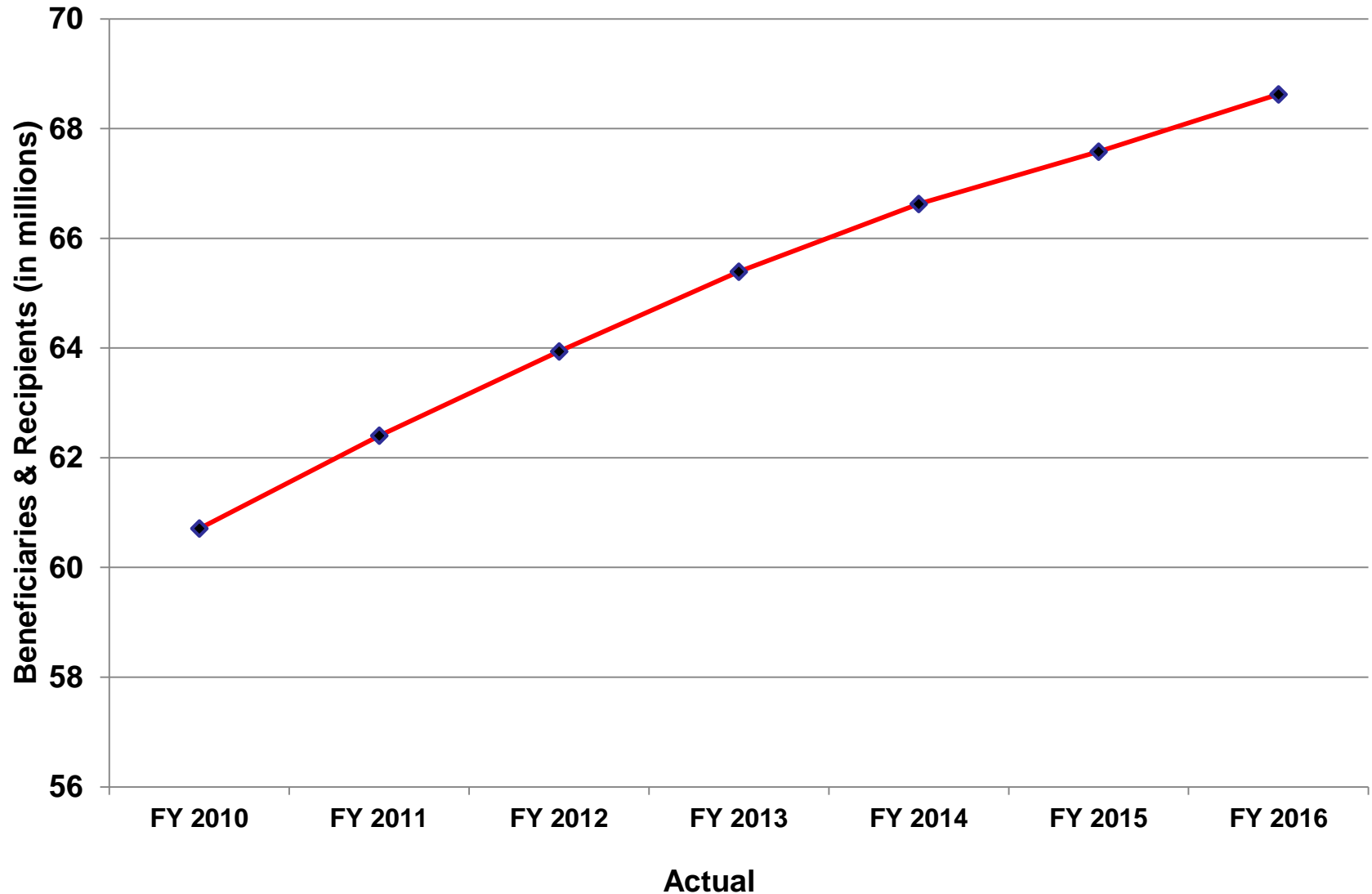
<sup>1/</sup> Funding for Service, i.e., operating budget, does not include funding for Program Integrity, the modernization of the Altmeyer building in FY 2016, ITS no-year, and funding for Recovery Act.

**Transition Team Member Document--Non-Public Information. This document may be disclosed to authorized Transition Team members only.**

# Funding for Program Integrity (PI) (in Millions)



# Beneficiaries & Recipients, FYs 2010-2016



# What We Have Done to Reduce Costs and Improve Efficiencies

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Some examples include:

- Improved automation – offering new and improved methods of service delivery;
- Business process changes;
- Greater reliance on data analytics;
- Policy simplification and updates;
- Closed more than 60 field offices and more than 500 mobile offices since 2010;
- Reduced the hours our offices are open to the public in order to complete our work as well as finish late-day interviews without overtime;
- Reduced the number of Social Security Statements issued; and
- Suspended lower priority notices.

# SSA's Major Challenges

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- Hearings Backlog
- Program Service Center (PSC) Backlog
- IT Modernization and Development
- National 800 Number Phone Service
- Field Office Wait Times
- Long Appointment Calendars

## Tough Choices under the Current CR (\$11.959 Billion, if Annualized)

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The current CR forced us to constrain every aspect of the budget, and we have delayed critical operational decisions until we receive full-year funding. We have:

- An agency-wide hiring freeze, resulting in even fewer people to serve the public;
- Extremely limited overtime for critical work processes, program integrity, health and safety, emergencies, and system upgrades. Our employees in the field need overtime to complete work that cannot be attended to during busy office hours as well as to complete late interviews;
- Restricted funding for all other costs, including mission-critical training and travel. Travel has been cut to an all-time low; and
- Information Technology Systems (ITS) funding at only \$914 million if annualized, which is nearly a 20% decrease from FY 2016 and about a 30% decrease from FYs 2014 and 2015. Our ITS budget helps us become more efficient and reduces our vulnerability to service disruptions on the frontlines.

We are doing everything we can to manage the agency with less funding. While we already are an efficient organization, we continue to look for ways to become more efficient.

# The FY 2017 President's Budget to Congress

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Our FY 2017 budget request of \$13.067 billion will allow us to rebound from our current situation, modernize our service delivery, and strengthen the integrity of our program. This funding level will allow us to:

- Improve frontline service to the public, such as reducing National 800 Number wait times and improving field office service;
- Implement the agency plan to eliminate the hearing backlog by increasing ALJ and support staff;
- Invest in alternative forms of service delivery to provide more convenient and efficient service, like click-to-chat and secure messaging through *my Social Security*;
- Expand our efforts to combat fraud, waste, and abuse by opening more Cooperative Disability Investigation (CDI) units; and
- Increase our program integrity work.

# What Happens if the CR is Extended?

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Funding levels under a CR for an extended period in FY 2017 will have a significant impact on both retirees and people with disabilities. If we have to operate at a rate below FY 2016 with built-in inflationary costs of about \$300 million:

- We would have to extend the full staffing freeze, causing hardship on the public;
- We will need to consider reducing field office hours and closing service locations;
- Wait times in our field offices and on our National 800 Number would rise significantly, and we would see our backlogs in our program service centers continue to grow. These delays could interrupt the timely issuance of benefit payments, as well as lead to increased overpayment debts to the government.
- We would not be able to fund our plan to reduce the disability hearings backlog, causing longer delays in benefits for many people who are counting on us.
  - Our hearings backlog was over 1.1 million disability claimants at the end of last year. On average, claimants were waiting almost 550 days for a decision on their disability hearing. Many of those waiting are in dire need of receiving disability benefits to pay for their medical care or for their basic needs and the needs of their families. These hardships are affecting our most vulnerable customers, including veterans, who are at an increased risk of homelessness and disability.
- We could be forced to suspend mailing Social Security Statements; and
- There would be no funding for future IT development or modernization to make us more efficient. Even worse, deep cuts in our IT funding could result in interruptions in service and loss of production on the front-line, causing further delays in service to the public.

It is also imperative that we receive timely full-year funding. For an organization as large as SSA, delaying major operational decisions because of an extended CR is a major setback.



# Request for Funding Exception Under a CR

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- SSA is currently under a CR, being funded at FY 2016 levels. The Administration is asking for a CR funding anomaly of \$157 million for SSA.
- An anomaly, which would specify an alternate rate of operations to the current CR law, would provide SSA with the funding we need to address our hearings backlog, which has grown to approximately 1.1 million claimants.
- The anomaly language and justification proposed by the Administration is as follows:

Sec. \_\_\_\_\_. Notwithstanding section 101, amounts are provided in the first paragraph of "Social Security Administration—Limitation on Administrative Expenses" at a rate for operations of \$10,755,945,000.

Language is needed to provide an additional \$157 million for the Office of Disability Adjudication and Review (ODAR) within the Social Security Administration (SSA), Limitation on Administrative Expenses account. The current backlog of appeals hearings within ODAR has grown to 1.2 million claimants, an all-time high, and almost 20,000 people died last year while waiting for their hearing. Consistent with the FY 2017 Budget request, funding is needed to hire an additional 250 Administrative Law Judges (ALJs) and associated support staff to address this backlog. Without the anomaly, ODAR would be unable to hire additional ALJs, as SSA has instituted an agency-wide hiring freeze under the current CR.

- Others may be considering a broader anomaly that includes increased funding for both service and program integrity.

# Conclusion

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- The level of service we provide is directly related to the funding we receive.
  - A growing share of our budget has been consumed by funds allocated for program integrity, while our core operating budget has not kept pace with the increase in the number of Social Security beneficiaries and SSI recipients.
  - Because of the rise in inflationary costs each year, costs that are largely out of our control, even level funding in FY 2017 would be a challenge for us and would lead to service degradation.
  - People pay into the Social Security trust funds throughout their lives, and they expect good service when they retire, become severely disabled, or lose a loved one. When we can't serve them in a timely manner, the impact on their lives can be devastating.
- The longer it takes us to get to our work, the greater the cost is to us and to the public. At some point, we must handle every claim that comes to us, every change of address, every direct deposit change, and every benefit adjustment. Funding us to keep up with the work is not only more cost efficient for us, but it also provides better service for the people who depend on us.

# Questions





**SOCIAL SECURITY**  
Office of the Chief Actuary

December 8, 2016

The Honorable Sam Johnson  
Subcommittee on Social Security  
Committee on Ways and Means  
United States House of Representatives  
Washington, D.C. 20515

Dear Chairman Johnson:

I am writing in response to your request for estimates of the financial effects on Social Security of H.R. 6489, the *Social Security Reform Act of 2016*, which you introduced today. The estimates provided here reflect the intermediate assumptions of the 2016 Trustees Report. This Bill (hereafter referred to as the proposal) includes fifteen provisions with direct effects on the Social Security Trust Funds. The estimates and analysis provided here reflect the combined effort of many in the Office of the Chief Actuary, but most particularly Karen Glenn, Christopher Chaplain, Daniel Nickerson, Kyle Burkhalter, Michael Clingman, Anna Kirjusina, Katie Sutton, and Tiffany Bosley.

The enclosed tables provide estimates of the effects of the fifteen provisions on the cost, income, and combined trust fund reserves for the Old Age, Survivors, and Disability Insurance (OASDI) program, as well as estimated effects on retired worker benefit levels for selected hypothetical workers. In addition, tables 1b and 1b.n provide estimates of the federal budget implications of the fifteen provisions. Assuming enactment of the plan, we estimate that the combined OASI and DI Trust Funds would be fully solvent (able to pay all scheduled benefits in full on a timely basis) throughout the 75-year projection period, under the intermediate assumptions of the 2016 Trustees Report. In addition, under this plan the OASDI program would meet the further conditions for sustainable solvency, because projected combined trust fund reserves would be growing as a percentage of the annual cost of the program at the end of the long-range period.

While we estimate that the provisions of this proposal would make the combined OASI and DI Trust Funds solvent throughout the 75-year projection period under the intermediate assumptions of the 2016 Trustees Report, the two trust funds are separate legal entities. Some modification of the allocation of the total payroll tax rate between the OASI Trust Fund and the DI Trust Fund might be necessary to ensure that both trust funds would remain solvent for the next 75 years under these assumptions.

The proposal includes fifteen basic provisions with direct effects on the OASDI program. The following list briefly identifies each provision:

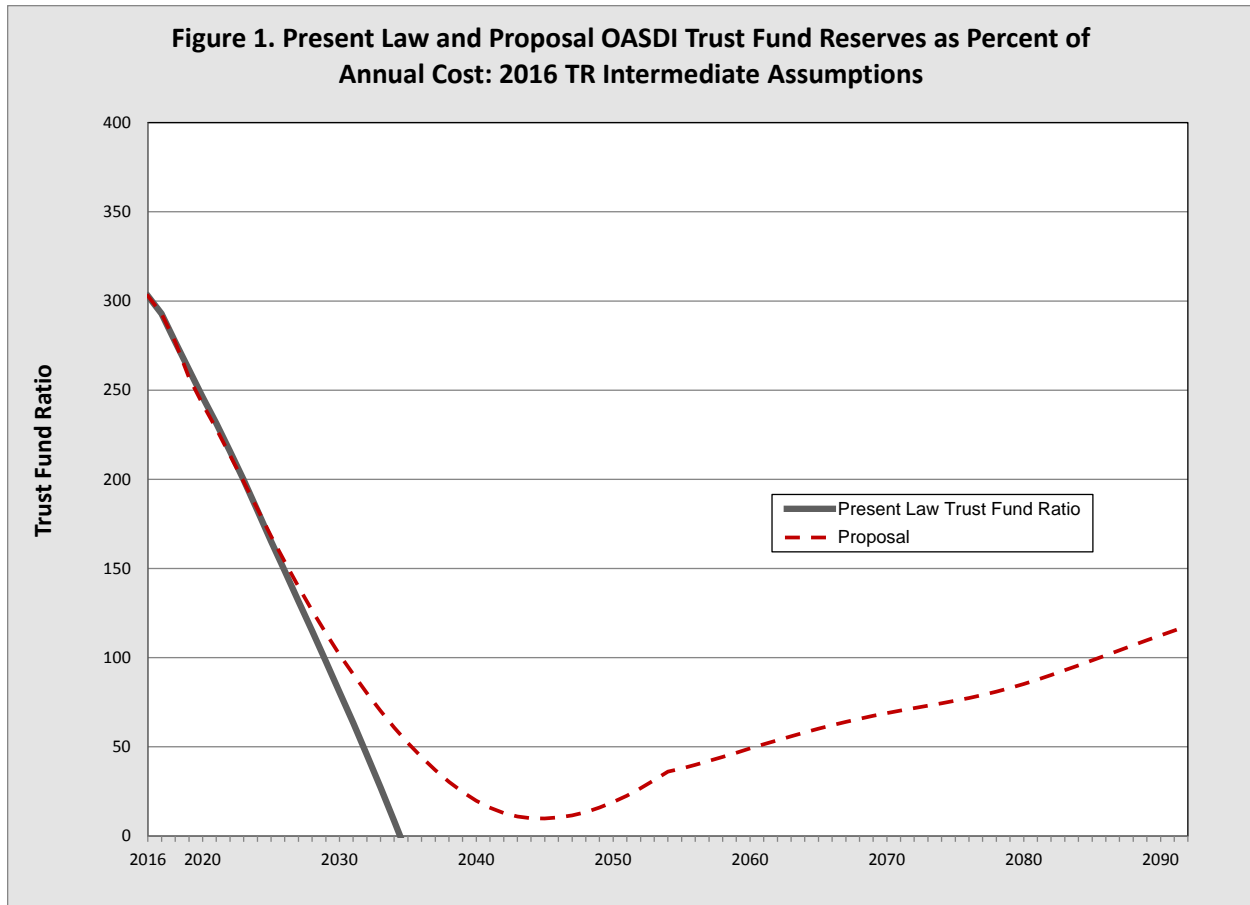
- 1) *For retired worker and disabled worker beneficiaries becoming initially eligible in January 2023 or later, phase in a new benefit formula (from 2023 to 2032). Replace the existing two PIA bend points with three new bend points and modified benefit formula factors.*
- 2) *Use an annualized “mini-PIA” formula beginning with retired and disabled worker beneficiaries becoming newly eligible in 2023, phased in over 10 years. The mini-PIA calculation would use a single year’s average monthly indexed earnings (mini-AIME) and primary insurance amount (mini-PIA) for each year with taxable earnings.*
- 3) *Replace the current-law Windfall Elimination Provision (WEP) with a new calculation for most OASI and DI benefits based on covered and non-covered earnings, phased in for beneficiaries becoming newly eligible in 2023 through 2032.*
- 4) *After the normal retirement age (NRA) reaches 67 for those attaining age 62 in 2022, increase the NRA by 3 months per year starting for those attaining age 62 in 2023 until it reaches 69 for those attaining age 62 in 2030. Increase the age up to which delayed retirement credits may be earned from 70 to 72 on the same schedule.*
- 5) *Beginning with the December 2018 COLA, provide no COLA for those with modified adjusted gross income (MAGI) above specific thresholds and compute the COLA using the chain-weighted version of the CPI-U (C-CPI-U) for all other beneficiaries.*
- 6) *For spouses and children of retired workers and disabled workers becoming newly eligible beginning in 2023 and phased in for 2023 through 2032, limit their auxiliary benefit to the amount based on one-half of the PIA of a hypothetical worker with earnings equal to the national average wage index (AWI) each year up to his or her eligibility year, and who has the same eligibility year as the worker.*
- 7) *Beginning in January 2019, require full time school enrollment as a condition of eligibility for child benefits at age 15 up to 18.*
- 8) *Provide a new minimum benefit for workers with more than 10 years of covered earnings above a specified level, phased in for retired and disabled worker beneficiaries becoming newly eligible in 2023 through 2032.*
- 9) *Beginning in January 2019, eliminate the retirement earnings test for all beneficiaries under NRA.*
- 10) *Eliminate federal income taxation of OASDI benefits that is credited to the OASI and DI Trust Funds for 2054 and later, phased in from 2045 to 2053.*
- 11) *Provide an option to split the 8-percent delayed retirement credit (DRC) to offer a lump sum benefit at initial entitlement equivalent to 2 of the 8 percent DRC earned, and a 6 percent DRC on subsequent monthly benefits, effective for workers attaining age 62 in 2023 and later.*

- 12) *Beginning in January 2023, provide an addition to monthly benefits for all beneficiaries who have been eligible for at least 20 years. The additional amount is calculated based on 5 percent of the PIA for a hypothetical worker with earnings equal to the national average wage index each year.*
- 13) *Beginning in January 2023, for new and current disabled widow(er) beneficiaries, change the requirement that disability must occur no later than 7 years after the worker's death, or after surviving spouse with child-in-care benefits were last payable, to no later than 10 years.*
- 14) *Beginning in January 2023, for new and current disabled surviving spouse beneficiaries, eliminate the requirement to be age 50 or older for receipt of benefits.*
- 15) *Beginning in January 2023, for new and current beneficiaries, waive the two-year duration of divorce requirement for divorced spouse benefit eligibility in cases where the worker (former spouse) remarries someone other than the claimant before the two-year period has elapsed.*

The balance of this letter provides a summary of the effects of the fifteen provisions on the actuarial status of the OASDI program, our understanding of the specifications and intent of each of the fifteen provisions, and descriptions of our detailed financial estimates for trust fund operations, benefit levels, and implications for the federal budget. See the “Specification for Provisions of the Proposal” section of this letter for a more detailed description of these fifteen provisions.

### **Summary of Effects of the Proposal on OASDI Actuarial Status**

Figure 1 illustrates the projected trust fund ratio through 2090 under present law and assuming enactment of the proposal. The trust fund ratio is defined as the combined Old-Age and Survivors Insurance (OASI) and Disability Insurance (DI) Trust Fund reserves expressed as a percent of annual program cost. Assuming enactment of the proposal, the combined OASI and DI Trust Funds would be fully solvent throughout the 75-year projection period, under the intermediate assumptions of the 2016 Trustees Report. In addition, because the projected trust fund ratio is increasing at the end of the period, the plan meets the conditions for sustainable solvency. It should be noted, however, that because the projected level of reserves reaches as low as 10 percent of annual program cost around 2045, unexpected fluctuations in the economy or other factors affecting program cost or revenue could require additional temporary measures to maintain solvency through this period.

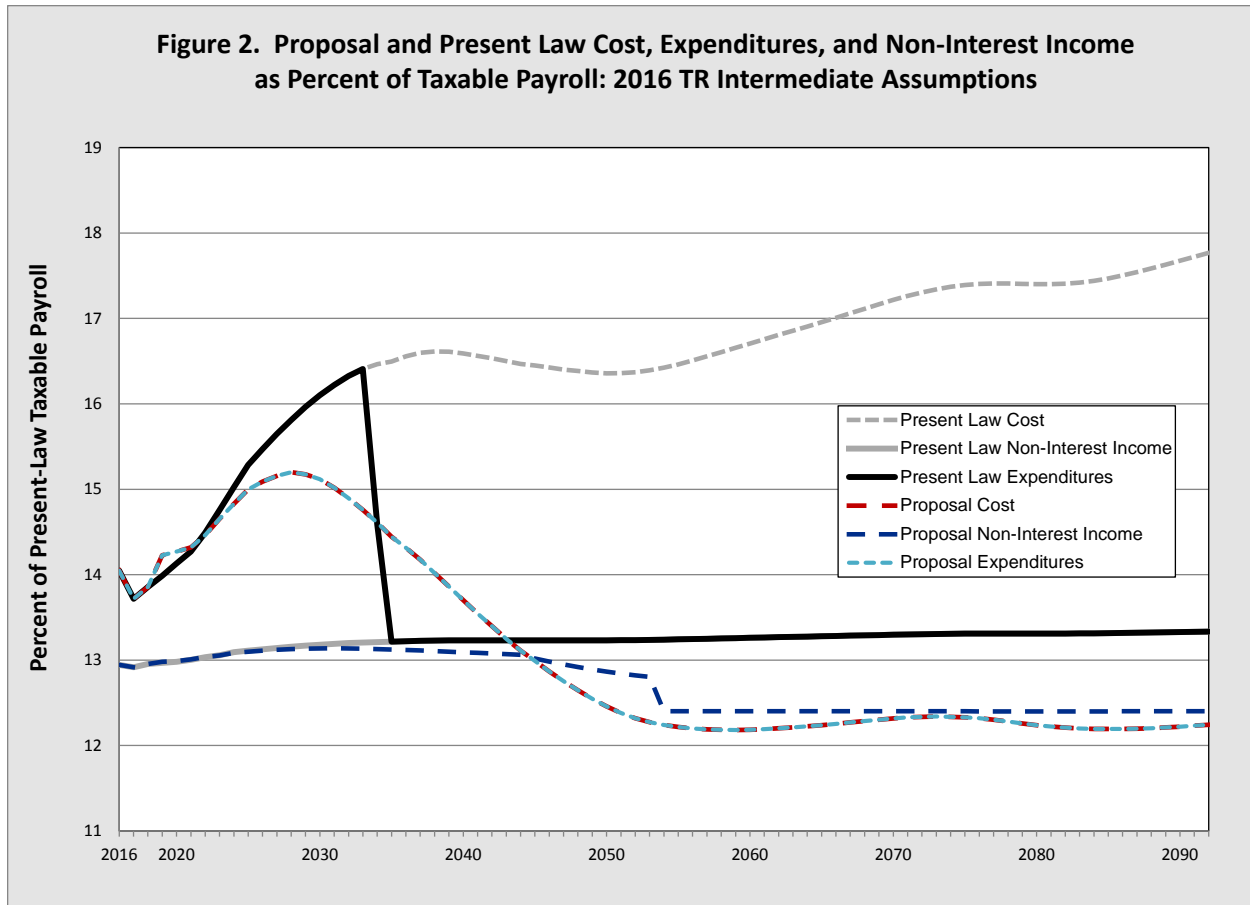


Note: *Trust Fund Ratio* for a given year is the ratio of reserves in the combined OASI and DI Trust Funds at the beginning of the year to the cost of the program for the year.

Under current law, 79 percent of scheduled benefits are projected to be payable on a timely basis in 2034 after depletion of the combined trust fund reserves, with the percentage payable declining to 74 percent for 2090. Under the plan, the OASDI program would be solvent throughout the 75-year projection period, and would have the ability to pay 100 percent of scheduled benefits on a timely basis for the foreseeable future.

Enactment of the fifteen provisions of this proposal would change the long-range OASDI actuarial deficit from 2.66 percent of taxable payroll under current law to a positive actuarial balance of 0.02 percent of payroll under the proposal.

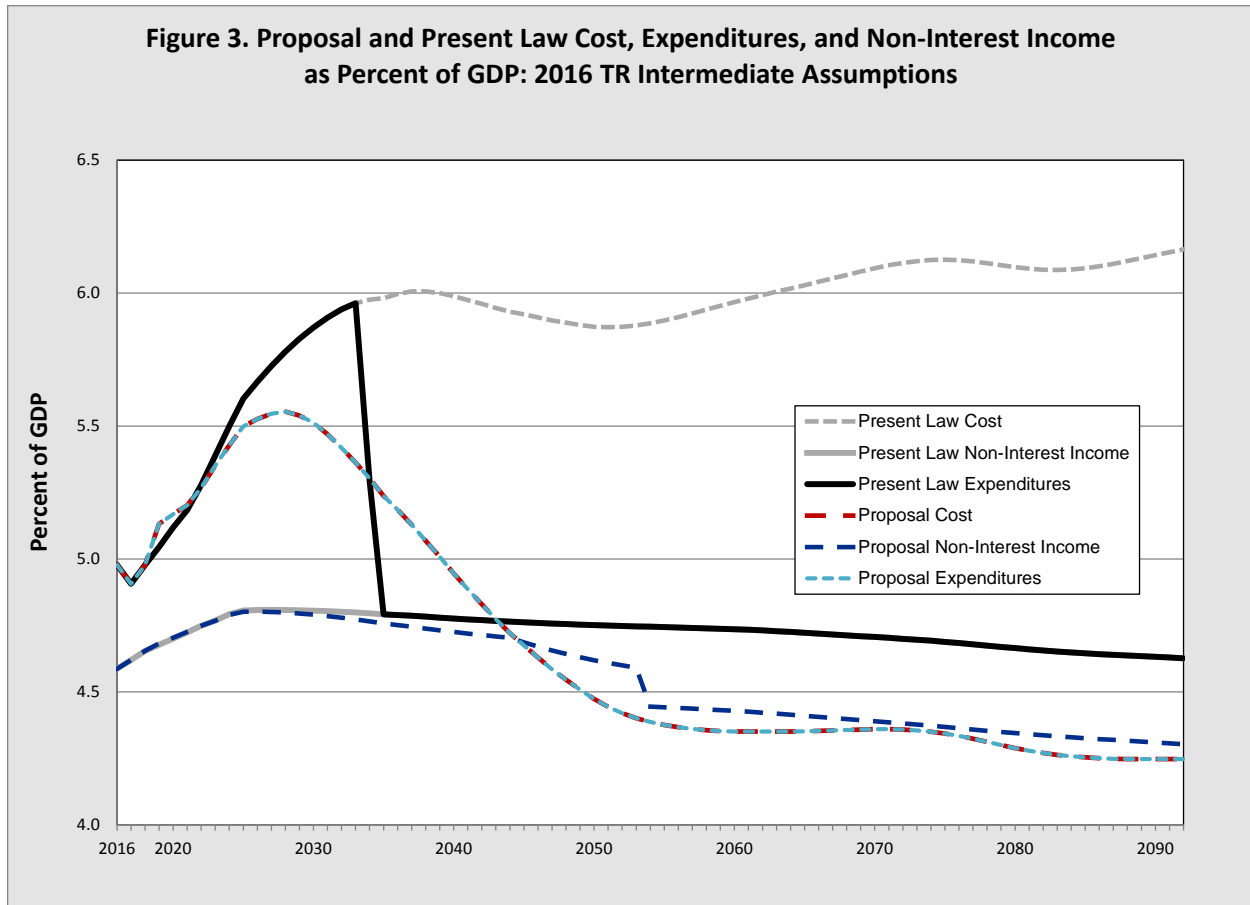
Figure 2 illustrates annual projected levels of cost, expenditures, and non-interest income as a percent of the current-law taxable payroll. The projected level of cost reflects the full cost of scheduled benefits under both current law and the proposal. Under the proposal, projected expenditures equal the full cost of scheduled benefits throughout the long-range period.



OASDI program annual cost under the proposal is higher than under current law, starting in 2019. This difference decreases and by 2022, annual cost under the proposal is lower than under current law. The reduction in cost grows quickly through 2055, reaching over 4 percent of current-law payroll, and then gradually, reaching about 5.5 percent of current-law payroll for 2090. Beginning in 2019, non-interest income under the proposal is projected to be slightly higher than under current law through 2022. For 2023 and later, non-interest income under the proposal is lower than under current law due to reduced and eventual elimination of revenue from income taxation of benefits, with the difference increasing to 0.9 percent of current-law payroll for 2090. The annual balance (non-interest income minus program cost) under the proposal is slightly worse (more negative) than under current law from 2019 through 2021. For 2022 and later, the proposal improves the annual balance.

It is also useful to consider the projected cost, expenditures, and income for the OASDI program expressed as a percentage of Gross Domestic Product (GDP). Figure 3 illustrates these levels under both current law and the proposal.





### **Specification for Provisions of the Proposal**

*1) For retired worker and disabled worker beneficiaries becoming initially eligible in January 2023 or later, phase in a new benefit formula (from 2023 to 2032). Replace the existing two PIA bend points with three new bend points and modified benefit formula factors.*

The three new bend points are at 25 percent, 100 percent, and 125 percent of one-twelfth the AWI from two years prior to initial eligibility. The new PIA factors are 95 percent, 27.5 percent, 5 percent, and 2 percent. During the phase-in, those becoming newly eligible for benefits will receive an increasing portion of their benefits based on the new formula, from 10 percent based on the new formula in 2023 to 100 percent based on the new formula for those becoming newly eligible in 2032 and later. This provision applies to all individuals receiving benefits on the account of a retired, disabled, or deceased worker. The new PIA formula would result in slightly higher benefit amounts for workers with average indexed earnings levels below 90 percent of the AWI, and lower benefit levels for those with higher average indexed earnings. Assuming enactment of this provision, we estimate that 51 percent of worker beneficiaries would have a higher PIA than under current law, and 49 percent would have a lower PIA.

We estimate that enactment of this provision alone would reduce the long-range OASDI actuarial deficit by 0.85 percent of taxable payroll and would reduce the annual deficit for the 75<sup>th</sup> projection year (2090) by 1.53 percent of payroll.

*2) Use an annualized “mini-PIA” formula beginning with retired and disabled worker beneficiaries becoming newly eligible in 2023, phased in over 10 years. The mini-PIA calculation would use a single year’s average monthly indexed earnings (mini-AIME) and primary insurance amount (mini-PIA) for each year with taxable earnings.*

For each year of earnings (indexed as under current law in a monthly equivalent form), for retired workers compute an individual PIA. Sum these individual PIAs for the 35 highest years and divide that total amount by 35 to get the PIA under this provision. For disabled and deceased workers, the number of highest mini-PIA years would equal the number of current-law benefit computation years. Phase-in over ten years, meaning that in 2023, 90 percent of the benefit would be based on the old PIA formula and 10 percent on the new mini-PIA formula, shifting by 10 percentage points each year until 100 percent is based on the new mini-PIA formula for becoming newly eligible in 2032 and later. This provision applies to all individuals receiving benefits on the account of a retired, disabled, or deceased worker.

We estimate that enactment of this provision alone would reduce the long-range OASDI actuarial deficit by 0.34 percent of taxable payroll and would reduce the annual deficit for the 75<sup>th</sup> projection year (2090) by 0.59 percent of payroll.

*3) Replace the current-law Windfall Elimination Provision (WEP) with a new calculation for most OASI and DI benefits based on covered and non-covered earnings, phased in for beneficiaries becoming newly eligible in 2023 through 2032.*

For this new approach, compute a PIA based on all past earnings (covered and non-covered), and multiply by the “non-covered earnings ratio.” This ratio is equal to the current-law concept of the average indexed monthly earnings computed without non-covered earnings divided by a modified average indexed monthly earnings that includes both covered and non-covered earnings in our records. Another way to describe the new approach is that beneficiaries will receive a benefit that reflects the replacement rate applicable for a worker with the same career earnings, where all earnings had been covered.

In the context of this overall proposal, the new approach under this provision would be applied for each individual year of earnings in order to compute modified mini-PIA amounts.

We estimate that enactment of this provision alone would reduce the long-range OASDI actuarial deficit by 0.03 percent of taxable payroll and would reduce the annual deficit for the 75<sup>th</sup> projection year (2090) by 0.05 percent of payroll.

*4) After the normal retirement age (NRA) reaches 67 for those attaining age 62 in 2022, increase the NRA by 3 months per year starting for those attaining age 62 in 2023 until it reaches 69 for those attaining age 62 in 2030. Increase the age up to which delayed retirement credits may be earned from 70 to 72 on the same schedule.*

As the NRA is increased, early entitlement for retired worker and aged spouse benefits may increase by as much as 2 years. The additional reduction to monthly benefits for early entitlement between 5 and 7 years will be at the rate of 4.5 percentage points per year (9/24 percentage point per month). For aged widow(er) benefits, the reduction of 28.5 percent will be retained for new entitlement at age 60 (as well as for disabled widow(er) benefits), and will be phased linearly as under current law to no reduction for age when newly entitled at NRA or above.

In addition to increasing the NRA, increase the age up to which delayed retirement credits may be earned from 70 to 72 on the same schedule. Increase the widow(er) NRA in the same manner. The earliest eligibility age (EEA) for worker and widow(er)'s benefit is unchanged.

We estimate that enactment of this provision alone would reduce the long-range OASDI actuarial deficit by 0.84 percent of taxable payroll and would reduce the annual deficit for the 75<sup>th</sup> projection year (2090) by 1.33 percent of payroll.

*5) Beginning with the December 2018 COLA, provide no COLA for those with modified adjusted gross income (MAGI) above specific thresholds and compute the COLA using the chain-weighted version of the CPI-U (C-CPI-U) for all other beneficiaries.*

For single/head-of-household/married-filing-separate taxpayers with MAGI below \$85,000 and for joint filers with MAGI below \$170,000 for the prior tax year, use the chain-weighted version of the Consumer Price Index for All Urban Consumers (C-CPI-U) to calculate the cost-of-living adjustment (COLA), beginning with the December 2018 COLA. For those beneficiaries whose MAGI is above \$85,000 (\$170,000 if filed jointly) for the prior tax year, provide no COLA. Index the eligibility income threshold amounts to the CPI-U after December 2018. These thresholds are the Medicare Income Related Monthly Adjustment Amount (IRMAA) and are indexed in the same way.

We estimate that enactment of this provision alone would reduce the long-range OASDI actuarial deficit by 1.25 percent of taxable payroll and would reduce the annual deficit for the 75<sup>th</sup> projection year (2090) by 2.31 percent of payroll.

*6) For spouses and children of retired workers and disabled workers becoming newly eligible beginning in 2023 and phased in for 2023 through 2032, limit their auxiliary benefit to the amount based on one-half of the PIA of a hypothetical worker with earnings equal to the national average wage index (AWI) each year up to his or her eligibility year, and who has the same eligibility year as the worker.*

For retired workers, the PIA is calculated as of age 62 and is increased by COLAs thereafter. For disabled workers, the PIA is calculated as of the year of benefit eligibility and is increased by COLAs thereafter.

We estimate that enactment of this provision alone would reduce the long-range OASDI actuarial deficit by 0.07 percent of taxable payroll and would reduce the annual deficit for the 75<sup>th</sup> projection year (2090) by 0.11 percent of payroll.

*7) Beginning in January 2019, require full time school enrollment as a condition of eligibility for child benefits at age 15 up to 18.*

Under current law, children of qualifying retired, disabled, or deceased workers can receive benefits on the worker's account regardless of school attendance up to age 18. Children attending elementary, middle, or high school can continue to receive benefits up to age 19. This provision would require full time school enrollment for children age 15 up to age 18 in order to be eligible for benefits. Eligibility for disabled adult child benefits after attaining age 18 would be unchanged.

We estimate that enactment of this provision alone would reduce the long-range OASDI actuarial deficit by 0.01 percent of taxable payroll and would reduce the annual deficit for the 75<sup>th</sup> projection year (2090) by 0.01 percent of payroll.

*8) Provide a new minimum benefit for workers with more than 10 years of covered earnings above a specified level, phased in for retired and disabled worker beneficiaries becoming newly eligible in 2023 through 2032.*

Under this provision, the PIA based on any worker's account would be set at the higher of (a) the amount based on the standard PIA computation or (b) a percentage of the AWI from the second year prior to initial eligibility. The percentage under (b) would be set at zero percent of AWI for those with 10 or fewer years of work (YOWs), rising to 15 percent of AWI for those with 15 YOWs, then increasing linearly to 19 percent of AWI for those with 19 YOWs. Then the minimum PIA would jump to 25 percent of AWI for those with 20 YOWs, increasing linearly to 35 percent of AWI for those with 35 or more YOWs. A YOW is equal to earnings at or above \$10,875 in 2017 (reflecting a full-time worker earning the federal minimum wage), adjusted thereafter for average wage growth. Scale the YOW requirements for disabled workers, based on years of non-disability. Use the AWI for two years prior to the year of initial eligibility in the minimum PIA calculation with COLA increases after the year of initial eligibility. This provision applies to all individuals receiving benefits on the account of a retired, disabled, or deceased worker.

We estimate that enactment of this provision alone would *increase* the long-range OASDI actuarial deficit by 0.23 percent of taxable payroll and would *increase* the annual deficit for the 75<sup>th</sup> projection year (2090) by 0.41 percent of payroll.

*9) Beginning in January 2019, eliminate the retirement earnings test for all beneficiaries under NRA.*

Under this provision, all beneficiaries under NRA would be exempt, including retired workers, aged spouses, aged widow(er)s, young spouses with a child in care, surviving spouses with a child in care, and children. Because beneficiaries at or above NRA are already exempt from the retirement earnings test under current law, this provision would completely eliminate the retirement earnings test for all beneficiaries.

We estimate that enactment of this provision alone would reduce the long-range OASDI actuarial deficit by 0.01 percent of taxable payroll and would reduce the annual deficit for the 75<sup>th</sup> projection year (2090) by 0.12 percent of payroll.

*10) Eliminate federal income taxation of OASDI benefits that is credited to the OASI and DI Trust Funds for 2054 and later, phased in from 2045 to 2053.*

Under current law, single tax filers with combined “income” (approximately equal to adjusted gross income plus non-taxable interest income and one-half of their Social Security benefit) greater than \$25,000 may have to pay income tax on up to 50 percent of the benefits. If combined “income” exceeds \$34,000, up to 85 percent of the benefits may be taxable. The income tax revenue for taxing up to 50 percent of Social Security benefits goes to the OASI and DI Trust Funds. The additional income tax revenue derived from taxing benefits in excess of 50 percent, up to 85 percent, goes to the Hospital Insurance (HI) Trust Fund. The process is similar for joint tax filers, with \$32,000 and \$44,000 thresholds applying for possible taxation of up to 50 percent or 85 percent of the Social Security benefits, respectively. All threshold levels are fixed amounts and not indexed to price inflation or average wage increase.

Under this provision, the \$25,000/\$32,000 thresholds would increase from 2045 to 2053, and taxation of OASDI benefits that is credited to the OASI and DI Trust Funds would be completely eliminated starting in 2054. The 2045 to 2053 thresholds for single and joint filers would be as follows:

- 2045: \$32,500/\$65,000
- 2046: \$40,000/\$80,000
- 2047: \$47,500/\$95,000
- 2048: \$55,000/\$110,000
- 2049: \$62,500/\$125,000
- 2050: \$70,000/\$140,000
- 2051: \$77,500/\$155,000
- 2052: \$85,000/\$170,000
- 2053: \$92,500/\$185,000.

We estimate that enactment of this provision alone would *increase* the long-range OASDI actuarial deficit by 0.40 percent of taxable payroll and would *increase* the annual deficit for the 75<sup>th</sup> projection year (2090) by 0.96 percent of payroll. Note that the HI Trust Fund would be held harmless relative to current law, with respect to taxation of benefit revenues.

*11) Provide an option to split the 8-percent delayed retirement credit (DRC) to offer a lump sum benefit at initial entitlement equivalent to 2 of the 8 percent DRC earned, and a 6 percent DRC on subsequent monthly benefits, effective for workers attaining age 62 in 2023 and later.*

Those attaining age 62 in 2023 or later have the option to split the current-law 8 percent DRC into two parts, a credit and a lump sum. The credit equals 6 percent for each year (0.5 percent for each month) that eligible benefits are not taken within three years after reaching NRA. The lump

sum is equal to the present value at the time of selecting the option of the additional future monthly benefits the worker is foregoing by taking the 6 percent rather than the full 8 percent DRC. Widows are held harmless from the lump sum decision, meaning that the full 8 percent will apply for widow benefits, even when the deceased worker had elected to take the lump sum option.

We estimate that the change in the long-range OASDI annual balance and the change in the annual deficit for the 75<sup>th</sup> projection year (2090) from enactment of this provision alone would be negligible: that is, between -0.005 and 0.005 percent of taxable payroll.

*12) Beginning in January 2023, provide an addition to monthly benefits for all beneficiaries who have been eligible for at least 20 years. The additional amount is calculated based on 5 percent of the PIA for a hypothetical worker with earnings equal to the national average wage index each year.*

Beginning in January 2023, augment the monthly benefit amount (not the PIA) for those of qualifying age and eligibility duration with an MAGI below \$25,000 if single and below \$50,000 if married. Use the Medicare IRMAA definition of MAGI (AGI plus tax-exempt interest income). For this provision, these thresholds are indexed for years after 2023 by the increase in the C-CPI-U. The full additional amount is applicable for those born in 1957 and later, once 24 years elapse from initial eligibility. The basic additional amount is calculated as 5 percent of the PIA of for a hypothetical worker with earnings equal to the AWI each year. For those born prior to 1957, the full additional amount is multiplied by the number of years they have been affected by the C-CPI-U, divided by 24.

Beneficiaries will receive 20 percent of their additional amount in their 20<sup>th</sup> year after initial benefit eligibility, 40 percent in their 21<sup>st</sup> year after initial eligibility, ..., and 100 percent of their additional amount in their 24<sup>th</sup> and later years after initial benefit eligibility.

Retired and disabled worker beneficiaries, dually entitled spouse beneficiaries, and all survivor beneficiaries receive their addition as described above. Spousal beneficiaries (aged or with a child in care) and child beneficiaries of a living retired or disabled worker receive 50 percent of the additional amount described above. Other beneficiary types (such as parents of deceased workers) will receive the percentage of the flat benefit that is equal to the percentage of the insured worker's PIA that they receive.

The AWI used is for the second year prior to the beneficiary's initial eligibility year, with applicable COLAs applied up to the age when the addition is received. The additional amount is added to the monthly benefit after reductions for early claiming or increases for delayed claiming have been applied.

We estimate that enactment of this provision alone would *increase* the long-range OASDI actuarial deficit by 0.07 percent of taxable payroll and would *increase* the annual deficit for the 75<sup>th</sup> projection year (2090) by 0.07 percent of payroll.



*13) Beginning in January 2023, for new and current disabled widow(er) beneficiaries, change the requirement that disability must occur no later than 7 years after the worker's death, or after surviving spouse with child-in-care benefits were last payable, to no later than 10 years.*

We estimate that the change in the long-range OASDI annual balance and the change in the annual deficit for the 75<sup>th</sup> projection year (2090) from enactment of this provision alone would be negligible: that is, between -0.005 and 0.005 percent of taxable payroll.

*14) Beginning in January 2023, for new and current disabled surviving spouse beneficiaries, eliminate the requirement to be age 50 or older for receipt of benefits.*

Under current law, widow(er)s must attain age 50 in order to qualify for benefits as widow(er)s on the basis of being disabled. This provision would remove the age-50 requirement.

We estimate that the change in the long-range OASDI annual balance and the change in the annual deficit for the 75<sup>th</sup> projection year (2090) from enactment of this provision alone would be negligible: that is, between -0.005 and 0.005 percent of taxable payroll.

*15) Beginning in January 2023, for new and current beneficiaries, waive the two-year duration of divorce requirement for divorced spouse benefit eligibility in cases where the worker (former spouse) remarries someone other than the claimant before the two-year period has elapsed.*

We estimate that the change in the long-range OASDI annual balance and the change in the annual deficit for the 75<sup>th</sup> projection year (2090) from enactment of this provision alone would be negligible: that is, between -0.005 and 0.005 percent of taxable payroll.

## **Detailed Financial Results for the Provisions of the Proposal**

### **Summary Results by Provision**

**Table A** provides estimates of the effects on the OASDI long-range actuarial balance for each of the fifteen provisions of the proposal separately and on a combined basis. The table also includes estimates of the effect of each provision on the annual balance (the difference between income rate and the cost rate, expressed as a percent of current-law taxable payroll) for the 75<sup>th</sup> projection year, 2090. Interaction among individual provisions is reflected only in the total estimates for the combined provisions.

### **Benefit Illustrations**

**Tables B1 and B2** provide illustrative examples of the projected change in benefit levels under the fifteen provisions that affect benefit levels for beneficiaries retiring at age 65 in future years at five selected earnings levels, with selected numbers of years of work. The “Maximum-AIME Steady Earner” is assumed to have earnings at ages 22 through 64 that equal the current-law taxable maximum level (equivalent to \$118,500 for 2016). **Table B3** provides additional important information on characteristics of retired workers represented by these illustrations.

Table B1 compares the initial scheduled benefit levels, assuming retirement at age 65 under the provisions of the proposal, to both scheduled and payable current-law benefit levels. Benefit amounts scheduled under the proposal are generally lower than those scheduled in current law, because the three provisions included in the table that decrease benefits for most workers (NRA increase, COLA decrease, mini-PIA) generally outweigh the other two provisions included (change the PIA formula, increase the minimum benefit). Note that two of the hypothetical worker examples provided have higher benefits than scheduled under current law because of the minimum benefit provision. The final two columns of this table show the level of scheduled benefits under the proposal as a percentage of current-law scheduled and current-law payable benefits, respectively.

Table B2 compares the change in scheduled benefit levels at ages 65, 75, 85, and 95 under the proposal to scheduled benefits under current law, assuming retirement at age 65. Table B2 shows that projected scheduled benefits under the provisions of the proposal decrease in relation to current-law scheduled benefits between ages 65 and 75 for most earners. The benefit addition increases proposal benefits for ages 85 and 95 above the level scheduled in current-law for several hypothetical lower-earner examples, and diminishes the decrease relative to current-law scheduled benefits for other earners.

The hypothetical workers represented in these tables reflect average career-earnings patterns of workers who started receiving retirement benefits under the Social Security program in recent years. The tables subdivide workers with very low and low career-average earnings levels by their numbers of years of non-zero earnings.

Table B3 provides information helpful in interpreting the benefit illustrations in tables B1 and B2. Percentages in Table B3 are based on tabulations from a 10-percent sample of newly-entitled retired workers in 2007. Table B3 displays the percentages of these newly-entitled retired workers in 2007 that are closest to each of the illustrative examples and are:

- 1) “Dually Entitled”, meaning they received a higher spouse or widow(er) benefit based on the career earnings of their husband or wife,
- 2) “WEP” (Windfall Elimination Provision), meaning that they received a reduced benefit due to having a pension based on earnings that were not covered under the OASDI program (primarily certain government workers), and they had less than 30 years of substantial earnings that were taxable under the OASDI program,
- 3) “Foreign Born”, meaning that they entered the Social Security coverage area after birth (and generally after entering working ages), and
- 4) “All Others”, meaning they had none of the three characteristics listed above.

The extent to which retired-worker beneficiaries represented by each of the illustrative examples have any of the characteristics listed above (dually entitled, WEP, foreign born) is important because such individuals are less dependent on the OASDI benefit that relates to their own career-average earnings level.



## Detailed Tables Containing Annual and Summary Projections

Enclosed with this letter are **tables 1, 1a, 1b, 1b.n, 1c, and 1d**, which provide annual and summary projections for the proposal.

### Trust Fund Operations

**Table 1** provides projections of the financial operations of the OASDI program under the proposal and shows that the combined OASDI Trust Funds would be fully solvent throughout the 75-year projection period. The OASDI program would also be solvent for the foreseeable future (sustainably solvent), because the OASDI trust fund ratio is projected to rise by the end of the period, 2091. As mentioned earlier, however, the relatively low trust fund ratios projected around 2045 provide only a small contingency reserve for solvency. Unforeseen economic conditions or other events affecting benefits and revenue might require additional measures around that time.

The table shows the annual cost and income rates, annual balances, and trust fund ratios (reserves as percent of annual program cost) for OASDI, as well as the change from current law in these cost rates, income rates, and annual balances. Included at the bottom of this table are summarized rates for the 75-year (long-range) period.

The annual balance (non-interest income minus program cost) under the proposal is slightly worse (more negative) than under current law from 2019 through 2021. For 2022 and later, the proposal improves the annual balance. The improvement in the annual balance increases to 3.7 percent of payroll for 2053, drops to 3.3 for 2054 (due to the full elimination of OASDI taxation of benefits starting in that year), and thereafter increases steadily to 4.5 percent of payroll for 2090. Under the proposal, the annual deficit generally worsens from 1.1 percent of payroll for 2016 to 2.1 percent of payroll for 2028, and then improves until the annual balance turns positive for 2045. The annual balance increases to 0.5 percent of payroll for 2053, drops to 0.2 percent of payroll for 2054, and then stays relatively stable through the end of the long-range period, ultimately reaching 0.2 percent of payroll for 2090. Under current law, the projected annual deficit for 2090 is 4.3 percent of payroll.

The actuarial balance for the OASDI program over the 75-year projection period is improved by 2.67 percent of taxable payroll, from an actuarial deficit of 2.66 percent of payroll under current law to a positive actuarial balance of 0.02 percent of taxable payroll under the proposal.

### Program Transfers and Trust Fund Reserves

Column 4 of **Table 1a** provides a projection of the level of reserves for the theoretical combined OASI and DI Trust Funds, assuming enactment of the fifteen Social Security provisions of the proposal. These trust fund reserve amounts are expressed in present value dollars discounted to January 1, 2016. The table indicates that the provisions include no new specified transfers of general revenue to the trust funds. For purpose of comparison, the OASDI Trust Fund reserves, expressed in present value dollars, are also shown for the current-law Social Security program both without and with the added proposal general fund transfers (zero in this case) in columns 6 and 7.

Note that negative values in columns 6 and 7 represent the “unfunded obligation” for the program through the year. The unfunded obligation is the present value of the shortfall of revenue needed to pay full scheduled benefits on a timely basis from the date of trust fund reserve depletion through the end of the indicated year. Gross Domestic Product (GDP), expressed in present value dollars, is shown in column 5 for comparison with other values in the table.

#### Effect of the Social Security Provisions on the Federal Budget

**Table 1b** shows the projected effect, in present value discounted dollars, on the federal budget (unified-budget and on-budget) annual cash flows and balances, assuming enactment of the fifteen Social Security provisions of the proposal. Table **1b.n** provides the estimated nominal dollar effect of enactment of the proposal on annual budget balances for years 2016 through 2026. All values in these tables represent the amount of *change* from the level projected under current law. In addition, changes reflect the budget scoring convention that presumes benefits, not payable under the law after depletion of trust fund reserves, would still be paid using revenue provided from the General Fund of the Treasury. The reader should be cautioned that this presumption of payment of benefits beyond the resources of the trust funds is prohibited under current law and is also inconsistent with all past experience under the Social Security program.

We understand that the elimination of taxation of Social Security benefits under provision 10 is intended to hold the Medicare HI Trust Fund harmless. The tables provided here for effects on the budget do not reflect any change based on revenue provided to HI from taxing OASDI benefits.

Column 1 of Table 1b shows the added proposal general fund transfers (zero for this proposal). Column 2 shows the net changes in OASDI cash flow from all provisions of the proposal.

We expect the net effect of the proposal on unified budget cash flow (column 3) to be negative in years 2019 through 2021, and then positive in years 2022 and later, with the decrease in program cost more than offsetting income decreases.

Column 4 of Table 1b indicates that the effect of implementing the proposal is a reduction of the federal debt held by the public, reaching about \$11.9 trillion in present value at the end of the 75-year projection period. Column 5 provides the projected effect of the proposal on the annual unified budget balances, including both the cash flow effect in column 3 and the additional interest on the accumulated debt in column 4. Columns 6 and 7 indicate that the provisions of this proposal would have no expected direct effects on the on-budget cash flow, or on the total federal debt, in the future.

It is important to note that we base these estimates on the intermediate assumptions of the 2016 Trustees Report, so these estimates are not consistent with estimates made by the Office of Management and Budget or the Congressional Budget Office based on their assumptions. In particular, all present values are discounted using trust fund yield assumptions under the intermediate assumptions of the 2016 Trustees Report.

### Annual Trust Fund Operations as a Percent of GDP

**Table 1c** provides annual cost, annual expenditures (amount that would be payable), and annual tax income for the OASDI program expressed as a percentage of GDP for both current law and assuming enactment of the fifteen Social Security provisions of the proposal. Showing the annual trust fund cash flows as a percent of GDP provides an additional perspective on these trust fund operations in relation to the total value of goods and services produced in the United States. The relationship between income and cost is similar when expressed as a percent of GDP to that when expressed as a percent of taxable payroll (Table 1).

### Effects on Trust Fund Reserves and Unfunded Obligations

**Table 1d** provides estimates of the changes in trust fund reserves and unfunded obligations on an annual basis. Values in this table are expressed in present value dollars discounted to January 1, 2016.

For the 75-year (long-range) period as a whole, the current-law unfunded obligation of \$11.4 trillion is replaced by a positive trust fund reserve of \$0.6 trillion in present value assuming enactment of the proposal. This change of \$11.9 trillion results from:

- A \$2.0 trillion net *decrease* in revenue (column 2), primarily from eliminating OASDI taxation of benefits in 2054 and later, *minus*
- A \$13.9 trillion net *decrease* in cost (column 3), primarily from increasing the NRA, reducing (and, for some, eliminating) the COLA, using a “mini-PIA” calculation, and modifying the PIA bend points and factors.

We hope these estimates are helpful. Please let me know if we may provide further assistance.

Sincerely,

A handwritten signature in black ink that reads "Stephen C. Goss". The signature is fluid and cursive, with the first name "Stephen" and last name "Goss" clearly legible.

Stephen C. Goss, ASA, MAAA  
Chief Actuary

Enclosures

**Table A—Estimated Long-Range OASDI Financial Effects of H.R. 6489,  
the “Social Security Reform Act of 2016,”  
Introduced by Chairman Sam Johnson**

<u>Provision</u>	<u>Estimated Change in Long-Range OASDI Actuarial Balance <sup>1</sup> (as a percent of payroll)</u>	<u>Estimated Change in Annual Balance for 75<sup>th</sup> year <sup>2</sup> (as a percent of payroll)</u>
<p>1) For retired worker and disabled worker beneficiaries becoming initially eligible in January 2023 or later, phase in a new benefit formula (from 2023 to 2032). Replace the existing two primary insurance amount (PIA) bend points with three new bend points as follows:</p> <ul style="list-style-type: none"> <li>• 25% AWI/12 from 2 years prior to initial eligibility</li> <li>• 100% AWI/12 from 2 years prior to initial eligibility</li> <li>• 125% AWI/12 from 2 years prior to initial eligibility</li> </ul> <p>The new PIA factors are 95%, 27.5%, 5% and 2%. During the phase in, those becoming newly eligible for benefits will receive an increasing portion of their benefits based on the new formula, reaching 100% of the new formula in 2032.....</p>	0.85	1.53
<p>2) Use an annualized “mini-PIA” formula beginning with retired and disabled worker beneficiaries becoming newly eligible in 2023, phased in over 10 years. For each year of earnings (indexed as under current law in a monthly equivalent form), compute a single year’s PIA For retired workers, sum these individual PIAs for the 35 highest years of indexed earnings and divide that total amount by 35 to get the PIA under this provision. For disabled workers, the number of highest mini-PIA years would equal the number of current-law benefit computation years. Phase-in over ten years, meaning that in 2023, 90 percent of the benefit would be based on the old PIA formula and 10 percent on the new mini-PIA formula, shifting by 10 percentage points each year until 100 percent is based on the new mini-PIA formula for those becoming newly eligible in 2032 and later .....</p>	0.34	0.59
<p>3) Replace the current-law WEP with a new calculation for most OASI and DI benefits based on covered and non-covered earnings, phased in for beneficiaries becoming newly eligible in 2023 to through 2032. For this new approach, compute a PIA based on all past earnings (covered and non-covered), and multiply by the “non-covered earnings ratio.” This ratio is equal to the current-law concept of the average indexed monthly earnings computed without non-covered earnings divided by a modified average indexed monthly earnings that includes both covered and non-covered earnings in our records .....</p>	0.03	0.05

**Table A—Estimated Long-Range OASDI Financial Effects of H.R. 6489,  
the “Social Security Reform Act of 2016,”  
Introduced by Chairman Sam Johnson**

<u>Provision</u>	<u>Estimated Change in Long-Range OASDI Actuarial Balance <sup>1</sup> (as a percent of payroll)</u>	<u>Estimated Change in Annual Balance for 75<sup>th</sup> year <sup>2</sup> (as a percent of payroll)</u>
4) After the normal retirement age (NRA) reaches 67 for those attaining age 62 in 2022, increase the NRA by 3 months per year starting for attaining age 62 in 2023 until it reaches 69 for those attaining age 62 in 2030. Increase the age up to which delayed retirement credits may be earned from 70 to 72 on the same schedule. Increase the widow(er) NRA in the same manner. The earliest eligibility age (EEA) for worker and widow(er)’s benefit is unchanged.....	0.84	1.33
5) For single/head-of-household/married-filing-separate taxpayers with modified adjusted gross income (MAGI) below \$85,000 and for joint filers with MAGI below \$170,000 for the prior tax year, use the chain-weighted version of the Consumer Price Index for All Urban Consumers (C-CPI-U) to calculate the cost-of-living adjustment (COLA), beginning with the December 2018 COLA. For those beneficiaries whose MAGI is above the \$85,000/\$170,000 for the prior tax year, provide no COLA. Index the eligibility income threshold amounts to the CPI-U after December 2018.....	1.25	2.31
6) For spouses and children of retired and disabled workers becoming newly eligible beginning in 2023 and phased in for 2023 through 2032, limit their auxiliary benefit to one-half of the PIA for a hypothetical worker with earnings equal to the national average wage index (AWI) each year .....	0.07	0.11
7) Beginning in January 2019, require full time school enrollment as a condition of eligibility for child benefits at age 15 up to 18.....	0.01	0.01
8) Provide a new minimum benefit for workers with more than 10 years of covered earnings above a specified level, phased in for retired and disabled workers becoming newly eligible in 2023 through 2032. Set the minimum PIA at zero percent of AWI for those with 10 or fewer years of work (YOW) to 15 percent of AWI of those with 15 YOWs, increasing linearly so that it reaches 19 percent for 19 YOWs. Then the minimum PIA would jump up to 25 percent of AWI for those with 20 YOWs, increasing linearly so that it equals 35 percent of AWI for those with 35 or more YOWs. A YOW is equal to earnings at or above \$10,875 in 2017 (reflecting a full-time worker earning the federal minimum wage), adjusted thereafter for average wage growth. Scale the YOW requirements for disabled workers, based on years of non-disability. Use the AWI for two years prior to the year of initial eligibility in the minimum PIA calculation with COLA increase after the year of initial eligibility.....	-0.23	-0.41

**Table A—Estimated Long-Range OASDI Financial Effects of H.R. 6489,  
the “Social Security Reform Act of 2016,”  
Introduced by Chairman Sam Johnson**

<u>Provision</u>	<u>Estimated Change in Long-Range OASDI Actuarial Balance <sup>1</sup> (as a percent of payroll)</u>	<u>Estimated Change in Annual Balance for 75<sup>th</sup> year <sup>2</sup> (as a percent of payroll)</u>
9) Beginning in January 2019, eliminate the retirement earnings test for all beneficiaries under normal retirement age, including retired workers, aged spouses, aged widow(er)s, young spouses with a child in care, young surviving spouses with a child in care, and children.....	0.01	0.12
10) Eliminate federal income taxation of OASDI benefits that is credited to the OASI and DI Trust Funds for 2054 and later. Phase out OASDI taxation of benefits by increasing relevant “income” thresholds from 2045 through 2053 as follows, for single/joint tax filers: <ul style="list-style-type: none"> <li>• 2045 = \$32,500/\$65,000</li> <li>• 2046 = 40,000/80,000</li> <li>• 2047 = 47,500/95,000</li> <li>• 2048 = 55,000/110,000</li> <li>• 2049 = 62,500/125,000</li> <li>• 2050 = 70,000/140,000</li> <li>• 2051 = 77,500/155,000</li> <li>• 2052 = 85,000/170,000</li> <li>• 2053 = 92,500/185,000</li> </ul> Taxation of benefits revenues for the Hospital Insurance (HI) Trust Fund would be maintained at the same level as if the current-law computation applied .....	-0.40	-0.96
11) Provide an option to split the 8-percent delayed retirement credit (DRC) to offer a lump sum benefit at initial entitlement equal to 2 percent of the 8 percent DRC earned, and a 6 percent DRC on subsequent monthly benefits, effective for workers attaining age 62 in 2023 and later. Widows are held harmless from the lump-sum decision.....	3	4

**Table A—Estimated Long-Range OASDI Financial Effects of H.R. 6489,  
the “Social Security Reform Act of 2016,”  
Introduced by Chairman Sam Johnson**

<u>Provision</u>	<u>Estimated Change in Long-Range OASDI Actuarial Balance <sup>1</sup> (as a percent of payroll)</u>	<u>Estimated Change in Annual Balance for 75<sup>th</sup> year <sup>2</sup> (as a percent of payroll)</u>
<p>12) Beginning in January 2023, provide an addition to monthly benefits for all beneficiaries who have been eligible for at least 20 years, with the following specifications:</p> <ul style="list-style-type: none"> <li>• Augment benefits (not the PIA) for those of qualifying age and eligibility duration with a MAGI below \$25,000 if single and \$50,000 if married. MAGI is set to equal the IRMAA definition (AGI plus tax-exempt interest income). Index these thresholds after 2023 by the increase in the C-CPI-U.</li> <li>• The full additional amount is applicable for those born 1957 and later, once 24 years elapse from initial eligibility. The basic additional amount is calculated as 5 percent of the PIA for a hypothetical worker with earnings equal to the AWI each year.</li> <li>• For those born prior to 1957, the full additional amount is multiplied by the number of years they have been affected by the C-CPI-U, divided by 24.</li> <li>• Beneficiaries will receive 20 percent of their additional amount in their 20<sup>th</sup> year after initial eligibility, 40 percent in their 21<sup>st</sup> year after initial eligibility,..., and 100 percent of their additional amount in their 24<sup>th</sup> and later years after benefit eligibility.</li> <li>• Retired and disabled worker beneficiaries, dually entitled spouse beneficiaries, and all survivor beneficiaries received their addition as described above. Spousal beneficiaries (aged or with child in care) and child beneficiaries of a living retired or disabled worker receive 50 percent of the additional amount described above. Other beneficiary types (such as parents of deceased workers) will receive the percentage of the flat benefit that equals the percentage of the insured worker’s PIA that they receive.</li> <li>• The AWI used is for the second year prior to the beneficiary’s initial eligibility year, with applicable COLAs applied up to the age when the addition is received.</li> <li>• The additional amount is added to the monthly benefit after reductions for early claiming or increases for delayed claiming have been applied.....</li> </ul>	-0.07	-0.07
<p>13) Beginning in January 2023, for new and current disabled widow(er) beneficiaries, change the requirement that disability must occur no later than 7 years after the worker’s death or after surviving spouse with child-in-care benefits were last payable, to no later than 10 years .....</p>	3	4

**Table A—Estimated Long-Range OASDI Financial Effects of H.R. 6489,  
the “Social Security Reform Act of 2016,”  
Introduced by Chairman Sam Johnson**

<u>Provision</u>	<u>Estimated Change in Long-Range OASDI Actuarial Balance <sup>1</sup> (as a percent of payroll)</u>	<u>Estimated Change in Annual Balance for 75<sup>th</sup> year <sup>2</sup> (as a percent of payroll)</u>
14) Beginning in January 2023, for new and current disabled surviving spouse beneficiaries, eliminate the requirement to be age 50 or older for receipt of benefits .....	3	4
15) Beginning in January 2023, for new and current beneficiaries, waive the two-year duration of divorce requirement for divorced spouse benefit eligibility, in cases where the worker (former spouse) remarries someone other than the claimant before the two-year period has elapsed .....	3	4
<b>Total for all provisions, including interaction.....</b>	<b>2.67</b>	<b>4.53</b>
<sup>1</sup> Under current law, the estimated long-range OASDI actuarial balance is -2.66 percent of taxable payroll. <sup>2</sup> Under current law, the estimated 75 <sup>th</sup> year annual balance is -4.35 percent of taxable payroll. <sup>3</sup> Estimated change in actuarial balance that is negligible; that is, between -0.005 and 0.005 percent of taxable payroll. <sup>4</sup> Estimated change in 75 <sup>th</sup> year annual balance that is negligible; that is, between -0.005 and 0.005 percent of taxable payroll.		
Notes: All estimates are based on the intermediate assumptions of the 2016 OASDI Trustees Report. Estimates of individual provisions appear on a stand-alone basis relative to current law, unless otherwise stated.		
Social Security Administration Office of the Chief Actuary December 8, 2016		



**Table B1. Changes in Benefits for Hypothetical Workers Beginning Benefit Receipt at age 65**  
**H.R. 6489, the "Social Security Reform Act of 2016," Introduced by Chairman Sam Johnson**

Year Attain Age 65	<u>Present Law Scheduled</u>		<u>Scheduled Benefit Level Percent Change at age 65</u>							<u>Proposal Scheduled Benefit</u>			
	<u>Monthly Benefits<sup>3</sup></u>		Increase	Reduced	<u>Bend Points</u>		<u>Incremental</u>	<u>Minimum</u>	<u>Total</u>	<u>Percent of Present Law:</u>			
	<u>(Wage-Indexed</u>	<u>(CPI-Indexed</u>			<u>PIA Formula</u>	<u>Factors<sup>6</sup></u>				<u>Mini PIA<sup>7</sup></u>	<u>Benefit<sup>8</sup></u>	<u>Scheduled</u>	<u>Payable</u>
	<u>2015 Dollars)</u>	<u>2015 Dollars)</u>											
<b>Very-Low-AIME (\$12,280 for 2016<sup>1</sup>) 30-Year Scaled Earner (8.9% of Retirees<sup>2</sup>)</b>													
2016	718	718	0.0	0.0	0.0	0.0	0.0	0.0	0.0	100	100		
2030	660	812	-9.1	-0.9	7.0	-7.0	21.5	8.9		109	109		
2050	661	1,036	-13.5	-0.9	14.1	-13.2	43.7	22.1		122	153		
2080	665	1,469	-13.5	-0.9	14.1	-13.2	43.7	22.1		122	162		
<b>Very-Low-AIME (\$12,280 for 2016<sup>1</sup>) 20-Year Scaled Earner (5.2% of Retirees<sup>2</sup>)</b>													
2016	718	718	0.0	0.0	0.0	0.0	0.0	0.0		100	100		
2030	660	812	-9.1	-0.9	7.0	-16.5	1.0	-18.7		81	81		
2050	661	1,036	-13.5	-0.9	14.1	-31.0	15.8	-21.8		78	98		
2080	665	1,469	-13.5	-0.9	14.1	-31.0	15.8	-21.8		78	104		
<b>Very-Low-AIME (\$12,280 for 2016<sup>1</sup>) 14-Year Scaled Earner (4.2% of Retirees<sup>2</sup>)</b>													
2016	718	718	0.0	0.0	0.0	0.0	0.0	0.0		100	100		
2030	660	812	-9.1	-0.9	7.0	-22.8	0.0	-25.6		74	74		
2050	661	1,036	-13.5	-0.9	14.1	-42.9	0.0	-44.1		56	70		
2080	665	1,469	-13.5	-0.9	14.1	-42.9	0.0	-44.1		56	74		
<b>Low-AIME (\$22,105 for 2016<sup>1</sup>) 44-Year Scaled Earner (16.9% of Retirees<sup>2</sup>)</b>													
2016	940	940	0.0	0.0	0.0	0.0	0.0	0.0		100	100		
2030	863	1,062	-9.1	-0.9	3.7	0.0	11.9	4.5		105	105		
2050	865	1,356	-13.5	-0.9	7.4	0.0	19.5	10.1		110	138		
2080	869	1,921	-13.5	-0.9	7.5	0.0	19.5	10.1		110	147		
<b>Low-AIME (\$22,105 for 2016<sup>1</sup>) 30-Year Scaled Earner (4.4% of Retirees<sup>2</sup>)</b>													
2016	940	940	0.0	0.0	0.0	0.0	0.0	0.0		100	100		
2030	863	1,062	-9.1	-0.9	3.7	-4.4	8.6	-3.0		97	97		
2050	865	1,356	-13.5	-0.9	7.4	-8.5	18.1	-0.4		100	125		
2080	869	1,921	-13.5	-0.9	7.5	-8.5	18.1	-0.4		100	133		
<b>Low-AIME (\$22,105 for 2016<sup>1</sup>) 20-Year Scaled Earner (2.0% of Retirees<sup>2</sup>)</b>													
2016	940	940	0.0	0.0	0.0	0.0	0.0	0.0		100	100		
2030	863	1,062	-9.1	-0.9	3.7	-12.8	0.7	-18.0		82	82		
2050	865	1,356	-13.5	-0.9	7.4	-24.7	13.3	-21.4		79	99		
2080	869	1,921	-13.5	-0.9	7.5	-24.7	13.3	-21.3		79	105		
<b>Medium-AIME (\$49,121 for 2016<sup>1</sup>) 44-Year Scaled Earner (29.2% of Retirees<sup>2</sup>)</b>													
2016	1,548	1,548	0.0	0.0	0.0	0.0	0.0	0.0		100	100		
2030	1,423	1,750	-9.1	-0.9	-0.6	-1.0	0.0	-11.4		89	89		
2050	1,425	2,234	-13.5	-0.9	-1.2	-2.0	0.0	-16.9		83	104		
2080	1,433	3,166	-13.5	-0.9	-1.2	-2.0	0.0	-16.9		83	111		
<b>Medium-AIME (\$49,121 for 2016<sup>1</sup>) 30-Year Scaled Earner (3.2% of Retirees<sup>2</sup>)</b>													
2016	1,548	1,548	0.0	0.0	0.0	0.0	0.0	0.0		100	100		
2030	1,423	1,750	-9.1	-0.9	-0.6	-7.5	0.0	-17.2		83	83		
2050	1,425	2,234	-13.5	-0.9	-1.2	-15.1	0.0	-28.1		72	90		
2080	1,433	3,166	-13.5	-0.9	-1.2	-15.1	0.0	-28.0		72	96		
<b>High-AIME (\$78,594 for 2016<sup>1</sup>) 44-Year Scaled Earner (19.8% of Retirees<sup>2</sup>)</b>													
2016	2,053	2,053	0.0	0.0	0.0	0.0	0.0	0.0		100	100		
2030	1,885	2,319	-9.1	-0.9	-11.1	0.0	0.0	-19.9		80	80		
2050	1,888	2,960	-13.5	-0.9	-22.2	0.0	0.0	-33.2		67	84		
2080	1,899	4,195	-13.5	-0.9	-22.2	0.0	0.0	-33.2		67	89		
<b>Maximum-AIME (\$118,500 for 2016<sup>1</sup>) 43-Year Steady Earner (6.3% of Retirees<sup>2</sup>)</b>													
2016	2,492	2,492	0.0	0.0	0.0	0.0	0.0	0.0		100	100		
2030	2,308	2,839	-9.1	-0.9	-17.0	0.0	0.0	-25.2		75	75		
2050	2,309	3,622	-13.5	-0.9	-34.0	0.0	0.0	-43.3		57	71		
2080	2,317	5,119	-13.5	-0.9	-33.8	0.0	0.0	-43.2		57	76		

<sup>1</sup> Average of highest 35 years of earnings wage indexed to 2016.

<sup>2</sup> Projected percent of new retired worker awards in 2050 closest to AIME levels and years of work.

<sup>3</sup> After the trust fund reserves deplete under present law continuing taxes are expected to be enough to pay about three fourths of scheduled benefits.

<sup>4</sup> After NRA reaches 67 in 2022, increase 3 months per year until NRA reaches 69 for those attaining 62 in 2030.

<sup>5</sup> Starting Dec 2018, prior to benefit receipt, compute the COLA using the chain-weighted C-CPI-U, producing 0.3% lower annual COLAs on average.

<sup>6</sup> Starting in 2023, set BP1 equal to 25% of AWI/12, BP2 equal to AWI/12, BP3 equal to 125% AWI/12 (2 year lag), and change the PIA factors to 95%/27.5%/5%/2%. Phase in the new BP and PIA factors years of initial eligibility 2023-2032.

<sup>7</sup> Incremental change due to the mini-PIA approach. Phase in the new benefit formula for those newly eligible in years 2023-2032.

<sup>8</sup> Provide a minimum PIA such that a worker with 35/20/19/15/10 years of work would have a PIA of at least 35%/25%/19%/15%/0% of AWI/12. A year of work is equal to \$10,875 in 2017, indexed for average wage growth. This provision would take full effect for all worker beneficiaries in 2032 and later, phasing in between 2023 and 2032. The Minimum Benefit Percent change is calculated by applying this provision after all other provisions.

Note: These tables do not reflect the reduced taxation of OASDI benefits that would go to the Hospital Insurance (HI) Trust Fund assuming enactment of this Bill.  
All estimates based on the intermediate assumptions of the 2016 Trustees Report.

**Table B2. Changes in Benefits for Hypothetical Workers Beginning Benefit Receipt at age 65  
H.R. 6489, the "Social Security Reform Act of 2016," Introduced by Chairman Sam Johnson**

**Proposal Scheduled Benefit as Percent of Present Law Scheduled**

Year Attain Age 65	Age 65	Age 75	Age 85 <sup>3</sup>	Age 95 <sup>3</sup>
		(Percent)		
	<b>Very-Low-AIME (\$12,280 for 2016<sup>1</sup>) 30-Year Scaled Earner (8.9% of Retirees<sup>2</sup>)</b>			
2016	100.0	97.7	101.8	100.5
2030	108.9	105.8	112.0	111.0
2050	122.1	118.6	124.3	123.0
2080	122.1	118.6	124.4	123.0
	<b>Very-Low-AIME (\$12,280 for 2016<sup>1</sup>) 20-Year Scaled Earner (5.2% of Retirees<sup>2</sup>)</b>			
2016	100.0	97.7	101.8	100.5
2030	81.3	79.0	85.9	85.7
2050	78.2	75.9	82.9	82.8
2080	78.2	76.0	82.9	82.8
	<b>Very-Low-AIME (\$12,280 for 2016<sup>1</sup>) 14-Year Scaled Earner (4.2% of Retirees<sup>2</sup>)</b>			
2016	100.0	97.7	101.8	100.5
2030	74.4	72.2	79.4	79.4
2050	55.9	54.3	61.9	62.4
2080	55.9	54.3	61.9	62.4

	<b>Low-AIME (\$22,105 for 2016<sup>1</sup>) 44-Year Scaled Earner (16.9% of Retirees<sup>2</sup>)</b>			
2016	100.0	97.7	100.2	98.6
2030	104.5	101.5	105.7	104.3
2050	110.1	106.9	110.9	109.4
2080	110.1	106.9	103.9	100.9
	<b>Low-AIME (\$22,105 for 2016<sup>1</sup>) 30-Year Scaled Earner (4.4% of Retirees<sup>2</sup>)</b>			
2016	100.0	97.7	100.2	98.6
2030	97.0	94.2	98.5	97.4
2050	99.6	96.7	101.0	99.8
2080	99.6	96.8	94.0	91.3
	<b>Low-AIME (\$22,105 for 2016<sup>1</sup>) 20-Year Scaled Earner (2.0% of Retirees<sup>2</sup>)</b>			
2016	100.0	97.7	100.2	98.6
2030	82.0	79.7	84.4	83.7
2050	78.6	76.4	81.2	80.6
2080	78.7	76.4	74.2	72.0

	<b>Medium-AIME (\$49,121 for 2016<sup>1</sup>) 44-Year Scaled Earner (29.2% of Retirees<sup>2</sup>)</b>			
2016	100.0	97.7	94.9	92.1
2030	88.6	86.1	83.6	81.2
2050	83.1	80.7	78.3	76.1
2080	83.1	80.7	78.3	76.1
	<b>Medium-AIME (\$49,121 for 2016<sup>1</sup>) 30-Year Scaled Earner (3.2% of Retirees<sup>2</sup>)</b>			
2016	100.0	97.7	94.9	92.1
2030	82.8	80.4	78.1	75.8
2050	71.9	69.9	67.9	65.9
2080	72.0	69.9	67.9	65.9

	<b>High-AIME (\$78,594 for 2016<sup>1</sup>) 44-Year Scaled Earner (19.8% of Retirees<sup>2</sup>)</b>			
2016	100.0	97.7	94.9	92.1
2030	80.1	77.8	75.5	73.4
2050	66.8	51.6	40.0	30.9
2080	66.8	51.7	40.0	30.9

	<b>Maximum-AIME (\$118,500 for 2016<sup>1</sup>) 43-Year Steady Earner (6.3% of Retirees<sup>2</sup>)</b>			
2016	100.0	81.4	63.0	48.7
2030	74.8	57.8	44.7	34.6
2050	56.7	43.8	33.9	26.2
2080	56.8	43.9	34.0	26.3

<sup>1</sup> Average of highest 35 years of earnings wage indexed to 2016.

<sup>2</sup> Projected percent of new retired worker awards in 2050 closest to AIME levels and years of work.

<sup>3</sup> Increase the benefit by 5% of an AWI worker for those with a MAGI below \$25,000 if single and \$50,000 if married beginning at age 81 and phased in over five years starting in 2023. Index the MAGI thresholds using C-CPI-U.

Note: Starting in 2018, if MAGI is less than \$85,000 if single and \$170,000 if married, compute the COLA using the chain-weighted C-CPI-U, producing 0.3 percentage point lower annual COLAs on average. If MAGI is above the \$85,000 single/\$170,000 married threshold, eliminate the COLA. Index the eligibility income threshold amounts using CPI-W.

Other Changes:

- After NRA reaches 67 in 2022, increase 3 months per year until NRA reaches 69 for those attaining 62 in 2030.
- Starting in 2023, set BP1 equal to 25% of AWI/12, BP2 equal to AWI/12, BP3 equal to 125% AWI/12 (2 year lag), and change the PIA factors to 95%/27.5%/5%/2%. Calculate the PIA using the mini-PIA approach. Phase in the new BP, PIA factors, and benefit formula for those newly eligible in years 2023-2032.
- Provide a minimum PIA such that a worker with 35/20/19/15/10 years of work would have a PIA of at least 35%/25%/19%/15%/0% of AWI/12. A year of work is equal to \$10,875 in 2017, indexed for average wage growth. This provision would take full effect for all worker beneficiaries in 2032 and later, phasing in between 2023 and 2032.

Note: These tables do not reflect the reduced taxation of OASDI benefits that would go to the Hospital Insurance (HI) Trust Fund assuming enactment of this Bill.

All estimates based on the intermediate assumptions of the 2016 Trustees Report.

**Table B3. Important Characteristics of Hypothetical Workers in 2007**

<u>Category</u>	<u>Percent of Beneficiaries Within Each Category That Are:</u>			
	<u>Dually Entitled<sup>2</sup></u>	<u>WEP<sup>3</sup></u>	<u>Foreign Born</u>	<u>All Others<sup>4</sup></u>
<b>Very-Low-AIME (\$12,280 for 2016<sup>1</sup>):</b>				
30-Year Scaled Earner (9.3% of Retirees)	47	6	11	40
20-Year Scaled Earner (5.8% of Retirees)	38	16	21	31
14-Year Scaled Earner (5.3% of Retirees)	22	21	45	20
<b>Low-AIME (\$22,105 for 2016<sup>1</sup>):</b>				
44-Year Scaled Earner (13.1% of Retirees)	15	2	6	78
30-Year Scaled Earner (5.9% of Retirees)	16	9	18	59
20-Year Scaled Earner (3.1% of Retirees)	10	23	35	37
<b>Medium-AIME (\$49,121 for 2016<sup>1</sup>):</b>				
44-Year Scaled Earner (23.0% of Retirees)	1	1	5	93
30-Year Scaled Earner (4.4% of Retirees)	1	8	26	67
<b>High-AIME (\$78,594 for 2016<sup>1</sup>):</b>				
44-Year Scaled Earner (20.5% of Retirees)	0	0	6	93
<b>Maximum-AIME (\$118,500 for 2016<sup>1</sup>):</b>				
Steady Earner (9.4% of Retirees)	0	0	7	93

Note 1: Table B3 displays the percentages of these newly-entitled retired workers in 2007 that are closest to each of the illustrative examples.

Note 2: Percents based on tabulations of a 10-percent sample of newly entitled retired-worker beneficiaries in 2007 (169,725 records). We can be 95 percent confident that each of the values shown above is within 1.4 percentage points of the value we would find using 100 percent of the retirees in 2007.

Note 3: The sum of the percentages for each category (sum across rows) could be greater than 100 percent because some beneficiaries can be classified in more than one of the following groups: dually entitled, WEP, and foreign born.

<sup>1</sup> Average of highest 35 years of earnings wage indexed to 2016.

<sup>2</sup> Under current law, entitled to an additional benefit based on someone else's account. The dually entitled percent is a minimum value. Some beneficiaries that are not currently dually entitled could become dually entitled in the future.

<sup>3</sup> Covered by pension from government employment and are subject to the windfall elimination provision (WEP).

<sup>4</sup> Neither foreign born, subject to WEP, or dually entitled.

**Table 1 - OASDI Cost Rate, Income Rate, Annual Balance, and Trust Fund Ratio**  
**H.R. 6489, the "Social Security Reform Act of 2016," Introduced by Chairman Sam Johnson**

Proposal					Change from Present Law				
Expressed as a percentage of present-law taxable payroll					Expressed as a percentage of present-law taxable payroll				
Year	Cost Rate	Income Rate	Annual Balance	Trust Fund Ratio 1-1-year	Cost Rate	Income Rate	Annual Balance		
2016	14.05	12.94	-1.10	303	0.00	0.00	0.00		
2017	13.72	12.92	-0.80	293	0.00	0.00	0.00		
2018	13.86	12.96	-0.90	277	0.00	0.00	0.00		
2019	14.23	12.98	-1.25	257	0.24	0.01	-0.23		
2020	14.27	12.99	-1.28	242	0.14	0.01	-0.13		
2021	14.32	13.01	-1.31	228	0.05	0.00	-0.04		
2022	14.46	13.04	-1.43	214	-0.03	0.00	0.03		
2023	14.65	13.06	-1.60	199	-0.10	0.00	0.10		
2024	14.83	13.09	-1.74	183	-0.19	-0.01	0.19		
2025	15.00	13.10	-1.90	168	-0.29	-0.01	0.27		
2026	15.09	13.11	-1.98	154	-0.38	-0.02	0.36		
2027	15.16	13.12	-2.04	140	-0.49	-0.02	0.47		
2028	15.20	13.13	-2.07	126	-0.61	-0.03	0.59		
2029	15.18	13.13	-2.04	114	-0.79	-0.03	0.76		
2030	15.12	13.14	-1.98	102	-0.98	-0.04	0.94		
2031	15.02	13.14	-1.88	91	-1.20	-0.05	1.15		
2032	14.89	13.14	-1.76	80	-1.43	-0.06	1.37		
2033	14.76	13.13	-1.62	70	-1.65	-0.07	1.58		
2034	14.61	13.13	-1.48	61	-1.85	-0.08	1.77		
2035	14.44	13.12	-1.32	52	-2.05	-0.09	1.96		
2036	14.31	13.12	-1.20	44	-2.24	-0.10	2.14		
2037	14.18	13.11	-1.06	37	-2.42	-0.11	2.31		
2038	14.02	13.11	-0.91	30	-2.59	-0.12	2.47		
2039	13.86	13.10	-0.76	25	-2.75	-0.13	2.62		
2040	13.70	13.09	-0.61	20	-2.89	-0.14	2.75		
2041	13.55	13.08	-0.46	16	-3.02	-0.15	2.87		
2042	13.40	13.08	-0.32	13	-3.14	-0.15	2.98		
2043	13.25	13.07	-0.18	11	-3.25	-0.16	3.09		
2044	13.11	13.06	-0.05	10	-3.36	-0.17	3.19		
2045	12.99	13.02	0.03	10	-3.46	-0.21	3.25		
2046	12.87	12.98	0.12	10	-3.56	-0.25	3.31		
2047	12.75	12.95	0.20	12	-3.65	-0.28	3.37		
2048	12.65	12.92	0.27	13	-3.74	-0.31	3.42		
2049	12.55	12.89	0.34	16	-3.82	-0.34	3.48		
2050	12.46	12.86	0.41	19	-3.90	-0.37	3.53		
2051	12.38	12.84	0.46	23	-3.98	-0.39	3.59		
2052	12.32	12.82	0.50	27	-4.05	-0.41	3.64		
2053	12.27	12.80	0.53	31	-4.12	-0.43	3.69		
2054	12.24	12.40	0.16	36	-4.18	-0.84	3.35		
2055	12.22	12.40	0.18	38	-4.25	-0.84	3.41		
2056	12.20	12.40	0.20	40	-4.31	-0.85	3.46		
2057	12.19	12.40	0.21	42	-4.37	-0.85	3.52		
2058	12.18	12.40	0.22	44	-4.42	-0.85	3.57		
2059	12.18	12.40	0.22	47	-4.48	-0.86	3.62		
2060	12.18	12.40	0.22	49	-4.52	-0.86	3.66		
2061	12.19	12.40	0.21	51	-4.56	-0.86	3.70		
2062	12.20	12.40	0.20	54	-4.60	-0.87	3.74		
2063	12.21	12.40	0.19	56	-4.64	-0.87	3.77		
2064	12.22	12.40	0.18	58	-4.68	-0.88	3.81		
2065	12.24	12.40	0.16	60	-4.72	-0.88	3.84		
2066	12.25	12.40	0.15	62	-4.75	-0.88	3.87		
2067	12.27	12.40	0.13	64	-4.79	-0.89	3.90		
2068	12.29	12.40	0.12	66	-4.83	-0.89	3.94		
2069	12.30	12.40	0.10	67	-4.86	-0.89	3.97		
2070	12.32	12.40	0.08	69	-4.90	-0.90	4.00		
2071	12.33	12.40	0.07	70	-4.93	-0.90	4.04		
2072	12.34	12.40	0.06	72	-4.97	-0.90	4.07		
2073	12.34	12.40	0.06	73	-5.00	-0.90	4.10		
2074	12.34	12.40	0.06	74	-5.03	-0.91	4.13		
2075	12.33	12.40	0.07	76	-5.06	-0.91	4.15		
2076	12.32	12.40	0.08	77	-5.09	-0.91	4.18		
2077	12.30	12.40	0.10	79	-5.11	-0.91	4.20		
2078	12.28	12.40	0.12	81	-5.13	-0.91	4.22		
2079	12.26	12.40	0.14	83	-5.15	-0.91	4.23		
2080	12.24	12.40	0.16	85	-5.16	-0.91	4.25		
2081	12.22	12.40	0.18	88	-5.18	-0.91	4.27		
2082	12.21	12.40	0.19	90	-5.20	-0.91	4.28		
2083	12.20	12.40	0.20	93	-5.22	-0.91	4.31		
2084	12.20	12.40	0.20	96	-5.24	-0.91	4.33		
2085	12.19	12.40	0.21	98	-5.27	-0.92	4.36		
2086	12.19	12.40	0.21	101	-5.31	-0.92	4.39		
2087	12.20	12.40	0.20	104	-5.35	-0.92	4.43		
2088	12.20	12.40	0.20	107	-5.38	-0.92	4.46		
2089	12.21	12.40	0.19	110	-5.42	-0.92	4.50		
2090	12.22	12.40	0.18	113	-5.46	-0.93	4.53		
2091	12.23	12.40	0.17	115	-5.49	-0.93	4.56		

**Transition Team  
Member Document--  
Non-Public Information.  
This document may be  
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authorized Transition  
Team Members only.**

Summarized Rates: OASDI				
	Cost Rate	Income Rate	Actuarial Balance	Year of reserve depletion <sup>1</sup>
2016 - 2090	13.39%	13.41%	0.02%	N/A

Summarized Rates: OASDI		
Change in Cost rate	Change in Income Rate	Change in Actuarial Balance
-3.11%	-0.44%	2.67%

Based on Intermediate Assumptions of the 2016 Trustees Report.  
<sup>1</sup>Under present law the year of combined Trust Fund reserve depletion is 2034.

**Table 1a - General Fund Transfers, OASDI Trust Fund Reserves, and Theoretical OASDI Reserves**  
**H.R. 6489, the "Social Security Reform Act of 2016," Introduced by Chairman Sam Johnson**

Proposal General Fund Transfers				Present Value in Billions as of 1-1-2016			
Calendar Year	Percentage of Payroll	Present Value in Billions as of 1-1- 2016		Proposal Total OASDI Trust Fund Reserves at End of Year	Gross Domestic Product	Theoretical Social Security <sup>1</sup> with Borrowing Authority	
		Annual Amounts	Accumulated as of End of Year	Net OASDI Trust Fund Reserves at End of Year			
				Without General Fund Transfers		With Plan General Fund Transfers	
	(1)	(2)	(3)	(4)	(5)	(6)	(7)
2016	0.0	0.0	0.0	2,741.0	18,368.5	2,741.0	2,741.0
2017	0.0	0.0	0.0	2,687.5	18,780.3	2,687.5	2,687.5
2018	0.0	0.0	0.0	2,625.9	19,199.4	2,625.9	2,625.9
2019	0.0	0.0	0.0	2,538.4	19,590.0	2,554.4	2,554.4
2020	0.0	0.0	0.0	2,446.3	19,948.3	2,471.7	2,471.7
2021	0.0	0.0	0.0	2,350.2	20,275.2	2,378.9	2,378.9
2022	0.0	0.0	0.0	2,244.0	20,546.2	2,270.6	2,270.6
2023	0.0	0.0	0.0	2,123.5	20,765.2	2,142.4	2,142.4
2024	0.0	0.0	0.0	1,990.4	20,965.2	1,994.9	1,994.9
2025	0.0	0.0	0.0	1,844.0	21,141.0	1,827.2	1,827.2
2026	0.0	0.0	0.0	1,690.7	21,283.5	1,645.4	1,645.4
2027	0.0	0.0	0.0	1,532.5	21,355.9	1,450.6	1,450.6
2028	0.0	0.0	0.0	1,372.1	21,346.6	1,244.3	1,244.3
2029	0.0	0.0	0.0	1,214.9	21,259.6	1,028.4	1,028.4
2030	0.0	0.0	0.0	1,063.8	21,099.1	804.8	804.8
2031	0.0	0.0	0.0	922.0	20,898.2	575.3	575.3
2032	0.0	0.0	0.0	790.9	20,696.5	341.0	341.0
2033	0.0	0.0	0.0	671.1	20,500.4	103.7	103.7
2034	0.0	0.0	0.0	563.2	20,306.0	-134.7	-134.7
2035	0.0	0.0	0.0	467.9	20,116.5	-372.8	-372.8
2036	0.0	0.0	0.0	382.7	19,925.6	-612.3	-612.3
2037	0.0	0.0	0.0	308.0	19,743.3	-852.1	-852.1
2038	0.0	0.0	0.0	244.5	19,571.8	-1,090.4	-1,090.4
2039	0.0	0.0	0.0	192.1	19,401.7	-1,326.1	-1,326.1
2040	0.0	0.0	0.0	150.8	19,234.9	-1,558.1	-1,558.1
2041	0.0	0.0	0.0	120.2	19,071.7	-1,786.1	-1,786.1
2042	0.0	0.0	0.0	99.4	18,908.8	-2,010.0	-2,010.0
2043	0.0	0.0	0.0	88.3	18,751.3	-2,229.8	-2,229.8
2044	0.0	0.0	0.0	86.1	18,594.5	-2,445.4	-2,445.4
2045	0.0	0.0	0.0	89.1	18,429.9	-2,657.8	-2,657.8
2046	0.0	0.0	0.0	97.7	18,269.6	-2,866.7	-2,866.7
2047	0.0	0.0	0.0	111.5	18,107.9	-3,072.2	-3,072.2
2048	0.0	0.0	0.0	129.9	17,944.3	-3,274.5	-3,274.5
2049	0.0	0.0	0.0	152.6	17,781.3	-3,473.9	-3,473.9
2050	0.0	0.0	0.0	179.2	17,618.6	-3,670.6	-3,670.6
2051	0.0	0.0	0.0	208.9	17,454.0	-3,865.4	-3,865.4
2052	0.0	0.0	0.0	240.9	17,289.8	-4,059.0	-4,059.0
2053	0.0	0.0	0.0	274.2	17,125.7	-4,251.9	-4,251.9
2054	0.0	0.0	0.0	284.7	16,960.9	-4,444.5	-4,444.5
2055	0.0	0.0	0.0	296.5	16,796.5	-4,637.2	-4,637.2
2056	0.0	0.0	0.0	309.2	16,631.9	-4,830.5	-4,830.5
2057	0.0	0.0	0.0	322.3	16,467.6	-5,024.3	-5,024.3
2058	0.0	0.0	0.0	335.7	16,304.7	-5,218.8	-5,218.8
2059	0.0	0.0	0.0	349.1	16,142.6	-5,413.9	-5,413.9
2060	0.0	0.0	0.0	362.1	15,981.3	-5,609.6	-5,609.6
2061	0.0	0.0	0.0	374.5	15,821.7	-5,805.8	-5,805.8
2062	0.0	0.0	0.0	386.2	15,664.2	-6,002.5	-6,002.5
2063	0.0	0.0	0.0	397.2	15,508.7	-6,199.6	-6,199.6
2064	0.0	0.0	0.0	407.5	15,355.7	-6,397.1	-6,397.1
2065	0.0	0.0	0.0	417.0	15,204.5	-6,595.0	-6,595.0
2066	0.0	0.0	0.0	425.5	15,055.3	-6,793.3	-6,793.3
2067	0.0	0.0	0.0	433.0	14,907.9	-6,992.1	-6,992.1
2068	0.0	0.0	0.0	439.6	14,762.2	-7,191.4	-7,191.4
2069	0.0	0.0	0.0	445.3	14,618.0	-7,391.0	-7,391.0
2070	0.0	0.0	0.0	450.1	14,476.2	-7,591.0	-7,591.0
2071	0.0	0.0	0.0	454.2	14,336.4	-7,791.2	-7,791.2
2072	0.0	0.0	0.0	458.1	14,198.6	-7,991.1	-7,991.1
2073	0.0	0.0	0.0	461.7	14,062.2	-8,190.5	-8,190.5
2074	0.0	0.0	0.0	465.4	13,927.2	-8,389.1	-8,389.1
2075	0.0	0.0	0.0	469.4	13,793.7	-8,586.7	-8,586.7
2076	0.0	0.0	0.0	473.8	13,661.5	-8,782.6	-8,782.6
2077	0.0	0.0	0.0	479.0	13,530.3	-8,976.7	-8,976.7
2078	0.0	0.0	0.0	485.1	13,399.9	-9,168.8	-9,168.8
2079	0.0	0.0	0.0	492.1	13,271.0	-9,358.6	-9,358.6
2080	0.0	0.0	0.0	500.1	13,143.2	-9,546.2	-9,546.2
2081	0.0	0.0	0.0	508.7	13,016.0	-9,731.8	-9,731.8
2082	0.0	0.0	0.0	517.8	12,889.1	-9,915.6	-9,915.6
2083	0.0	0.0	0.0	527.2	12,762.3	-10,098.0	-10,098.0
2084	0.0	0.0	0.0	536.7	12,635.6	-10,279.3	-10,279.3
2085	0.0	0.0	0.0	546.1	12,509.3	-10,459.9	-10,459.9
2086	0.0	0.0	0.0	555.6	12,383.5	-10,639.8	-10,639.8
2087	0.0	0.0	0.0	564.8	12,258.4	-10,819.4	-10,819.4
2088	0.0	0.0	0.0	573.7	12,134.0	-10,998.8	-10,998.8
2089	0.0	0.0	0.0	582.1	12,010.4	-11,177.9	-11,177.9
2090	0.0	0.0	0.0	590.0	11,887.6	-11,356.8	-11,356.8
2091	0.0	0.0	0.0	597.4	11,765.8	-11,535.6	-11,535.6
Total 2016-2090		0.0					

Based on the Intermediate Assumptions of the 2016 Trustees Report.  
Ultimate Real Trust Fund Yield of 2.7%.

<sup>1</sup> Theoretical Social Security is the current Social Security program with the assumption that the law is modified to permit borrowing from the General Fund of the Treasury.

Office of the Chief Actuary  
Social Security Administration  
December 8, 2016

**Table 1b - OASDI Changes & Implications for Federal Budget and Debt of Specified Plan Provision Effects on OASDI<sup>1</sup> (Present Value Dollars)**  
**H.R. 6489, the "Social Security Reform Act of 2016," Introduced by Chairman Sam Johnson**

<i>Billions of Present Value Dollars as of 1-1-2016</i>							
<u>Year</u>	Specified General Fund Transfers	Basic Changes in OASDI Cash Flow	Change in Annual Unified Budget Cash Flow	Change in Debt Held by Public at End of Year	Change in Annual Unified Budget Balance	Change in Total Federal Debt End Of Year	Change in Annual On Budget Balance
	(1)	(2)	(3)	(4)	(5)	(6)	(7)
2016	0.0	0.0	0.0	0.0	0.0	0.0	0.0
2017	0.0	0.0	0.0	0.0	0.0	0.0	0.0
2018	0.0	0.0	0.0	0.0	0.0	0.0	0.0
2019	0.0	-16.0	-16.0	16.0	-16.0	0.0	0.0
2020	0.0	-9.4	-9.4	25.4	-9.9	0.0	0.0
2021	0.0	-3.3	-3.3	28.7	-4.1	0.0	0.0
2022	0.0	2.2	2.2	26.6	1.3	0.0	0.0
2023	0.0	7.7	7.7	18.9	6.8	0.0	0.0
2024	0.0	14.4	14.4	4.5	13.7	0.0	0.0
2025	0.0	21.3	21.3	-16.8	21.1	0.0	0.0
2026	0.0	28.4	28.4	-45.2	29.1	0.0	0.0
2027	0.0	36.7	36.7	-81.9	38.5	0.0	0.0
2028	0.0	45.9	45.9	-127.8	49.5	0.0	0.0
2029	0.0	58.8	58.8	-186.5	64.8	0.0	0.0
2030	0.0	72.5	72.5	-259.0	82.0	0.0	0.0
2031	0.0	87.7	87.7	-346.7	100.9	0.0	0.0
2032	0.0	103.2	103.2	-449.9	120.8	0.0	0.0
2033	0.0	117.5	117.5	-567.3	140.4	0.0	0.0
2034	0.0	130.6	130.6	-697.9	159.5	0.0	0.0
2035	0.0	142.9	142.9	-840.8	178.4	0.0	0.0
2036	0.0	154.3	154.3	-995.1	197.1	0.0	0.0
2037	0.0	165.0	165.0	-1,160.1	215.8	0.0	0.0
2038	0.0	174.8	174.8	-1,334.9	233.9	0.0	0.0
2039	0.0	183.3	183.3	-1,518.2	251.3	0.0	0.0
2040	0.0	190.8	190.8	-1,709.0	268.2	0.0	0.0
2041	0.0	197.3	197.3	-1,906.3	284.4	0.0	0.0
2042	0.0	203.2	203.2	-2,109.4	300.3	0.0	0.0
2043	0.0	208.6	208.6	-2,318.0	316.1	0.0	0.0
2044	0.0	213.5	213.5	-2,531.5	331.6	0.0	0.0
2045	0.0	215.4	215.4	-2,747.0	344.5	0.0	0.0
2046	0.0	217.5	217.5	-2,964.4	357.5	0.0	0.0
2047	0.0	219.2	219.2	-3,183.6	370.3	0.0	0.0
2048	0.0	220.8	220.8	-3,404.4	383.0	0.0	0.0
2049	0.0	222.1	222.1	-3,626.5	395.7	0.0	0.0
2050	0.0	223.3	223.3	-3,849.9	408.2	0.0	0.0
2051	0.0	224.5	224.5	-4,074.4	420.7	0.0	0.0
2052	0.0	225.5	225.5	-4,299.9	433.1	0.0	0.0
2053	0.0	226.2	226.2	-4,526.1	445.4	0.0	0.0
2054	0.0	203.1	203.1	-4,729.2	433.8	0.0	0.0
2055	0.0	204.6	204.6	-4,933.7	445.6	0.0	0.0
2056	0.0	205.9	205.9	-5,139.6	457.4	0.0	0.0
2057	0.0	207.0	207.0	-5,346.7	469.0	0.0	0.0
2058	0.0	207.9	207.9	-5,554.5	480.4	0.0	0.0
2059	0.0	208.4	208.4	-5,763.0	491.5	0.0	0.0
2060	0.0	208.7	208.7	-5,971.7	502.4	0.0	0.0
2061	0.0	208.6	208.6	-6,180.3	513.0	0.0	0.0
2062	0.0	208.4	208.4	-6,388.7	523.4	0.0	0.0
2063	0.0	208.1	208.1	-6,596.8	533.7	0.0	0.0
2064	0.0	207.8	207.8	-6,804.6	544.0	0.0	0.0
2065	0.0	207.4	207.4	-7,011.9	554.2	0.0	0.0
2066	0.0	206.8	206.8	-7,218.7	564.2	0.0	0.0
2067	0.0	206.3	206.3	-7,425.1	574.2	0.0	0.0
2068	0.0	205.9	205.9	-7,630.9	584.3	0.0	0.0
2069	0.0	205.4	205.4	-7,836.3	594.3	0.0	0.0
2070	0.0	204.8	204.8	-8,041.1	604.2	0.0	0.0
2071	0.0	204.3	204.3	-8,245.4	614.1	0.0	0.0
2072	0.0	203.7	203.7	-8,449.1	623.9	0.0	0.0
2073	0.0	203.0	203.0	-8,652.2	633.7	0.0	0.0
2074	0.0	202.4	202.4	-8,854.6	643.4	0.0	0.0
2075	0.0	201.5	201.5	-9,056.0	652.8	0.0	0.0
2076	0.0	200.4	200.4	-9,256.5	662.0	0.0	0.0
2077	0.0	199.3	199.3	-9,455.8	671.0	0.0	0.0
2078	0.0	198.1	198.1	-9,653.8	680.0	0.0	0.0
2079	0.0	196.8	196.8	-9,850.7	688.9	0.0	0.0
2080	0.0	195.6	195.6	-10,046.3	697.6	0.0	0.0
2081	0.0	194.2	194.2	-10,240.4	706.2	0.0	0.0
2082	0.0	192.9	192.9	-10,433.4	714.8	0.0	0.0
2083	0.0	191.8	191.8	-10,625.2	723.5	0.0	0.0
2084	0.0	190.8	190.8	-10,816.0	732.4	0.0	0.0
2085	0.0	190.0	190.0	-11,006.0	741.2	0.0	0.0
2086	0.0	189.4	189.4	-11,195.4	750.3	0.0	0.0
2087	0.0	188.8	188.8	-11,384.2	759.4	0.0	0.0
2088	0.0	188.2	188.2	-11,572.4	768.4	0.0	0.0
2089	0.0	187.5	187.5	-11,760.0	777.3	0.0	0.0
2090	0.0	186.9	186.9	-11,946.9	786.2	0.0	0.0
Total 2016-2090	0.0	11,946.9	11,946.9				

Based on Intermediate Assumptions of the 2016 Trustees Report.  
Ultimate Real Trust Fund Yield of 2.7%.

Note: Changes reflect the budget scoring convention that presumes benefits not payable after reserve depletion would nonetheless be paid, based on transfers from the General Fund of the Treasury resulting in additional borrowing from the public.

<sup>1</sup> Effects of tax provisions on the On-Budget are not reflected in this table.

Office of the Chief Actuary  
Social Security Administration  
December 8, 2016

**Table 1b.n - OASDI Changes & Implications for Federal Budget and Debt of Specified Plan Provision Effects on OASDI<sup>1</sup> (Nominal Dollars)**  
**H.R. 6489, the "Social Security Reform Act of 2016," Introduced by Chairman Sam Johnson**

<i>Billions of Nominal Dollars</i>							
<u>Year</u>	Specified General Fund Transfers	Basic Changes in OASDI Cash Flow	Change in Annual Unified Budget Cash Flow	Change in Debt Held by Public at End of Year	Change in Annual Unified Budget Balance	Change in Total Federal Debt End of Year	Change in Annual On Budget Balance
	(1)	(2)	(3)	(4)	(5)	(6)	(7)
2016	0.0	0.0	0.0	0.0	0.0	0.0	0.0
2017	0.0	0.0	0.0	0.0	0.0	0.0	0.0
2018	0.0	0.0	0.0	0.0	0.0	0.0	0.0
2019	0.0	-17.9	-17.9	18.1	-18.1	0.0	0.0
2020	0.0	-10.8	-10.8	29.7	-11.6	0.0	0.0
2021	0.0	-3.9	-3.9	34.6	-4.9	0.0	0.0
2022	0.0	2.7	2.7	32.9	1.7	0.0	0.0
2023	0.0	9.7	9.7	24.0	9.0	0.0	0.0
2024	0.0	18.8	18.8	5.4	18.5	0.0	0.0
2025	0.0	28.9	28.9	-24.1	29.5	0.0	0.0
2026	0.0	40.1	40.1	-66.2	42.1	0.0	0.0

Based on Intermediate Assumptions of the 2016 Trustees Report.

Note: Changes reflect the budget scoring convention that presumes benefits not payable after reserve depletion would nonetheless be paid, based on transfers from the General Fund of the Treasury resulting in additional borrowing from the public.

<sup>1</sup> Effects of tax provisions on the On-Budget are not reflected in this table.

Office of the Chief Actuary  
Social Security Administration  
December 8, 2016

**Table 1c - Present Law and Proposal Cost, Expenditures, and Income: As Percent of Gross Domestic Product**  
**H.R. 6489, the "Social Security Reform Act of 2016," Introduced by Chairman Sam Johnson**

Calendar Year	Present Law OASDI			Proposal OASDI		
	Cost (1)	Expenditures (Payable) (2)	Non-Interest Income (3)	Cost (4)	Expenditures (Payable) (5)	Non-Interest Income (6)
2016	4.98	4.98	4.59	4.98	4.98	4.59
2017	4.91	4.91	4.62	4.91	4.91	4.62
2018	4.98	4.98	4.65	4.98	4.98	4.65
2019	5.05	5.05	4.68	5.13	5.13	4.68
2020	5.12	5.12	4.70	5.17	5.17	4.70
2021	5.18	5.18	4.72	5.20	5.20	4.73
2022	5.28	5.28	4.75	5.27	5.27	4.75
2023	5.39	5.39	4.77	5.35	5.35	4.77
2024	5.50	5.50	4.79	5.43	5.43	4.79
2025	5.60	5.60	4.81	5.50	5.50	4.80
2026	5.67	5.67	4.81	5.53	5.53	4.80
2027	5.73	5.73	4.81	5.55	5.55	4.80
2028	5.78	5.78	4.81	5.55	5.55	4.80
2029	5.83	5.83	4.81	5.54	5.54	4.79
2030	5.87	5.87	4.81	5.51	5.51	4.79
2031	5.91	5.91	4.80	5.47	5.47	4.79
2032	5.94	5.94	4.80	5.42	5.42	4.78
2033	5.96	5.96	4.80	5.36	5.36	4.77
2034	5.98	5.29	4.80	5.30	5.30	4.77
2035	5.98	4.79	4.79	5.24	5.24	4.76
2036	6.00	4.79	4.79	5.18	5.18	4.75
2037	6.01	4.79	4.79	5.13	5.13	4.75
2038	6.01	4.78	4.78	5.07	5.07	4.74
2039	6.00	4.78	4.78	5.01	5.01	4.73
2040	5.99	4.78	4.78	4.95	4.95	4.73
2041	5.97	4.77	4.77	4.89	4.89	4.72
2042	5.96	4.77	4.77	4.83	4.83	4.71
2043	5.94	4.77	4.77	4.77	4.77	4.71
2044	5.93	4.76	4.76	4.72	4.72	4.70
2045	5.92	4.76	4.76	4.67	4.67	4.69
2046	5.91	4.76	4.76	4.63	4.63	4.67
2047	5.90	4.76	4.76	4.59	4.59	4.66
2048	5.89	4.76	4.76	4.55	4.55	4.64
2049	5.88	4.75	4.75	4.51	4.51	4.63
2050	5.87	4.75	4.75	4.47	4.47	4.62
2051	5.87	4.75	4.75	4.44	4.44	4.61
2052	5.87	4.75	4.75	4.42	4.42	4.60
2053	5.88	4.75	4.75	4.40	4.40	4.59
2054	5.89	4.75	4.75	4.39	4.39	4.44
2055	5.90	4.74	4.74	4.38	4.38	4.44
2056	5.91	4.74	4.74	4.37	4.37	4.44
2057	5.92	4.74	4.74	4.36	4.36	4.44
2058	5.94	4.74	4.74	4.36	4.36	4.43
2059	5.95	4.74	4.74	4.35	4.35	4.43
2060	5.97	4.74	4.74	4.35	4.35	4.43
2061	5.98	4.73	4.73	4.35	4.35	4.43
2062	5.99	4.73	4.73	4.35	4.35	4.42
2063	6.01	4.73	4.73	4.35	4.35	4.42
2064	6.02	4.73	4.73	4.35	4.35	4.41
2065	6.03	4.72	4.72	4.35	4.35	4.41
2066	6.04	4.72	4.72	4.35	4.35	4.41
2067	6.06	4.72	4.72	4.36	4.36	4.40
2068	6.07	4.71	4.71	4.36	4.36	4.40
2069	6.08	4.71	4.71	4.36	4.36	4.39
2070	6.09	4.71	4.71	4.36	4.36	4.39
2071	6.10	4.70	4.70	4.36	4.36	4.39
2072	6.11	4.70	4.70	4.36	4.36	4.38
2073	6.12	4.70	4.70	4.36	4.36	4.38
2074	6.12	4.69	4.69	4.35	4.35	4.37
2075	6.13	4.69	4.69	4.34	4.34	4.37
2076	6.12	4.68	4.68	4.33	4.33	4.36
2077	6.12	4.68	4.68	4.32	4.32	4.36
2078	6.11	4.67	4.67	4.31	4.31	4.35
2079	6.11	4.67	4.67	4.30	4.30	4.35
2080	6.10	4.66	4.66	4.29	4.29	4.34
2081	6.09	4.66	4.66	4.28	4.28	4.34
2082	6.09	4.66	4.66	4.27	4.27	4.34
2083	6.09	4.65	4.65	4.26	4.26	4.33
2084	6.09	4.65	4.65	4.26	4.26	4.33
2085	6.09	4.64	4.64	4.25	4.25	4.33
2086	6.10	4.64	4.64	4.25	4.25	4.32
2087	6.11	4.64	4.64	4.25	4.25	4.32
2088	6.12	4.64	4.64	4.25	4.25	4.32
2089	6.13	4.63	4.63	4.25	4.25	4.31
2090	6.14	4.63	4.63	4.25	4.25	4.31

Based on Intermediate Assumptions of the 2016 Trustees Report.

Office of the Chief Actuary  
Social Security Administration  
December 8, 2016



**Table 1d - Change in Long-Range Trust Fund Reserves / Unfunded Obligation**  
**H.R. 6489, the "Social Security Reform Act of 2016," Introduced by Chairman Sam Johnson**

(Billions of Dollars, Present Value on 1-1-2016)						
Year	Present Law OASDI Trust Fund Reserves / Unfunded Obligation Through End of Year (1)	Changes in OASDI Income (2)	Changes in OASDI Cost (3)	Basic Changes in OASDI Cash Flow (4) = (2)-(3)	Total Change Through End of Year (5) = cumulative sum(4)	Proposal OASDI Trust Fund Reserves / Unfunded Obligation Through End of Year (6) = (1)+(5)
2016	2,741.0	0.0	0.0	0.0	0.0	2,741.0
2017	2,687.5	0.0	0.0	0.0	0.0	2,687.5
2018	2,625.9	0.0	0.0	0.0	0.0	2,625.9
2019	2,554.4	0.9	16.9	-16.0	-16.0	2,538.4
2020	2,471.7	0.6	10.0	-9.4	-25.4	2,446.3
2021	2,378.9	0.3	3.6	-3.3	-28.7	2,350.2
2022	2,270.6	0.1	-2.1	2.2	-26.6	2,244.0
2023	2,142.4	-0.2	-7.9	7.7	-18.9	2,123.5
2024	1,994.9	-0.5	-14.9	14.4	-4.5	1,990.4
2025	1,827.2	-0.9	-22.2	21.3	16.8	1,844.0
2026	1,645.4	-1.3	-29.7	28.4	45.2	1,690.7
2027	1,450.6	-1.7	-38.3	36.7	81.9	1,532.5
2028	1,244.3	-2.1	-47.9	45.9	127.8	1,372.1
2029	1,028.4	-2.7	-61.4	58.8	186.5	1,214.9
2030	804.8	-3.3	-75.8	72.5	259.0	1,063.8
2031	575.3	-4.0	-91.7	87.7	346.7	922.0
2032	341.0	-4.7	-107.9	103.2	449.9	790.9
2033	103.7	-5.4	-122.9	117.5	567.3	671.1
2034	-134.7	-6.1	-136.7	130.6	697.9	563.2
2035	-372.8	-6.8	-149.6	142.9	840.8	467.9
2036	-612.3	-7.5	-161.8	154.3	995.1	382.7
2037	-852.1	-8.2	-173.2	165.0	1,160.1	308.0
2038	-1,090.4	-8.8	-183.6	174.8	1,334.9	244.5
2039	-1,326.1	-9.3	-192.6	183.3	1,518.2	192.1
2040	-1,558.1	-9.8	-200.6	190.8	1,709.0	150.8
2041	-1,786.1	-10.2	-207.5	197.3	1,906.3	120.2
2042	-2,010.0	-10.6	-213.8	203.2	2,109.4	99.4
2043	-2,229.8	-11.0	-219.6	208.6	2,318.0	88.3
2044	-2,445.4	-11.3	-224.8	213.5	2,531.5	86.1
2045	-2,657.8	-14.1	-229.5	215.4	2,747.0	89.1
2046	-2,866.7	-16.3	-233.8	217.5	2,964.4	97.7
2047	-3,072.2	-18.4	-237.6	219.2	3,183.6	111.5
2048	-3,274.5	-20.3	-241.1	220.8	3,404.4	129.9
2049	-3,473.9	-22.0	-244.1	222.1	3,626.5	152.6
2050	-3,670.6	-23.4	-246.8	223.3	3,849.9	179.2
2051	-3,865.4	-24.7	-249.2	224.5	4,074.4	208.9
2052	-4,059.0	-25.8	-251.3	225.5	4,299.9	240.9
2053	-4,251.9	-26.8	-253.0	226.2	4,526.1	274.2
2054	-4,444.5	-51.4	-254.4	203.1	4,729.2	284.7
2055	-4,637.2	-51.0	-255.6	204.6	4,933.7	296.5
2056	-4,830.5	-50.7	-256.6	205.9	5,139.6	309.2
2057	-5,024.3	-50.4	-257.4	207.0	5,346.7	322.3
2058	-5,218.8	-50.1	-257.9	207.9	5,554.5	335.7
2059	-5,413.9	-49.8	-258.2	208.4	5,763.0	349.1
2060	-5,609.6	-49.5	-258.2	208.7	5,971.7	362.1
2061	-5,805.8	-49.1	-257.7	208.6	6,180.3	374.5
2062	-6,002.5	-48.8	-257.2	208.4	6,388.7	386.2
2063	-6,199.6	-48.5	-256.6	208.1	6,596.8	397.2
2064	-6,397.1	-48.2	-255.9	207.8	6,804.6	407.5
2065	-6,595.0	-47.8	-255.2	207.4	7,011.9	417.0
2066	-6,793.3	-47.5	-254.3	206.8	7,218.7	425.5
2067	-6,992.1	-47.2	-253.5	206.3	7,425.1	433.0
2068	-7,191.4	-46.9	-252.8	205.9	7,630.9	439.6
2069	-7,391.0	-46.6	-251.9	205.4	7,836.3	445.3
2070	-7,591.0	-46.2	-251.1	204.8	8,041.1	450.1
2071	-7,791.2	-45.9	-250.2	204.3	8,245.4	454.2
2072	-7,991.1	-45.6	-249.3	203.7	8,449.1	458.1
2073	-8,190.5	-45.2	-248.2	203.0	8,652.2	461.7
2074	-8,389.1	-44.8	-247.2	202.4	8,854.6	465.4
2075	-8,586.7	-44.5	-246.0	201.5	9,056.0	469.4
2076	-8,782.6	-44.1	-244.5	200.4	9,256.5	473.8
2077	-8,976.7	-43.7	-243.0	199.3	9,455.8	479.0
2078	-9,168.8	-43.2	-241.3	198.1	9,653.8	485.1
2079	-9,358.6	-42.8	-239.6	196.8	9,850.7	492.1
2080	-9,546.2	-42.3	-237.9	195.6	10,046.3	500.1
2081	-9,731.8	-41.9	-236.0	194.2	10,240.4	508.7
2082	-9,915.6	-41.4	-234.3	192.9	10,433.4	517.8
2083	-10,098.0	-41.0	-232.8	191.8	10,625.2	527.2
2084	-10,279.3	-40.6	-231.4	190.8	10,816.0	536.7
2085	-10,459.9	-40.2	-230.2	190.0	11,006.0	546.1
2086	-10,639.8	-39.9	-229.3	189.4	11,195.4	555.6
2087	-10,819.4	-39.5	-228.3	188.8	11,384.2	564.8
2088	-10,998.8	-39.2	-227.4	188.2	11,572.4	573.7
2089	-11,177.9	-38.9	-226.4	187.5	11,760.0	582.1
2090	-11,356.8	-38.6	-225.4	186.9	11,946.9	590.0
Total 2016-2090		-1989.1	-13936.0	11946.9		

Based on Intermediate Assumptions of the 2016 Trustees Report.

Ultimate Real Trust Fund Yield of 2.7%.

Office of the Chief Actuary  
Social Security Administration  
December 8, 2016

Social Security Administration  
Sole Source Contracts

We provided a list of the contracts identified in the Federal Procurement Data System (FPDS) as sole source for the last 24 months (December 1, 2014 – December 1, 2016). We sorted the list in descending order by the Base and All Options amount of the contract. De-obligating actions are in red and located at the end of the list.

In March 2009, the President directed agencies to refrain from awarding non-competitive contracts except where their use is fully justified. To comply with these directives, in May 2010, we established a Competition Advocate Review Board (CARB) to review Justifications for Other Than Full and Open Competition (JOFOC), Limited Source Justifications (LSJ), Sole Source Justifications (SSJ), and Justifications for an Exception to Fair Opportunity (JEFO). The CARB is internal to the agency and advisory to the Competition Advocate and Senior Procurement Executive (SPE). CARB members include Office of Acquisition and Grants (OAG) officials, the Office of the General Counsel, and other senior managers determined appropriate by the Competition Advocate and SPE.

We have a high rate of contracts noted as sole source due to a number of reasons:

- **Medical Expert (ME), Vocational Expert (VE), Medical Consultant (MC), and Verbatim Hearing Reporter (VHR) Case Review Blanket Purchase Agreements (BPA)** – The ME, VE, MC, and VHR BPAs support Operations and the Office of Disability Adjudication and Review by contracting with individuals directly to provide services to support disability case reviews. These BPAs are not competed in the sense that, if the vendor meets the requirements and is willing to perform at our price or less, the vendor gets a BPA. We are currently working with our stakeholders to change this process. The new process will be less cumbersome and award competitive single-provider requirements contracts for each region.
- **Birth and Death Records** – We award these contracts to State and local Bureaus of Vital Statistics (government agencies), which are the only entities that maintain official birth and death records.
- **Software and Hardware Maintenance** – Our agency has more than 60,000 employees nationwide and two modern co-processing data centers, each with full failover capabilities. We need certain software and hardware products and maintenance for continuous processing, compatibility, and failover. Due to the brands required, we have limited sources. In many instances, we compete our requirements among resellers, but because the products are peculiar to one manufacturer, we report them as sole source. We measure pricing against schedules and market research and often acquire discounts due to the size of our business.
- **Transparent Approach** – We have a respect for industry and do work in advance to determine whether there is competition available. We also publish all of our justifications and allow challenges from vendors; although historically, we have received very few.

Sole Source Contracts  
(December 1, 2014 - December 1, 2016)

Vendor Name	Description of Requirement	Action Obligation	Base and All Options Value	Fiscal Year	Date Signed	PO/Delivery Order/Task Order/Call#	Parent Contract	Mod #	Contracting Officers Business Size Selection
INTERNATIONAL BUSINESS MACHINES CORPORATION	MAINFRAME HARDWARE, CAPACITY UPGRADES AND AS	\$300,000.00	\$810,000,000.00	2016	6/17/2016	SS001660010		0	OTHER THAN SMALL BUSINESS
DLT SOLUTIONS INCORPORATED	DISSAO CURRENTLY UTILIZES THE DELL CHANGEAUDITOR	\$1,390,200.00	\$7,911,675.64	2015	5/28/2015	SS001530527	W91QUZ06A0004	0	SMALL BUSINESS
INTERNATIONAL BUSINESS MACHINES CORPORATION	ANNUAL MAINTENANCE OFF CONTRACT SS00-16-60010.	\$6,580,084.97	\$6,880,084.97	2016	6/27/2016	SS001630476	SS001660010	0	OTHER THAN SMALL BUSINESS
	NATIONAL SUPPORT CENTER ARMED PROTECTIVE SECURITY SERVICES BRIDGE CONTRACT								
CENTERRA GROUP, LLC	FPDS FUNCTION - IGF::CT::IGF	\$2,799,654.66	\$5,607,335.52	2016	8/31/2016	SS001660047		0	OTHER THAN SMALL BUSINESS
PHOENIX SOFTWARE INTERNATIONAL, INC.	MAINTENANCE ON PHOENIX SOFTWARE PRODUCTS; (E)	\$1,059,829.00	\$5,328,917.00	2015	3/25/2015	SS001560023		0	OTHER THAN SMALL BUSINESS
GOODWILL INDUSTRIES OF THE CHESAPEAKE INCORPORATED	FOLLOW-ON YEAR 8: SS00-08-60004	\$5,160,617.23	\$5,160,617.23	2016	2/24/2016	SS000860004		31	OTHER THAN SMALL BUSINESS
DLT SOLUTIONS INCORPORATED	DELL WINDOWS MANAGEMENT AND QUEST ENTERPRISE	\$4,884,845.60	\$5,060,186.44	2016	4/28/2016	SS001530527	W91QUZ06A0004	2	SMALL BUSINESS
GOODWILL INDUSTRIES OF THE CHESAPEAKE INCORPORATED	ADMIN. MOD.	\$5,030,182.46	\$5,030,182.46	2015	2/27/2015	SS000860004		29	OTHER THAN SMALL BUSINESS
	IGF::CT::IGF CONTRACT FOR PRINTING OF SSN CARDS AND NOTICES AT NCC	\$0.00	\$4,541,686.80	2016	11/13/2015	SS001660006		0	SMALL BUSINESS
FALON SOURCING SOLUTIONS LLC									
PITNEY BOWES INC.	IGF::OT::IGF CONTINUE MAINTENANCE OF PITNEY BOWES MAIL INSERTERS AND RELATED SOFTWARE.	\$691,632.00	\$4,362,912.00	2015	6/26/2015	SS001560041		0	OTHER THAN SMALL BUSINESS
	IGF::OT::IGF ARMED GUARD SERVICES - SECOND SUPPORT CENTER THE SOCIAL SECURITY ADMINISTRATION REQUIRES ARMED AND OTHER PROTECTIVE SECURITY SERVICES TO PROTECT PEOPLE AND PROPERTY AT THE SOCIAL SECURITY ADMINISTRATIONS SECOND SUPPORT CENTER AND ADJUNCT RTP (RESEARCH TRIANGLE PARK) BUILDING IN DURHAM, NORTH CAROLINA.	\$2,108,772.00	\$4,237,006.50	2016	7/8/2016	SS001660027		0	SMALL BUSINESS
XCEL PROTECTIVE SERVICES, INC.									
	IGF::OT::IGF: SS00-11-60059 TO 0081 - MICROPACT IT ENGINEERING SUPPORT SERVICES FOR IMPLEMENTATION OF NVF SWITCH AND EFI RELEASE 28.0/29.0/30.0/31.0	\$4,186,644.50	\$4,186,644.50	2016	9/20/2016		81 SS001160059	0	OTHER THAN SMALL BUSINESS
IRON DATA SOLUTIONS, INC. (DE)									
ROCKET SOFTWARE, INC.	NEW CONTRACT FOR PERPETUAL UNLIMITED LICENSING	\$1,718,903.00	\$4,045,307.00	2015	8/18/2015	SS001560048		0	OTHER THAN SMALL BUSINESS
CREATIVE BUSINESS SOLUTIONS, INC.	IGF::OT::IGF LABOR AND MOVING SERVICE CONTRACT	\$1,447,215.50	\$3,988,572.51	2015	7/16/2015	SS001560040		0	SMALL BUSINESS
LIFEBRIDGE HEALTH INCORPORATED	JANITORIAL/CUSTODIAL SERVICES AT THE SSA NCC IN W	\$3,721,563.20	\$3,721,563.20	2016	7/22/2016	SS000860001		29	OTHER THAN SMALL BUSINESS
LIFEBRIDGE HEALTH INCORPORATED	JANITORIAL/CUSTODIAL SERVICES AT THE SSA NCC IN W	\$3,660,291.75	\$3,660,291.75	2015	7/16/2015	SS000860001		28	OTHER THAN SMALL BUSINESS
	IGF::CT::IGF SSA REQUIRES TRANSPORTATION SERVICES AT THEIR HEADQUARTERS COMPLEX IN BALTIMORE, MARYLAND, HOTELS IN THE BALTIMORE METROPOLITAN AREA, AND IN WASHINGTON, D.C.	\$676,290.00	\$3,437,811.96	2016	9/26/2016	SS001660052		0	SMALL BUSINESS
W & T TRAVEL SERVICES LLC									
INTERNATIONAL BUSINESS MACHINES CORPORATION	SS00-16-60010 - MAINFRAME HARDWARE UPGRADE - DI	\$3,144,100.43	\$3,144,100.43	2017	10/26/2016	SS001730008	SS001660010	0	OTHER THAN SMALL BUSINESS
SYNCSORT INCORPORATED	SOFTWARE MAINTENANCE AND LICENSE UPGRADES FOR	\$276,742.30	\$2,935,426.64	2015	9/25/2015	SS001560062		0	OTHER THAN SMALL BUSINESS
NATIONAL DISABILITY RIGHTS NETWORK INC	REPRESENTATIVE PAYEE REVIEWS	\$265,568.22	\$2,508,068.22	2015	8/25/2015	SS000960111		26	OTHER THAN SMALL BUSINESS
DINO SOFTWARE CORPORATION	FY15 DINO T. REX RECOMPETE	\$427,913.93	\$2,504,104.67	2015	7/23/2015	SS001550208		0	SMALL BUSINESS
	IGF::CL::IGF								
NATIONAL DISABILITY RIGHTS NETWORK INC	REPRESENTATIVE PAYEE REVIEWS	\$2,242,500.00	\$2,242,500.00	2015	8/25/2015	SS001530883	SS000960111	0	OTHER THAN SMALL BUSINESS
FALON SOURCING SOLUTIONS LLC	SECOND SUPPORT CENTER (SSC) PRINT MAIL FACILITY	\$0.00	\$2,196,379.08	2016	11/18/2015	SS001660005		0	SMALL BUSINESS
THE ARC OF BALTIMORE INCORPORATED (1428)	FOLLOW-ON YEAR 9 - GROUNDS MAINTENANCE	\$2,122,728.38	\$2,122,728.38	2016	7/25/2016	SS000860012		50	OTHER THAN SMALL BUSINESS
MAZDA COMPUTER CORPORATION	PURCHASE ACTION SOFTWARE INTERNATIONAL EVENTA	\$1,200,000.00	\$2,064,000.00	2015	7/29/2015	SS001560044		0	OTHER THAN SMALL BUSINESS
	FUNDING FOR HM FURNITURE PROJECTS HAVING A BONA FIDE NEED IN FY 2015								
HERMAN MILLER, INC.	SCHEDULE: MULTIPLE SITES INVOLVED. PERIOD OF PERFORMANCE TO BE DETERMINED. ATTACHED SPREADSHEET INCLUDES AN ESTIMATE COMPLETED DATE PER SITE.	\$1,980,524.28	\$1,980,524.28	2015	9/15/2015	SS001530979	SS001260003	0	OTHER THAN SMALL BUSINESS

Sole Source Contracts  
(December 1, 2014 - December 1, 2016)

Vendor Name	Description of Requirement	Action Obligation	Base and All Options Value	Fiscal Year	Date Signed	PO/Delivery Order/Task Order/Call#	Parent Contract	Mod #	Contracting Officers Business Size Selection
TETON DATA SYSTEMS INC	IGF::CT::IGF STATIREF SUBSCRIPTION RENEWAL	\$306,250.00	\$1,969,390.00	2015	2/19/2015	SS001550052		0	SMALL BUSINESS
PITNEY BOWES GLOBAL FINANCIAL SERVICES LLC	SS00-13-60018 MAINTENANCE SERVICE AND METER REN	\$1,861,666.00	\$1,861,666.00	2015	6/30/2015	SS001530672	SS001360018	0	OTHER THAN SMALL BUSINESS
HENSEL PHELPS SERVICES LLC	IGF::OT::IGF	\$1,590,237.00	\$1,590,237.00	2016	7/22/2016	SS001461106		8	OTHER THAN SMALL BUSINESS
PACIFIC GAS AND ELECTRIC COMPANY	IGF::CT::IGF PG&E UTILITY SERVICES FOR FHFB. ELECTRIC	\$1,493,652.00	\$1,493,652.00	2016	6/27/2016	SS091630003	GS00P07BSD0505	0	OTHER THAN SMALL BUSINESS
	IGF::OT::IGF THIS IS A COST REIMBURSEMENT TASK ORDER FOR THE NATIONAL ACADEMY OF SCIENCES TO FORM A CONSENSUS COMMITTEE TO PROVIDE FINDINGS AND CONCLUSIONS ON IMPROVING HEALTH OUTCOMES FOR CHILDREN WITH DISABILITIES. THE COMMITTEE WILL: 1. PROVIDE A COMPREHENSIVE LIST OF PROGRAMS, SERVICES, AND TREATMENTS AVAILABLE (NATIONALLY, REGIONALLY, AND LOCALLY) FOR IMPROVING HEALTH OUTCOMES AMONG SSI CHILDREN (OF ALL AGES) WITH MENTAL, SPEECH, AND LANGUAGE DISORDERS, INCLUDING SSI YOUTH WITH MENTAL, SPEECH, AND LANGUAGE DISORDERS AS THEY TRANSITION FROM HIGH SCHOOL TO THE WORKPLACE OR HIGHER EDUCATION; 2. PROVIDE A COMPREHENSIVE, ANALYTICAL REVIEW OF EFFECTIVE AND EVIDENCE-BASED PROGRAMS, SERVICES, AND TREATMENTS THAT IMPROVE HEALTH OUTCOMES FOR SSI CHILDREN AND YOUTH WHILE IN SCHOOL AND AS THEY TRANSITION FROM HIGH SCHOOL TO THE WORKPLACE OR HIGHER EDUCATION; AND 3. PROVIDE FINDINGS AND CONCLUSIONS FOR SSA INVOLVEMENT AND FUTURE RESEARCH.	\$1,490,829.00	\$1,490,829.00	2016	6/3/2016		7 SS001360048	0	OTHER THAN SMALL BUSINESS
NATIONAL ACADEMY OF SCIENCES	THE PURPOSE OF THIS MODIFICATION IS NECESSARY TO EXERCISE FOLLOW-ON YEAR NINE (9) - JULY 1, 2016 TO JUNE 30, 2017.								
CROSSROADS BUILDING SERVICES INCORPORATED	N/A PRIOR 03/01/2012	\$1,459,561.62	\$1,459,561.62	2016	6/29/2016	SS000760045		33	OTHER THAN SMALL BUSINESS
	NAS/IOM TASK ORDER FOR A CONSENSUS COMMITTEE TO PROVIDE AN OVERVIEW OF ASSISTIVE DEVICES THAT RELATE TO PHYSICAL AND MENTAL DISORDERS AND FUNCTIONING FOR ADULTS (INCLUDING YOUNG ADULTS AS THEY TRANSITION FROM HIGH SCHOOL TO THE WORKPLACE)&TO PROVIDE A COMPREHENSIVE REVIEW OF SELECTED ASSISTIVE DEVICES THAT RELATE TO PHYSICAL AND MENTAL DISORDERS AND FUNCTIONING FOR ADULTS (INCLUDING YOUNG ADULTS AS THEY TRANSITION FROM HIGH SCHOOL TO THE WORKPLACE). THE SELECTED ASSISTIVE DEVICES INCLUDE WHEELED/SEATED MOBILITY DEVICES AND UPPER EXTREMITY PROSTHESES.	\$1,423,609.00	\$1,423,609.00	2015	9/9/2015		6 SS001360048	0	OTHER THAN SMALL BUSINESS
NATIONAL ACADEMY OF SCIENCES	IGF::OT::IGF	\$1,413,966.00	\$1,413,966.00	2016	6/29/2016	SS001630512	SS001360018	0	OTHER THAN SMALL BUSINESS
PITNEY BOWES GLOBAL FINANCIAL SERVICES LLC	BUY METER MAINTENANCE SERVICES AND POSTAGE ME								
	IGF::OT::IGF CONSENSUS STUDY COMMITTEE TO PROVIDE FINDINGS AND CONCLUSIONS ON HEALTH CARE UTILIZATIONS AND DISABILITY.	\$1,389,752.00	\$1,389,752.00	2016	8/29/2016		8 SS001360048	0	OTHER THAN SMALL BUSINESS
NATIONAL ACADEMY OF SCIENCES	IGF::CT::IGF FHFB UTILITIES - ELECTRICITY AND GAS (8/1/	\$1,389,444.00	\$1,389,444.00	2015	7/11/2015	SS091530013	GS00P07BSD0505	0	OTHER THAN SMALL BUSINESS
PACIFIC GAS AND ELECTRIC COMPANY									

Sole Source Contracts  
(December 1, 2014 - December 1, 2016)

Vendor Name	Description of Requirement	Action Obligation	Base and All Options Value	Fiscal Year	Date Signed	PO/Delivery Order/Task Order/Call#	Parent Contract	Mod #	Contracting Officers Business Size Selection
BIXAL SOLUTIONS INCORPORATED	IGF::OT::IGF SBA 8(A) IDIQ CONTRACT- BIXAL SOLUTIONS, INC.: WEBSITE DESIGN/DEVELOPMENT AND RELATED WEB CONTENT MANAGEMENT SYSTEM (WCMS) SERVICES.	\$0.00	\$1,307,522.34	2016	8/22/2016	SS001660007		0	SMALL BUSINESS
NATIONAL DISABILITY RIGHTS NETWORK INC	REPRESENTATIVE PAYEE REVIEWS - THE PURPOSE OF THE	\$132,784.11	\$1,254,034.11	2016	3/23/2016	SS000960111		28	OTHER THAN SMALL BUSINESS
HENSEL PHELPS SERVICES LLC	IGF::OT::IGF TWO MONTH EXTENSION	\$1,225,700.00	\$1,225,700.00	2017	11/23/2016	SS001461106		10	OTHER THAN SMALL BUSINESS
MICROSOFT CORPORATION SITZ IN REDMOND CORPORATION	IGF::CT::IGF TASK ORDER 27 AGAINST CONTRACT NUMBER	\$1,198,836.00	\$1,198,836.00	2016	6/30/2016		27	SS001360014	0 OTHER THAN SMALL BUSINESS
NATIONAL DISABILITY RIGHTS NETWORK INC	IGF::CT::IGF THE CONTRACTOR SHALL PROVIDE REPRESENTATIVE PAYEE REVIEWS.	\$1,121,250.00	\$1,121,250.00	2016	3/23/2016	SS001630252	SS000960111	0	OTHER THAN SMALL BUSINESS
MICROSOFT CORPORATION SITZ IN REDMOND CORPORATION	IGF::OT::IGF TASK ORDER 23 AGAINST MICROSOFT CONTRACT FOR CONTINUING SUPPORT SERVICES FROM MICROSOFT FOR LYNC SERVER 2013 AND SYSTEM CENTER CONFIGURATION MANAGER 2012 SOFTWARE.	\$371,791.00	\$1,115,383.00	2016	10/1/2015		23	SS001360014	0 OTHER THAN SMALL BUSINESS
FACTIVA, INC	IGF::CT::IGF SUBSCRIPTION RENEWAL TO FACTIVA.COM	\$202,694.40	\$1,086,941.40	2015	9/8/2015	SS001550153		0	OTHER THAN SMALL BUSINESS
TECHNICA LLC	IGF::CT::IGF THIS CONTRACT IS FOR SUPPLY TECHNICIANS TO RUN THE SUPPLY STORE AT ODAR IN FALLS CHURCH, VA.	\$205,881.96	\$1,045,600.80	2016	9/27/2016	SS001660055		0	SMALL BUSINESS
IRON DATA SOLUTIONS, INC. (DE)	IGF::OT::IGF IDIQ CONTRACT SS00-11-60059(IRON DATA SOLUTIONS, INC.) TASK ORDER 0075: CHANGE, ASSET, AND PROBLEM REPORTING SYSTEM (CAPRS)SUPPORT, NATIONAL VENDOR FILE (NVF)SYNCHRONIZATION PHASE III. PERIOD OF PERFORMANCE IS 09/25/2015 - 09/29/2016.	\$999,200.00	\$999,200.00	2015	7/24/2015		75	SS001160059	0 OTHER THAN SMALL BUSINESS
NOBIS ENTERPRISES, INC.	FILE CLERK SERVICES - CONTRACTOR SHALL PROVIDE FILE CLERK SERVICES TO THE CENTER FOR HUMAN RESOURCES (CHR) IN ACCORDANCE WITH THE STATEMENT OF WORK.								
DLT SOLUTIONS INCORPORATED	IGF::CT::IGF MAINTAIN DELL WINDOWS MANAGEMENT SOFTWARE	\$96,475.20	\$974,256.60	2016	3/3/2016	SS041660001		0	OTHER THAN SMALL BUSINESS
INTERNATIONAL BUSINESS MACHINES CORPORATION	MAINTAIN DELL WINDOWS MANAGEMENT SOFTWARE	\$972,148.50	\$972,148.50	2015	1/27/2015	SS001530230	W91QUZ06A0004	0	SMALL BUSINESS
	ACQUIRE MAINFRAME INFRASTRUCTURE HARDWARE FOR	\$966,900.00	\$966,900.00	2016	6/27/2016	SS001630478	SS001660010	0	OTHER THAN SMALL BUSINESS
EASTMAN KODAK COMPANY	IGF::OT::IGF MAINTENANCE OF TWO KODAK SOCIAL SECURITY CARD PRINTERS AND RELATED SOFTWARE.	\$138,298.74	\$962,750.10	2016	12/23/2015	SS001650047		0	OTHER THAN SMALL BUSINESS
IRON DATA SOLUTIONS, INC. (DE)	IGF::OT::IGF IDIQ CONTRACT SS00-11-60059(IRON DATA SOLUTIONS, INC.) TASK ORDER 0074: EFI RELEASE 28.0, 29.0, 30.0&31.0 USER NEEDS ANALYSIS, LIMITED ENGLISH PROFICIENCY (LEP) BASE + PILOT, WORKLOAD SUPPORT UNITS (WSU) EXPANSION BASE, PILOT + RETROFIT, DISABILITY HEARING OFFICE (DHO) SAMPLING PILOT + RETROFIT. PERIOD OF PERFORMANCE IS AWARD THROUGH 6 MONTHS.	\$894,602.50	\$894,602.50	2015	6/18/2015		74	SS001160059	0 OTHER THAN SMALL BUSINESS
CONSOLIDATED EDISON COMPANY OF NEW YORK, INC.	IGF::CT::IGF PROVIDE ELECTRIC UTILITY TRANSMISSION AND DISTRIBUTION SERVICE TO THE ADDABBO FEDERAL BUILDING.	\$890,000.00	\$890,000.00	2015	7/28/2015	SS021530006	GS00P14BSD1058	0	OTHER THAN SMALL BUSINESS

Sole Source Contracts  
(December 1, 2014 - December 1, 2016)

Vendor Name	Description of Requirement	Action Obligation	Base and All Options Value	Fiscal Year	Date Signed	PO/Delivery Order/Task Order/Call#	Parent Contract	Mod #	Contracting Officers Business Size Selection
CONSOLIDATED EDISON COMPANY OF NEW YORK, INC.	IGF::CT::IGF PROVIDE ELECTRIC UTILITY TRANSMISSION AND DISTRIBUTION SERVICE AT THE ADDABBO FEDERAL BUILDING AT 155-10 JAMAICA AVE, NY 11432 PERIOD OF PERFORMANCE FROM AUGUST 1, 2016 TO JUNE 31, 2017.  THE PURPOSE OF THIS MODIFICATION IS TO FIX THE ACCOUNT NUMBER. THE ACCOUNT NUMBER WAS MISSING A 0. THE CORRECT ACCOUNT NUMBER IS 295112 1300 0001 8.  ALL OTHER TERMS AND CONDITIONS REMAIN UNCHANGED.	\$840,000.00	\$840,000.00	2016	5/16/2016	SS021630006	GS00P14BSD1058	0	OTHER THAN SMALL BUSINESS
INTERNATIONAL BUSINESS MACHINES CORPORATION	MAINFRAME ZAAP AND ZIIP CAPACITY UPGRADES	\$779,733.96	\$779,733.96	2016	9/21/2016	SS001630732	SS001660010	0	OTHER THAN SMALL BUSINESS
COMPUWARE CORPORATION	IGF::CT::IGF SOLE SOURCE PURCHASE ORDER TO PROVIDE	\$732,465.00	\$732,465.00	2015	3/17/2015	SS001560020		0	OTHER THAN SMALL BUSINESS
THE ARC OF BALTIMORE INCORPORATED (1428)	THE ARC FOY8	\$2,200,484.97	\$683,129.97	2015	7/29/2015	SS000860012		47	OTHER THAN SMALL BUSINESS
ADMIRAL ELEVATOR COMPANY, INC.	REMOTE MONITORING OF ELEVATORS AND ESCALATORS AT SSA HEADQUARTERS  IGF::OT::IGF	\$642,394.00	\$642,394.00	2015	9/30/2015	SS001560066		0	SMALL BUSINESS
PUBLIC HEALTH, CALIFORNIA DEPARTMENT OF	IGF::CL::IGF CLOSELY ASSOCIATED CA-SS00-12-60007 ELECTRONIC DEATH REGISTRATION DELIVERY ORDER. EDR RECORDS 20,665. TOTAL COST \$57,347.35. PERIOD OF PERFORMANCE 1/01/2016 - 1/31/2016.	\$630,852.65	\$630,852.65	2016	1/19/2016	5	SS001260007	1	OTHER THAN SMALL BUSINESS
PUBLIC HEALTH, CALIFORNIA DEPARTMENT OF FEDCAP REHABILITATION SERVICES INC	IGF::OT::IGF OTHER FUNCTIONS CALIFORNIA ELECTRONIC DEATH RECORDS MODIFICATION EXTENDS THE PERIOD OF PERFORMANCE AND ADDS NUMBER OF RECEIPT OF DEATH RECORDS. PERIOD OF PERFORMANCE EXTENDED TO DECEMBER 31, 2015. NEPSC-CUSTODIAL SERVICE CONTRACT (NISH): THE PURCHASE ORDER	\$617,758.97 \$3,915,287.88	\$617,758.97 \$607,638.80	2015 2016	1/13/2015 8/19/2016	4 SS000960002	SS001260007	1 20	OTHER THAN SMALL BUSINESS OTHER THAN SMALL BUSINESS
GT SOFTWARE, INC.	MODIFICATION - CHANGE PERIOD OF PERFORMANCE ON TASK ORDER 27	\$163,969.20	\$597,509.74	2015	12/11/2014	SS001560008		0	SMALL BUSINESS
MICROSOFT CORPORATION SITZ IN REDMOND CORPORATION	IGF::CT::IGF MODIFICATION 0001 TO TASK ORDER 27 AND	\$585,687.00	\$585,687.00	2016	9/8/2016	27	SS001360014	1	OTHER THAN SMALL BUSINESS
HENSEL PHELPS SERVICES LLC	IGF::OT::IGF  ONE MONTH EXTENSION	\$557,758.00	\$557,758.00	2016	9/27/2016	SS001461106		9	OTHER THAN SMALL BUSINESS

Sole Source Contracts  
(December 1, 2014 - December 1, 2016)

Vendor Name	Description of Requirement	Action Obligation	Base and All Options Value	Fiscal Year	Date Signed	PO/Delivery Order/Task Order/Call#	Parent Contract	Mod #	Contracting Officers Business Size Selection
	IGF::CT::IGF OSOHE REQUIRES MICROSOFT PROPRIETARY SUPPORT SERVICES FOR ENGINEERING AND CONSULTING TO ASSIST SSA WITH FURTHER DEVELOPING THE EXCHANGE 2013 INFRASTRUCTURE. THIS INCLUDES DEVELOPMENT, TESTING, AND IMPLEMENTATION OF ADDITIONAL REQUIREMENTS ASSOCIATED WITH THE MESSAGING INFRASTRUCTURE. THESE NEW REQUIREMENTS AND INFRASTRUCTURES WILL ENHANCE THE AGENCY'S CAPABILITIES DRIVEN BY POLICY AND ORGANIZATIONAL OPERATIONS DECISIONS.  AT A MINIMUM, THE CONTRACTOR WILL PROVIDE THE TASKS, ACTIVITIES AND DELIVERABLES DESCRIBED IN THE SOW. THE CONTRACTOR WILL SUBMIT DOCUMENTS AND DELIVERABLES IN MICROSOFT OFFICE 10, PROJECT 2010, OR VISIO PROFESSIONAL 2010 FORMAT; OR THE CURRENT VERSION OF THESE DOCUMENTS AS AVAILABLE TO AGENCY EMPLOYEES INVOLVED WITH THIS TASK UNDER OUR LICENSING AGREEMENT WITH MICROSOFT.	\$551,460.00	\$551,460.00	2016	6/28/2016	25	SS001360014	0	OTHER THAN SMALL BUSINESS
MICROSOFT CORPORATION SITZ IN REDMOND CORPORATION	IGF::CT::IGF FIRM FIXED PRICE TASK ORDER TO PROVIDE	\$137,865.00	\$551,460.00	2017	10/1/2016	30	SS001360014	0	OTHER THAN SMALL BUSINESS
	IGF::OT::IGF  TASK ORDER 24 IS BEING PLACED AGAINST CONTRACT SS00-13-60014. THIS TASK ORDER IS FOR MICROSOFT TO ASSISTANCE WITH THE MIGRATION FROM SHAREPOINT 2010 TO 2013 FOR COLLABORATION.	\$549,407.00	\$549,407.00	2016	2/18/2016	24	SS001360014	0	OTHER THAN SMALL BUSINESS
MICROSOFT CORPORATION SITZ IN REDMOND CORPORATION	IGF::OT::IGF  TASK ORDER 21 AGAINST MICROSOFT CONTRACT FOR CONTINUING SUPPORT SERVICES FROM MICROSOFT FOR WINDOWS 10 DEPLOYMENT AND IMAGE OPTIMIZATION.	\$542,832.00	\$542,832.00	2015	8/21/2015	21	SS001360014	0	OTHER THAN SMALL BUSINESS
MICROSOFT CORPORATION SITZ IN REDMOND CORPORATION	POTOMAC EDISON COMPANY, THE	DELIVERY ORDER AGAINST GSA CONTRACT NUMBER GS-	\$541,944.00	2015	7/22/2015	SS001530732	GS00P08BSD0539	0	OTHER THAN SMALL BUSINESS
	DELIVERY ORDER AGAINST GSA CONTRACT NUMBER GS-00P-08-BSD-0539 TO PROVIDE LOCAL DISTRIBUTION OF ELECTRIC POWER TO THE NATIONAL SUPPORT CENTER IN URBANA	\$533,944.00	\$533,944.00	2016	7/22/2016	SS001630506	GS00P08BSD0539	0	OTHER THAN SMALL BUSINESS
POTOMAC EDISON COMPANY, THE	IGF::OT::IGF	\$531,259.92	\$531,259.92	2015	1/14/2015	17	SS001360014	0	OTHER THAN SMALL BUSINESS
MICROSOFT CORPORATION SITZ IN REDMOND CORPORATION	IGF::OT::IGF TASK ORDER 17 AGAINST MICROSOFT CONT	\$527,180.94	\$527,180.94	2016	5/5/2016	SS000760043		23	OTHER THAN SMALL BUSINESS
SOLAR TURBINES INCORPORATED	PROVIDE FUNDING FOR OPTION YEAR #9 OF THE SOLAR								
	IGF::OT::IGF  TASK ORDER 19 AGAINST MICROSOFT CONTRACT FOR CONTINUING SUPPORT SERVICES FROM MICROSOFT FOR EXCHANGE SOFTWARE.	\$522,240.00	\$522,240.00	2015	7/8/2015	19	SS001360014	0	OTHER THAN SMALL BUSINESS
MICROSOFT CORPORATION SITZ IN REDMOND CORPORATION	NEPSC-CUSTODIAL SERVICE CONTRACT (NISH): THE PURP	\$3,774,088.44	\$511,745.36	2015	8/31/2015	SS000960002		19	OTHER THAN SMALL BUSINESS
FEDCAP REHABILITATION SERVICES INC	GENERATOR MAINTENANCE - NCC MOD TO EXERCISE OP	\$502,077.12	\$502,077.12	2015	5/29/2015	SS000760043		20	OTHER THAN SMALL BUSINESS
SOLAR TURBINES INCORPORATED	ZEC12 PHYSICAL MAINFRAME HARDWARE UPGRADES	\$489,760.00	\$489,760.00	2017	10/1/2016	SS001730002	SS001660010	0	OTHER THAN SMALL BUSINESS
INTERNATIONAL BUSINESS MACHINES CORPORATION	IGF::CL::IGF CLOSELY ASSOCIATED REQUEST EDR FUNDING FOR 2016 CONTRACT YEAR FOR FLORIDA.  ADD REMAINING RECORDS AND FUNDS.	\$464,238.47	\$464,238.47	2016	1/19/2016	5	SS001260020	1	OTHER THAN SMALL BUSINESS
HEALTH, FLORIDA DEPARTMENT OF									

Sole Source Contracts  
(December 1, 2014 - December 1, 2016)

Vendor Name	Description of Requirement	Action Obligation	Base and All Options Value	Fiscal Year	Date Signed	PO/Delivery Order/Task Order/Call#	Parent Contract	Mod #	Contracting Officers Business Size Selection
	CUSTODIAL, MECHANICAL, MAINTENANCE, AND PII AND TRASH SORTING SERVICES AT THE SOCIAL SECURITY ADMINISTRATION (SSA) SECURITY WEST BUILDING IN BALTIMORE, MD.  NOTE: DUE TO A PRE-EXISTING LEASE AGREEMENT WITH THE GENERAL SERVICES ADMINISTRATION, ONLY TCG MANAGEMENT CORPORATION (HEREAFTER REFERRED TO AS "TCG") CAN PERFORM THE REQUIRED SERVICES. IN ADDITION, AS THE SOLE OWNER OF VARIOUS HVAC EQUIPMENT AT THE DESIGNATED PLACE OF PERFORMANCE, TCG WILL NOT PERMIT OPERATION OF SUCH EQUIPMENT BY ANY OTHER ENTITY DUE TO LIABILITY ISSUES. THUS, SSA INTENDS TO ACQUIRE SUPPORT ON A SOLE SOURCE BASIS WITH TCG.								
TCG PROPERTY CORPORATION	SERVICE CONTRACT FUNCTION TYPE = IGF::CT::IGF	\$77,638.92	\$463,030.16	2016	8/31/2016	SS001660039		0	SMALL BUSINESS
MOTION PICTURE LICENSING CORPORATION	MOTION PICTURE LICENSING CORPORATION UMBRELLA	\$88,500.00	\$460,000.00	2015	1/26/2015	SS001550068		0	SMALL BUSINESS
	IGF::OT::IGF OTHER FUNCTIONS FLORIDA ELECTRONIC DEATH RECORDS MODIFICATION EXTENDS THE PERIOD OF PERFORMANCE AND ADDS NUMBER OF RECEIPT OF DEATH RECORDS. PERIOD OF PERFORMANCE EXTENDED TO DECEMBER 31, 2015.	\$456,933.87	\$456,933.87	2015	1/13/2015		4 SS001260020	1	OTHER THAN SMALL BUSINESS
HEALTH, FLORIDA DEPARTMENT OF TIS AMERICAS, INC.	INCREASE IN LICENSING ALONG WITH THE INSTALLATION	\$453,780.00	\$453,780.00	2016	9/27/2016	SS001660054		0	SMALL BUSINESS
	IGF::OT::IGF ORDER FOR NAPHSIS ELECTRONIC VERIFICATION OF VITAL EVENTS (EVVE) SYSTEM	\$444,191.88	\$444,191.88	2016	6/30/2016	SS001630514	SS001260091	0	OTHER THAN SMALL BUSINESS
NATIONAL ASSOCIATION FOR PUBLIC HEALTH STATISTICS AND INFORM IRON DATA SOLUTIONS, INC. (DE)	IGF::OT::IGF: TASK ORDER 0078 AGAINST SSA IDIQ CONT	\$433,426.00	\$433,426.00	2015	9/17/2015		78 SS001160059	0	OTHER THAN SMALL BUSINESS
	IGF::CL::IGF CLOSELY ASSOCIATED TX SS00-12-60060 ELECTRONIC DEATH REGISTRATION DELIVERY ORDER MODIFICATION TO ADD REMAINING DEATH RECORDS, ASSOCIATED FUNDS, AND EXTEND THE PERIOD OF PERFORMANCE TO DECEMBER 31, 2016.	\$432,440.15	\$432,440.15	2016	1/21/2016		5 SS001260060	1	OTHER THAN SMALL BUSINESS
STATE HEALTH SERVICES, TEXAS DEPARTMENT OF EATON CORPORATION	IGF::OT::IGF MAINTENANCE AND SERVICE FOR SOCIAL SE	\$139,766.52	\$431,878.68	2015	9/29/2015	SS001560064		0	OTHER THAN SMALL BUSINESS
	IGF::OT::IGF OTHER FUNCTIONS TEXAS ELECTRONIC DEATH RECORDS MODIFICATION EXTENDS THE PERIOD OF PERFORMANCE AND ADDS NUMBER OF RECEIPT OF DEATH RECORDS. PERIOD OF PERFORMANCE EXTENDED TO DECEMBER 31, 2015.	\$421,528.65	\$421,528.65	2015	1/14/2015		4 SS001260060	1	OTHER THAN SMALL BUSINESS
STATE HEALTH SERVICES, TEXAS DEPARTMENT OF COMMONWEALTH EDISON COMPANY (8600)	IGF::CT::IGF COMMONWEALTH EDISON (COMED) CONTR	\$400,008.00	\$400,008.00	2016	8/1/2016	SS051630017	GS00P05BSD0361	0	OTHER THAN SMALL BUSINESS
	IGF::CT::IGF COMMONWEALTH EDISON CONTRACT  REQUEST FOR SERVICE TO PROVIDE TRANSMISSION OF ELECTRICAL SERVICE TO THE HAROLD WASHINGTON SOCIAL SECURITY CENTER.	\$400,008.00	\$400,008.00	2015	7/11/2015	SS051530022	GS00P05BSD0361	0	OTHER THAN SMALL BUSINESS
	IGF::CL::IGF CLOSELY ASSOCIATED OH SS00-12-60047 ELECTRONIC DEATH REGISTRATION DELIVERY ORDER MODIFICATION TO ADD REMAINING DEATH RECORD, ASSOCIATED FUNDS AND EXTEND THE PERIOD OF PERFORMANCE TO DECEMBER 31, 2016.	\$381,562.50	\$381,562.50	2016	1/21/2016		5 SS001260047	1	OTHER THAN SMALL BUSINESS
DEPARTMENT OF HEALTH OHIO PITNEY BOWES INC.	SOLE SOURCE TO PITNEY BOWES FOR DF WORKS SERVER	\$377,299.46	\$377,299.46	2015	9/10/2015	SS001560060		0	OTHER THAN SMALL BUSINESS
TIS AMERICAS, INC.	RENEWAL OF MAINTENANCE ON TOP IMAGE SYSTEMS (T	\$375,350.00	\$375,350.00	2017	10/13/2016	SS001760004		0	SMALL BUSINESS
INNOVATION DATA PROCESSING, INC.	MAINTENANCE RENEWAL FOR INNOVATION DATA PROC	\$370,824.00	\$370,824.00	2016	3/29/2016	SS001660012		0	OTHER THAN SMALL BUSINESS



Sole Source Contracts  
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Vendor Name	Description of Requirement	Action Obligation	Base and All Options Value	Fiscal Year	Date Signed	PO/Delivery Order/Task Order/Call#	Parent Contract	Mod #	Contracting Officers Business Size Selection
DEPARTMENT OF HEALTH OHIO	IGF::OT::IGF OTHER FUNCTIONS OHIO ELECTRONIC DEATH RECORDS MODIFICATION EXTENDS THE PERIOD OF PERFORMANCE AND ADDS NUMBER OF RECEIPT OF DEATH RECORDS. PERIOD OF PERFORMANCE EXTENDED TO DECEMBER 31, 2015.	\$370,522.28	\$370,522.28	2015	1/14/2015	4	SS001260047	1	OTHER THAN SMALL BUSINESS
SKILLTRAN LLC	IGF::OT::IGF OCCUBROWSE SUBSCRIPTION RENEWAL	\$88,749.96	\$368,749.96	2015	8/25/2015	SS001550224		0	OTHER THAN SMALL BUSINESS
DLT SOLUTIONS INCORPORATED	MAINTAIN DELL DB/VIRTUALIZATION SOFTWARE	\$362,171.28	\$362,171.28	2015	5/29/2015	SS001431508	W91QUZ06A0004	1	SMALL BUSINESS
DALLAS LIGHTHOUSE FOR THE BLIND, INC.	IGF::OT::IGF MANAGE AND MAINTAIN THE MAIL ROOM AND SUPPLY ROOM AT SSA REGIONAL OFFICE IN DALLAS, TEXAS.	\$63,139.00	\$361,303.00	2015	7/21/2015	SS061560003		0	OTHER THAN SMALL BUSINESS
TIS AMERICAS, INC.	RENEWAL OF MAINTENANCE ON TOP IMAGE SYSTEMS (T	\$351,830.00	\$351,830.00	2016	10/14/2015	SS001660004		0	SMALL BUSINESS
PECO ENERGY COMPANY	DISTRIBUTION OF ELECTRICITY FOR MATSSC IGF::CT::IGF	\$350,000.00	\$350,000.00	2015	6/19/2015	SS031530007	GS00P068SD0447	0	OTHER THAN SMALL BUSINESS
PECO ENERGY COMPANY	THIS DELIVERY ORDER IS AGAINST THE PECO GSA GWAC	\$350,000.00	\$350,000.00	2016	7/11/2016	SS031630009	GS00P168SD1212	0	OTHER THAN SMALL BUSINESS
DLT SOLUTIONS INCORPORATED	MAINTAIN DELL DB/VIRTUALIZATION SOFTWARE	\$349,227.78	\$349,227.78	2016	4/22/2016	SS001431508	W91QUZ06A0004	2	SMALL BUSINESS
AHTNA ENGINEERING SERVICES	THE PURPOSE OF THIS MODIFICATION IS NECESSARY TO EXERCISE OPTION YEAR IX. AUGUST 1, 2016 TO JULY 31, 2017.								
FUTRON INC	N/A PRIOR 03/01/2012 - NOT APPLICABLE-BASE AWARD ISSUED PRIOR TO 03/01/2012	\$11,237,651.16	\$342,671.16	2016	7/25/2016	SS000760063		33	SMALL BUSINESS
	RECOVERY - THIS PROCUREMENT IS TO PROVIDE AN IT FI	\$200,768.09	\$333,383.24	2015	9/10/2015	SS001530904	GS35F5400H	0	SMALL BUSINESS
HEALTH, PENNSYLVANIA DEPARTMENT OF	IGF::CL::IGF CLOSELY ASSOCIATED DELIVERY ORDER MODIFICATION 2 ADDS REMAINING DEATH RECORDS, ASSOCIATED FUNDS AND EXTENDS THE PERIOD OF PERFORMANCE TO DECEMBER 31, 2016.	\$328,797.47	\$328,797.47	2016	1/21/2016	5	SS001260040	2	OTHER THAN SMALL BUSINESS
BOWHEAD PROFESSIONAL SOLUTIONS, LLC	IGF::OT::IGF  THIS IS A ROUTINE TASK ORDER AGAINST CONTRACT SS00-14-61008 FOR OPTION YEAR II. THIS DELIVERY ORDER IS FOR IT SUPPORT SERVICES.	\$326,771.18	\$326,771.18	2015	1/23/2015	SS001530213	SS001461008	0	SMALL BUSINESS
QOGNIFY, INC.	IGF::CT::IGF NATIONAL SUPPORT CENTER (NSC) ELECTRONIC SECURITY SYSTEM COMPONENTS SERVICE AND SUPPORT AGREEMENT FOR THE SITUATOR AND VISION SYSTEMS	\$105,000.00	\$316,990.00	2016	9/30/2016	SS001660050		0	OTHER THAN SMALL BUSINESS
OBERTHUR TECHNOLOGIES OF AMERICA CORP	IGF::CT::IGF HSPD 12 CARDSTOCK REPLACEMENT  HOMELAND SECURITY PRESIDENTIAL DIRECTIVE 12 GUIDELINES REQUIRES THE AGENCY TO USE AND MAINTAIN CARDSTOCK FOR CREDENTIAL REPLACEMENT. THE PURCHASE OF CARDSTOCK TAKES PLACE EVERY THREE YEARS AND IS USED FOR CERTIFICATE AND BIOMETRIC RENEWAL, LIFECYCLE REPLACEMENT, AND EVENT-DRIVEN REPLACEMENT.	\$315,000.00	\$315,000.00	2016	7/21/2016	SS001650188		0	OTHER THAN SMALL BUSINESS
MICROSOFT CORPORATION SITZ IN REDMOND CORPORATION	IGF::CT::IGF SIX MONTHS OF MCS SUPPORT FOR THE WIN	\$302,757.00	\$302,757.00	2016	8/16/2016	29	SS001360014	0	OTHER THAN SMALL BUSINESS
WILLIAM DATA SYSTEMS, LLC	RENEWAL OF MAINTENANCE ON GOVERNMENT OWNED	\$302,420.44	\$302,420.44	2015	12/19/2014	SS001560011		0	SMALL BUSINESS
SIGNET TECHNOLOGIES, INC.	IGF::CT::IGF - ENHANCED SERVICE PLAN FOR THE INTEGR	\$96,816.00	\$294,384.00	2015	7/13/2015	SS001550198		0	SMALL BUSINESS
PUBLIC HEALTH, ILLINOIS DEPARTMENT OF	IGF::CL::IGF CLOSELY ASSOCIATED MODIFICATION TO ADD REMAINING DEATH RECORDS AND ASSOCIATED FUNDS.	\$290,712.18	\$290,712.18	2016	1/20/2016	5	SS001260036	1	OTHER THAN SMALL BUSINESS

Sole Source Contracts  
(December 1, 2014 - December 1, 2016)

Vendor Name	Description of Requirement	Action Obligation	Base and All Options Value	Fiscal Year	Date Signed	PO/Delivery Order/Task Order/Call#	Parent Contract	Mod #	Contracting Officers Business Size Selection
PUBLIC HEALTH, ILLINOIS DEPARTMENT OF	IGF::OT::IGF OTHER FUNCTIONS ILLINOIS ELECTRONIC DEATH RECORDS MODIFICATION EXTENDS THE PERIOD OF PERFORMANCE AND ADDS NUMBER OF RECEIPT OF DEATH RECORDS. PERIOD OF PERFORMANCE EXTENDED TO DECEMBER 31, 2015.	\$283,369.62	\$283,369.62	2015	1/13/2015	4	SS001260036	1	OTHER THAN SMALL BUSINESS
IRON DATA SOLUTIONS, INC. (DE)	IGF::OT::IGF SS00-11-60059 O 0077 - MICROPACT MS OFFICE 2013 COMPLIANCE UPDATES: THE PURPOSE OF THIS ORDER IS TO HAVE MICROPACT ST. LOUIS AND TORONTO IMPLEMENT THE CHANGES FOR MICROSOFT OFFICE 2013 ON THEIR WINDOWS BASED SERVICES SOFTWARE TO ENSURE THIS APPLICATION RUNS ON THE NEW SERVER 2012 PLATFORM AND ARE COMPATIBLE FOR IMPLEMENTATION TO 47 DDS SITES.	\$275,623.00	\$275,623.00	2016	7/18/2016	77	SS001160059	0	OTHER THAN SMALL BUSINESS
BIXAL SOLUTIONS INCORPORATED	IGF::OT::IGF SBA 8(A) CONTRACT- BIXAL SOLUTIONS, INC.: WEBSITE DESIGN/DEVELOPMENT AND RELATED WEB CONTENT MANAGEMENT SYSTEM (WCMS) SERVICES. TASK ORDER 0001: OIG WEBSITE HOSTING	\$46,761.39	\$274,577.73	2016	8/23/2016	1	SS001660007	0	SMALL BUSINESS
ALVIN SMITH PHD	IGF::CL::IGF SMITH - CALL ORDER - CASES	\$273,853.00	\$273,853.00	2015	6/1/2015	14	SS061140024	0	SMALL BUSINESS
HEALTH, PENNSYLVANIA DEPARTMENT OF	ELECTRONIC DEATH REGISTRATION PENNSYLVANIA THE PURPOSE OF MODIFICATION NUMBER 5 IS TO EXERCISE OPTION YEAR IV TO EXTEND THE TERM OF THE CONTRACT FROM JANUARY 1, 2016 THROUGH DECEMBER 31, 2016 FOR RECEIPT OF ELECTRONIC DEATH RECORDS.	\$0.00	\$267,195.00	2016	12/28/2015	SS001260040		5	OTHER THAN SMALL BUSINESS
HERMAN MILLER, INC.	DURHAM, NC #R328 RELOCATION - DESIGN, INSTALLATIO	\$263,015.08	\$263,015.08	2015	7/10/2015	SS001530708	SS001260003	0	OTHER THAN SMALL BUSINESS
MICROSOFT CORPORATION SITZ IN REDMOND CORPORATION	IGF::OT::IGF  TASK ORDER 20 AGAINST MICROSOFT CONTRACT FOR CONTINUING SUPPORT SERVICES FROM MICROSOFT FOR SYSTEM CENTER CONFIGURATION MANAGER (SCCM) SOFTWARE METERING&ASSET MANAGEMENT.	\$260,896.00	\$260,896.00	2015	8/20/2015	20	SS001360014	0	OTHER THAN SMALL BUSINESS
STEPHEN KLEINMAN MD	IGF::CL::IGF - SS01-16-4C013 - KLEINMAN, STEPHEN - REC	\$256,448.00	\$256,448.00	2016	2/13/2016	1	SS01164C013	0	SMALL BUSINESS
REES M. D., MARY LANETTE	IGF::CL::IGF REES - CALL ORDER - CASES	\$254,184.00	\$254,184.00	2015	5/27/2015	12	SS061140021	0	SMALL BUSINESS
ELLEN ROZENFELD	REGION V MEDICAL CONSULTANT SERVICES FOR THE SOCIAL SECURITY ADMINISTRATION. REVIEWS BY MEDICAL CONSULTANT OF DISABILITY CLAIM CASE FILES FOR AGENCY DISABILITY PROGRAM. AWARDED DR. ELLEN ROZENFELD INDEPENDENT CASE REVIEWS. IGF::CL::IGF	\$250,453.80	\$250,453.80	2016	6/30/2016	2	SS05164C036	0	SMALL BUSINESS
GM PSYCHOLOGICAL SERVICES, INC.	REGION V MEDICAL CONSULTANT SERVICES FOR THE SOCIAL SECURITY ADMINISTRATION. REVIEWS BY MEDICAL CONSULTANT OF DISABILITY CLAIM CASE FILES FOR AGENCY DISABILITY PROGRAM. AWARDED DR. ERIKA GILYOT-MONTGOMERY INDEPENDENT CASE REVIEWS. IGF::CL::IGF	\$250,453.80	\$250,453.80	2016	6/30/2016	2	SS05164C032	0	SMALL BUSINESS
KEYPOINT GOVERNMENT SOLUTIONS, INC.	IGF::CT::IGF  BACKGROUND INVESTIGATIONS FOR ADMINISTRATIVE LAW JUDGES	\$250,000.00	\$250,000.00	2016	7/6/2016	SS001660026		0	OTHER THAN SMALL BUSINESS

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Vendor Name	Description of Requirement	Action Obligation	Base and All Options Value	Fiscal Year	Date Signed	PO/Delivery Order/Task Order/Call#	Parent Contract	Mod #	Contracting Officers Business Size Selection
KRAVITZ, LARRY	REGION V MEDICAL CONSULTANT SERVICES FOR THE SOCIAL SECURITY ADMINISTRATION. REVIEWS BY MEDICAL CONSULTANT OF DISABILITY CLAIM CASE FILES FOR AGENCY DISABILITY PROGRAM. AWARDING DR. LARRY KRAVITZ INDEPENDENT CASE REVIEWS. IGF::CL::IGF	\$246,348.00	\$246,348.00	2016	6/24/2016	2	SS05164C015	0	SMALL BUSINESS
BROWN, ROY C	IGF::CL::IGF BROWN, MC, REG. 10 ADDITION AND FUNDING OF INDEPENDENT CASE REVIEWS	\$241,808.00	\$241,808.00	2015	6/2/2015	1	SS10154C001	0	SMALL BUSINESS
WARREN, JOHN	IGF::CL::IGF SS01-16-4C017 WARREN, JOHN J CALL ORDER FOR 3000 INDEPENDENT DISABILITY CASE REVIEWS FOR PERIOD OF PERFORMANCE 04/01/2016 - 03/31/2017. THE RATE OF PAY IS \$80.14 PER CASE FOR TOTAL FUNDING OF \$240,420.	\$240,420.00	\$240,420.00	2016	2/17/2016	1	SS01164C017	0	SMALL BUSINESS
NATIONAL ASSOCIATION FOR PUBLIC HEALTH STATISTICS AND INFORM	IGF::OT::IGF TECHNICAL ASSISTANCE AND TESTING OF STATE ELECTRONIC DEATH REGISTRATION SYSTEMS (EDRS).	\$0.00	\$240,226.00	2016	10/23/2015	SS001660002		0	OTHER THAN SMALL BUSINESS
IRON DATA SOLUTIONS, INC. (DE)	IGF::OT::IGF SS00-11-60059 TO 0082 - MICROPACT IT ENGINEERING SUPPORT SERVICES FOR ONGOING IMPLEMENTATION AND MAINTENANCE OF THE CHANGE, ASSET, AND PROBLEM REPORTING SYSTEM (CAPRS) MODULE OF THE SSA ELECTRONIC DISABILITY PROCESSING SYSTEM.	\$236,704.00	\$236,704.00	2016	8/31/2016	82	SS001160059	0	OTHER THAN SMALL BUSINESS
CRA INTERNATIONAL, INC.	IGF::OT::IGF EXPERT WITNESS SERVICES TO LITIGATE A C	\$75,043.00	\$236,256.00	2015	6/4/2015	SS001560036		0	OTHER THAN SMALL BUSINESS
ADMIRAL ELEVATOR COMPANY, INC.	IGF::OT::IGF  TASK ORDER #42 SS00-15-30359  NATIONAL COMPUTER CENTER 4TH FLOOR INNER CORE REMOVE CARPET TILE AND INSTALL NEW GFM REPLACEMENT CARPET TILE WITH GFM GLUE.	\$234,804.39	\$234,804.39	2015	4/27/2015	SS001530359	SS001060042	0	SMALL BUSINESS
KAREN SCHNUTE MD PA	IGF::CL::IGF SCHNUTE - CALL ORDER - CASES	\$234,136.75	\$234,136.75	2015	5/27/2015	14	SS061140023	0	SMALL BUSINESS
BILLINGHURST, CRAIG MD	BILLINGHURST - CALL ORDER - CASES  IGF::CL::IGF	\$233,758.50	\$233,758.50	2015	6/1/2015	13	SS061140003	0	SMALL BUSINESS
EMPLOYMENT RESEARCH CORPORATION	IGF::OT::IGF OGC REQUIRES THE SERVICES OF AN EXPERT (CONTRACTOR) TO LITIGATE AN ARBITRATION BETWEEN SSA AND THE AMERICAN FEDERATION OF GOVERNMENT EMPLOYEES (AFGE OR UNION) BEFORE ARBITRATOR JONATHAN KAUFMANN.	\$75,000.00	\$225,000.00	2016	7/14/2016	SS001660030		0	SMALL BUSINESS
COMMUNITY HEALTH, MICHIGAN DEPARTMENT OF	IGF::CL::IGF CLOSELY ASSOCIATED DELIVERY ORDER MODIFICATION TO ADD REMAINING DEATH RECORDSK ASSOCIATED FUNDS AND EXTEND THE PERIOD OF PERFORMANCE.	\$218,765.15	\$218,765.15	2016	1/20/2016	5	SS001260052	1	OTHER THAN SMALL BUSINESS
COYLE, JOANNE	IGF::CL::IGF SS01-16-4C005 COYLE, JOANNE CALL ORDER FOR 2700 INDEPENDENT DISABILITY CASE REVIEWS FOR THE PERIOD OF PERFORMANCE 04/01/2016 - 03/31/2017. THE RATE OF PAY IS \$80.14 PER CASE FOR TOTAL FUNDING NEEDS OF \$216,378.	\$216,378.00	\$216,378.00	2016	2/16/2016	1	SS01164C005	0	SMALL BUSINESS

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Vendor Name	Description of Requirement	Action Obligation	Base and All Options Value	Fiscal Year	Date Signed	PO/Delivery Order/Task Order/Call#	Parent Contract	Mod #	Contracting Officers Business Size Selection
COMMUNITY HEALTH, MICHIGAN DEPARTMENT OF	IGF::OT::IGF OTHER FUNCTIONS MICHIGAN ELECTRONIC DEATH RECORDS MODIFICATION EXTENDS THE PERIOD OF PERFORMANCE AND ADDS NUMBER OF RECEIPT OF DEATH RECORDS. PERIOD OF PERFORMANCE EXTENDED TO DECEMBER 31, 2015.	\$213,243.65	\$213,243.65	2015	1/13/2015	4	SS001260052	1	OTHER THAN SMALL BUSINESS
RUSSELL PHILLIPS	IGF::CL::IGF SS01-16-4C015 PHILLIPS, RUSSELL CALL ORDER FOR 2640 INDEPENDENT DISABILITY CASE REVIEWS FOR THE PERIOD OF PERFORMANCE 04/01/2016 - 03/31/2017. THE RATE OF PAY IS \$80.14 PER CASE FOR FUNDING OF \$211,569.60.	\$211,569.60	\$211,569.60	2016	2/17/2016	1	SS01164C015	0	SMALL BUSINESS
SCHNIEWIND JR MD, HENRY	THE CONTRACTOR SHALL COMPLETE INDEPENDENT CASE	\$207,984.50	\$207,984.50	2016	3/18/2016	1	SS01164C031	0	SMALL BUSINESS
HEALTH & SENIOR SERVICES, NEW JERSEY DEPARTMENT OF	IGF::CL::IGF CLOSELY ASSOCIATED NJ MODIFICATION TO ADD REMAINING DEATH RECORDS, ASSOCIATED FUNDS AND EXTEND THE PERIOD OF PERFORMANCE TO DECEMBER 31, 2016.	\$204,274.89	\$204,274.89	2016	1/20/2016	5	SS001260031	1	OTHER THAN SMALL BUSINESS
VAN HOOSE, THOMAS A PHD	IGF::CL::IGF VAN HOOSE - CALL ORDER - CASES	\$203,498.50	\$203,498.50	2015	5/29/2015	13	SS061140025	0	SMALL BUSINESS
AHTNA ENGINEERING SERVICES	SSANRC-CLERICAL CONTRACT - INCORPORATE REVISED PRICING PER CONTRACTOR'S REQUEST FOR EQUITABLE ADJUSTMENT.  N/A PRIOR 03/01/2012 - NOT APPLICABLE-BASE AWARD ISSUED PRIOR TO 03/01/2012	\$203,475.00	\$203,475.00	2016	12/11/2015	SS000760063		30	SMALL BUSINESS
CREMERIUS, MICHAEL PHD	REGION V MEDICAL CONSULTANT SERVICES FOR THE SOCIAL SECURITY ADMINISTRATION. REVIEWS BY MEDICAL CONSULTANT OF DISABILITY CLAIM CASE FILES FOR AGENCY DISABILITY PROGRAM. AWARDING DR. MICHAEL CREMERIUS INDEPENDENT CASE REVIEWS. IGF::CL::IGF	\$201,184.20	\$201,184.20	2016	6/30/2016	2	SS05164C008	0	SMALL BUSINESS
HEALTH & SENIOR SERVICES, NEW JERSEY DEPARTMENT OF	IGF::OT::IGF OTHER FUNCTIONS NEW JERSEY ELECTRONIC DEATH RECORDS MODIFICATION EXTENDS THE PERIOD OF PERFORMANCE AND ADDS NUMBER OF RECEIPT OF DEATH RECORDS. PERIOD OF PERFORMANCE EXTENDED TO DECEMBER 31, 2015.	\$199,112.73	\$199,112.73	2015	1/14/2015	4	SS001260031	1	OTHER THAN SMALL BUSINESS
TCG PROPERTY CORPORATION	IGF::OT::IGF - CONTRACT SS00-15-60056 FOR MECHANIC	\$65,857.08	\$198,464.28	2015	8/27/2015	SS001560056		0	SMALL BUSINESS
STEVENS BERNARD	REGION 5 MEDICAL CONSULTANTS IGF::CL::IGF	\$197,078.40	\$197,078.40	2016	6/27/2016	2	SS05164C025	0	SMALL BUSINESS
DAVID BISCARDI PHD LTD	REGION V MEDICAL CONSULTANT SERVICES FOR THE SOCIAL SECURITY ADMINISTRATION. REVIEWS BY MEDICAL CONSULTANT OF DISABILITY CLAIM CASE FILES FOR AGENCY DISABILITY PROGRAM. AWARDING DR. DAVID BISCARDI INDEPENDENT CASE REVIEWS. IGF::CL::IGF	\$197,078.40	\$197,078.40	2016	6/29/2016	2	SS05164C004	0	SMALL BUSINESS
CARAHSOFT TECHNOLOGY CORPORATION	VMWARE MAINTENANCE RENEWAL FOR SS00-12-40047	\$0.00	\$196,384.00	2015	9/23/2015	8	SS001240047	0	SMALL BUSINESS
PHOENIX SOFTWARE INTERNATIONAL, INC.	PHOENIX INTERNATIONAL SOFTWARE, INC. - ADDITIONA	\$194,112.45	\$194,112.45	2015	2/24/2015	SS001060048		19	SMALL BUSINESS
JACOBSON, JAN	IGF::CL::IGF SS01-16-4C012 JACOBSON, JAN REQUISITIO	\$193,241.70	\$193,241.70	2016	2/13/2016	1	SS01164C012	0	SMALL BUSINESS
HARRIS, THERESE	IGF::CL::IGF SS01-16-4C011 HARRIS, THERESE - REQUISIT	\$192,336.00	\$192,336.00	2016	2/13/2016	1	SS01164C011	0	SMALL BUSINESS
HARRIS, THERESE	REGIONAL MEDICAL CONTRACTOR - CASE REVIEWS&NON-CASE SERVICES IGIF::CL::IGF CLOSELY ASSOCIATED	\$191,175.50	\$191,175.50	2015	3/26/2015	10	SS011140018	0	SMALL BUSINESS
GREEN, STEPHANIE	RMC - CASE REVIEWS&NON-CASE SERVICES IGF::CL::IGF CLOSELY ASSOCIATED	\$188,068.00	\$188,068.00	2015	3/26/2015	10	SS011140041	0	SMALL BUSINESS
ALLIED HEALTH CARE SERVICES	MOD 30 EXTEND FOLLOW-ON PERIOD VI UNTIL 7/31/201	\$184,323.65	\$184,323.65	2015	6/30/2015	SS000860128		30	OTHER THAN SMALL BUSINESS

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Vendor Name	Description of Requirement	Action Obligation	Base and All Options Value	Fiscal Year	Date Signed	PO/Delivery Order/Task Order/Call#	Parent Contract	Mod #	Contracting Officers Business Size Selection
BILLINGHURST, CRAIG MD	IGF::CL::IGF REGIONAL MEDICAL CONSULTANT SERVICES - REVIEWS BY MEDICAL CONSULTANT OF DISABILITY CLAIM CASE FILES FOR AGENCY DISABILITY PROGRAM.	\$183,360.00	\$183,360.00	2016	5/24/2016	2	SS06164C003	0	SMALL BUSINESS
NANCY ARMSTRONG MD	IGF::CL::IGF REGIONAL MEDICAL CONSULTANT SERVICES - REVIEWS BY MEDICAL CONSULTANT OF DISABILITY CLAIM CASE FILES FOR AGENCY DISABILITY PROGRAM.	\$183,360.00	\$183,360.00	2016	5/24/2016	3	SS06164C001	0	SMALL BUSINESS
HENSEL PHELPS SERVICES LLC	IGF::OT::IGF NATIONAL SUPPORT CENTER (NSC) OPERAT	\$182,094.00	\$182,094.00	2015	3/3/2015	SS001461106		3	OTHER THAN SMALL BUSINESS
SCHNEIDER ELECTRIC USA, INC.	IGF::CT::IGF - PURCHASE ORDER SS00-15-50276 FOR TEC	\$38,477.19	\$181,924.07	2015	9/1/2015	SS001550276		0	OTHER THAN SMALL BUSINESS
STEVEN P BOWERS	IGF::CL::IGF BOWERS - CALL ORDER - RMA	\$181,560.00	\$181,560.00	2015	5/29/2015	21	SS061140039	0	SMALL BUSINESS
HAMERSMA PHD, RICHARD	REGION V MEDICAL CONSULTANT SERVICES FOR THE SOCIAL SECURITY ADMINISTRATION. REVIEWS BY MEDICAL CONSULTANT OF DISABILITY CLAIM CASE FILES FOR AGENCY DISABILITY PROGRAM. AWARDING DR. RICHARD HAMERSMA INDEPENDENT CASE REVIEWS. IGF::CL::IGF	\$180,655.20	\$180,655.20	2016	6/30/2016	2	SS05164C012	0	SMALL BUSINESS
PERFORMANCE ASSOCIATES, INC.	NEW CONTRACT FOR PERFORMANCE ASSOCIATES PAI/O	\$58,267.00	\$180,101.00	2016	10/2/2015	SS001660001		0	SMALL BUSINESS
AVANTGARDE TRANSLATIONS, INC.	IGF::CT::IGF CRITICAL FUNCTION  PERIOD OF PERFORMANCE: 09/30/2015 - 9/29/2016  CONTRACTOR TO PROVIDE TRANSLATION OF ENGLISH LANGUAGE DOCUMENTS INTO ANY 21 FOREIGN TRANSLATION AND UPDATES OF PREVIOUSLY TRANSLATED WORK IN ACCORDANCE WITH THE PRICES ESTABLISHED BY THE CONTRACT IN SECTION A AND THE TERMS OF SECTION B OF THE CONTRACT. ACTUAL PUBLICATIONS TO BE TRANSLATED WILL BE SENT WITH A WORK ORDER AS DESCRIBED IN CONTRACT SECTION C-4.4 ORDERING OFFICIAL. THIS TASK ORDER FULFILLS THE GUARANTEED MINIMUM FOR OPTION YEAR 3 OF THE CONTRACT.	\$180,000.00	\$180,000.00	2015	7/14/2015	SS001530679	SS001260096	0	SMALL BUSINESS
AMERICAN MEDICAL ASSOCIATION	IGF::CT::IGF AMERICAN MEDICAL ASSOCIATION - DIRECTORY OF PHYSICIANS PROFILE SUBSCRIPTION RENEWAL	\$180,000.00	\$180,000.00	2016	6/9/2016	SS001650136		0	OTHER THAN SMALL BUSINESS
AMERICAN MEDICAL ASSOCIATION	IGF::CT::IGF AMERICAN MEDICAL ASSOCIATION SUBSCRIPTION RENEWAL	\$180,000.00	\$180,000.00	2015	6/17/2015	SS001550171		0	OTHER THAN SMALL BUSINESS
AVANTGARDE TRANSLATIONS, INC.	IGF::OT::IGF OTHER FUNCTION TRANSLATION SERVICES TO CONVERT SSA'S PUBLICATIONS INTO OVER 21 DIFFERENT LANGUAGES. THESE FUNDS WILL BE APPLIED TO OPTION YEAR 4 OF CONTRACT SS00-12-60096 WITH ADVANTGARDE TRANSLATIONS.	\$180,000.00	\$180,000.00	2016	8/4/2016	SS001630633	SS001260096	0	SMALL BUSINESS
JAMES L GRECO MD	REGION V MEDICAL CONSULTANT SERVICES FOR THE SOCIAL SECURITY ADMINISTRATION. REVIEWS BY MEDICAL CONSULTANT OF DISABILITY CLAIM CASE FILES FOR AGENCY DISABILITY PROGRAM. AWARDING DR. JAMES GRECO FOR RMC CASE REVIEWS. IGF::CL::IGF	\$179,060.00	\$179,060.00	2016	6/30/2016	3	SS05164C028	0	SMALL BUSINESS

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Vendor Name	Description of Requirement	Action Obligation	Base and All Options Value	Fiscal Year	Date Signed	PO/Delivery Order/Task Order/Call#	Parent Contract	Mod #	Contracting Officers Business Size Selection
IRON DATA SOLUTIONS, INC. (DE)	IGF::OT::IGF OTHER FUNCTION TASK ORDER TO PROVIDE THE 47 DDS SITES CURRENTLY USING THE MICROPACT SOFTWARE WITH ACCESS TO CONTRACTORS PERSONNEL DURING THE ADDITIONAL HOURS OF 6:00 A.M. TO 8:00 A.M. EST AND 5:00 P.M. TO 10:00 P.M. EST.	\$44,950.00	\$178,360.00	2017	10/1/2016	83	SS001160059	0	OTHER THAN SMALL BUSINESS
HEALTH, INDIANA DEPARTMENT OF DALTON, CHARLES B	IGF::CL::IGF CLOSELY ASSOCIATED IN SS00-12-60035 ELECTRONIC DEATH REGISTRATION DELIVERY ORDER MODIFICATION TO ADD REMAINING DEATH RECORDS, ASSOCIATED FUNDS AND EXTEND THE PERIOD OF PERFORMANCE TO DECEMBER 31, 2016.	\$178,064.62	\$178,064.62	2016	1/21/2016	5	SS001260035	1	OTHER THAN SMALL BUSINESS
	IGF::CL::IGF MODIFICATION TO ADD CASES, ADD NON-CASES	\$176,400.00	\$176,400.00	2016	7/20/2016	1	SS09164C013	1	SMALL BUSINESS
IRON DATA SOLUTIONS, INC. (DE)	IGF::OT::IGF IDIQ CONTRACT SS00-11-60059(IRON DATA SOLUTIONS, INC.)--TASK ORDER 0079: EXTENDED SERVICE COVERAGE (ESC)TO 47 DDS SITES CURRENTLY USING THE IRON DATA SOFTWARE.	\$174,720.00	\$174,720.00	2016	10/2/2015	79	SS001160059	0	OTHER THAN SMALL BUSINESS
HAWKINS, PAMELA GREEN PHD	IGF::CL::IGF MODIFICATION TO ADD CASES AND EXTEND	\$174,389.40	\$174,389.40	2016	7/29/2016	1	SS09164C037	1	SMALL BUSINESS
LOOK SOFTWARE PTY. LTD.	MAINTAIN LOOK NEWLOOK AND SMARTCLIENT SOFTWARE	\$174,294.00	\$174,294.00	2015	5/1/2015	SS001560033		0	OTHER THAN SMALL BUSINESS
LOOK SOFTWARE PTY. LTD.	RENEWAL OF SS00-15-60033 FOR MAINTENANCE ON LOOK SOFTWARE	\$174,294.00	\$174,294.00	2016	6/1/2016	SS001660018		0	OTHER THAN SMALL BUSINESS
DEES, MD, TOM M	DEES - CALL ORDER - RMC IGF::CL::IGF	\$173,995.00	\$173,995.00	2015	5/13/2015	13	SS061140009	0	SMALL BUSINESS
HEALTH, INDIANA DEPARTMENT OF PRESTON DAVIS, PSY.D. CLINICAL & FORENSIC PSYCHOLOGIST, INC.	IGF::OT::IGF OTHER FUNCTIONS INDIANA ELECTRONIC DEATH RECORDS MODIFICATION EXTENDS THE PERIOD OF PERFORMANCE AND ADDS NUMBER OF RECEIPT OF DEATH RECORDS. PERIOD OF PERFORMANCE EXTENDED TO DECEMBER 31, 2015.	\$173,571.35	\$173,571.35	2015	1/13/2015	4	SS001260035	1	OTHER THAN SMALL BUSINESS
	IGF::CL::IGF MODIFICATION TO ADD CASES AND EXTEND	\$173,055.00	\$173,055.00	2016	7/26/2016	1	SS09164C015	1	SMALL BUSINESS
LIPSKI, MARCIA BRODE, TAWNIA E	PERIOD OF PERFORMANCE 04/01/2016 TO 03/31/2017. THE CONTRACTOR SHALL COMPLETE INDEPENDENT CASE REVIEWS IN ACCORDANCE WITH THE TERMS AND CONDITIONS SET FORTH IN THE RMC BPA. IGF::CL::IGF	\$173,021.00	\$173,021.00	2016	3/21/2016	1	SS01164C032	0	SMALL BUSINESS
	IGF::CL::IGF MODIFICATION TO ADD CASES AND EXTEND	\$171,810.00	\$171,810.00	2016	7/26/2016	1	SS09164C032	1	SMALL BUSINESS
MARY MCLARNON MD	IGF::CL::IGF REGION 2 MEDICAL CONSULTANTS. REVIEWS BY MEDICAL CONSULTANT OF DISABILITY CLAIM CASE FILES FOR AGENCY DISABILITY PROGRAM.	\$171,402.00	\$171,402.00	2015	5/7/2015	11	SS021140095	0	SMALL BUSINESS
PRESTON DAVIS, PSY.D. CLINICAL & FORENSIC PSYCHOLOGIST, INC.	IGF::CL::IGF REGION 9 MEDICAL CONSULTANTS. REVIEWS BY MEDICAL CONSULTANT OF DISABILITY CLAIM CASE FILES FOR AGENCY DISABILITY PROGRAM. CALL ORDER TO AWARD PRESTON DAVIS 2050 CASES AND 4 NON-CASE HOURS.	\$171,356.52	\$171,356.52	2016	2/26/2016	1	SS09164C015	0	SMALL BUSINESS
BRODE, TAWNIA E	IGF::CL::IGF REGION 9 MEDICAL CONSULTANTS. REVIEWS BY MEDICAL CONSULTANT OF DISABILITY CLAIM CASE FILES FOR AGENCY DISABILITY PROGRAM. CALL ORDER TO AWARD TAWNIA BRODE 2050 CASES AND 4 NON-CASE HOURS.	\$170,518.00	\$170,518.00	2016	2/29/2016	1	SS09164C032	0	SMALL BUSINESS

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Vendor Name	Description of Requirement	Action Obligation	Base and All Options Value	Fiscal Year	Date Signed	PO/Delivery Order/Task Order/Call#	Parent Contract	Mod #	Contracting Officers Business Size Selection
CHOPRA, MD, ARVIND HERMAN MILLER, INC.	IGF::CL::IGF REGION 2 MEDICAL CONSULTANTS. REVIEWS BY MEDICAL CONSULTANT OF DISABILITY CLAIM CASE FILES FOR AGENCY DISABILITY PROGRAM. MODIFICATION TO EXTEND THE PERIOD OF PERFORMANCE AND INCREASE QUANTITY.	\$168,882.00	\$168,882.00	2015	5/27/2015	9	SS021040027	2	SMALL BUSINESS
	CHARLESTON, SC XY18 DESIGN, ODAR SECONDARY ACTI	\$168,465.20	\$168,465.20	2016	4/12/2016	SS001630293	SS001260003	0	OTHER THAN SMALL BUSINESS
FUTURENET SECURITY SOLUTIONS, LLC TERRY, KIMBERLEE R	PERIMETER SECURITY SYSTEM MAINTENANCE AND REPAIR FOR THE SECOND SUPPORT CENTER IN DURHAM, NC.  FPDS FUNCTION: IGF::OT::IGF	\$27,912.00	\$167,460.00	2016	9/30/2016	SS001660053		0	OTHER THAN SMALL BUSINESS
	IGF::CL::IGF CLOSELY ASSOCIATED - REGIONAL MEDICA	\$167,200.00	\$167,200.00	2016	5/10/2016	2	SS08164C025	0	SMALL BUSINESS
GEORGIA, DEPARTMENT OF PUBLIC HEALTH	IGF::OT::IGF OTHER FUNCTIONS GEORGIA ELECTRONIC DEATH RECORDS MODIFICATION EXTENDS THE PERIOD OF PERFORMANCE AND ADDS NUMBER OF RECEIPT OF DEATH RECORDS. PERIOD OF PERFORMANCE EXTENDED TO DECEMBER 31, 2015.	\$167,066.15	\$167,066.15	2015	1/13/2015	4	SS001260021	1	OTHER THAN SMALL BUSINESS
STERLING E MOORE	IGF::CL::IGF MOORE, S. - CALL ORDER - CASES	\$166,430.00	\$166,430.00	2015	5/27/2015	11	SS061140018	0	SMALL BUSINESS
CARUSO-RADIN, PHAEDRA HERMAN MILLER, INC.	MEDICAL CONSULTANT SERVICES DR. PHAEDRA IGF::CL::IGF CLOSELY ASSOCIATED	\$166,385.44	\$166,385.44	2016	2/24/2016	1	SS09164C020	0	SMALL BUSINESS
	SAN LUIS OBISPO, CA C986 - DESIGN,INSTALLATION AND	\$165,996.54	\$165,996.54	2015	5/29/2015	SS001530547	SS001260003	0	OTHER THAN SMALL BUSINESS
BOWHEAD PROFESSIONAL SOLUTIONS, LLC	IGF::OT::IGF  THE SOCIAL SECURITY ADMINISTRATION (SSA) HAS A REQUIREMENT FOR CONTRACTOR SERVICES TO SUPPORT OUR AUTOMATED DATA PROCESSING CAPABILITIES AT CLAIMS-TAKING FOREIGN SERVICE POSTS (FSP) SITES.  JUSTIFICATION: THESE SERVICES ARE REQUIRED TO PROVIDE SUPPORT FOR RELOCATIONS (CURRENT BUILDING LOCATION TO ANOTHER BUILDING LOCATION), INSTALLATIONS AND UPGRADES OF INTELLIGENT WORKSTATIONS (IWS) AND LOCAL AREA NETWORK (LAN) COMPONENTS IN VARIOUS FSP SITES. THE SERVICES PROVIDES FOR THE COMPLETE INSTALLATION OF NEW FSP SITES AND TECHNOLOGY REFRESHMENTS AT EXISTING SITES. THE PROJECT WILL BE MULTI-PHASED IN NATURE AND WILL REQUIRE SITE VISITS, INSTALLATION, TRAINING, SHIPPING, AND PROJECT MANAGEMENT.	\$165,936.76	\$165,936.76	2015	12/19/2014	SS001530142	SS001461008	1	SMALL BUSINESS
MILA C. R. BACALLA MD	CHICAGO REGION MEDICAL CONSULTANT IGF::CT::IGF	\$164,232.00	\$164,232.00	2016	6/27/2016	2	SS05164C001	0	SMALL BUSINESS
MARY JONES	REGION V MEDICAL CONSULTANT SERVICES FOR THE SOCIAL SECURITY ADMINISTRATION. REVIEWS BY MEDICAL CONSULTANT OF DISABILITY CLAIM CASE FILES FOR AGENCY DISABILITY PROGRAM. AWARDING MARY JONES SLP INDEPENDENT CASE REVIEWS. IGF::CL::IGF	\$164,232.00	\$164,232.00	2016	6/10/2016	2	SS05164C033	0	SMALL BUSINESS

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Vendor Name	Description of Requirement	Action Obligation	Base and All Options Value	Fiscal Year	Date Signed	PO/Delivery Order/Task Order/Call#	Parent Contract	Mod #	Contracting Officers Business Size Selection
GURCHARAN SINGH MD	IGF::CL::IGF RMC TO CONDUCT INDEPENDENT CASE REVIEWS. REVIEWS BY MEDICAL CONSULTANT OF DISABILITY CLAIM CASE FILES FOR AGENCY DISABILITY PROGRESS.	\$164,000.00	\$164,000.00	2016	7/13/2016	3	SS03154C013	0	SMALL BUSINESS
MOHNEY, CAROL	IGF::CL::IGF MOHNEY - CALL ORDER - REVIEWS	\$163,404.00	\$163,404.00	2015	6/22/2015	12	SS061140016	1	SMALL BUSINESS
SINGH NAVJEET DR	IGF::CL::IGF RMC TO CONDUCT INDEPENDENT CASE REVIEWS. REVIEWS BY MEDICAL CONSULTANT OF DISABILITY CLAIM CASE FILES FOR AGENCY DISABILITY PROGRESS.	\$163,100.00	\$163,100.00	2016	7/12/2016	3	SS03154C014	0	SMALL BUSINESS
HEALTH AND SENIOR SERVICES, MISSOURI DEPARTMENT OF	IGF::CL::IGF CLOSELY ASSOCIATED CALL ORDER MODIFICATION TO ADD REMAINING DEATH RECORDS, ASSOCIATED FUNDS, AND EXTEND THE PERIOD OF PERFORMANCE TO 12/31/2016.	\$162,297.86	\$162,297.86	2016	1/20/2016	5	SS001260026	1	OTHER THAN SMALL BUSINESS
EASTMAN KODAK COMPANY	PURCHASE NEW CONTROLLERS FOR KODAK VL2000 CAR	\$162,000.00	\$162,000.00	2015	8/10/2015	SS001550233		0	OTHER THAN SMALL BUSINESS
STACY KOUTRAKOS, PSY.D.	IGF::CL::IGF CLOSELY ASSOCIATED - CALL ORDER FOR I	\$160,600.00	\$160,600.00	2016	7/12/2016	4	SS08164C012	0	SMALL BUSINESS
OUTTZ, JAMES & ASSOCIATES	IGF::OT::IGF OFFICE OF GENERAL COUNSEL, EXPERT WITNESS CONSULTING SERVICES FOR LITGATION OF A CLASS ACTION PENDING BEFORE EEOC	\$74,800.00	\$159,800.00	2015	5/26/2015	SS001560037		0	SMALL BUSINESS
HEALTH AND SENIOR SERVICES, MISSOURI DEPARTMENT OF	IGF::OT::IGF OTHER FUNCTIONS MISSOURI ELECTRONIC DEATH RECORDS MODIFICATION EXTENDS THE PERIOD OF PERFORMANCE AND ADDS NUMBER OF RECEIPT OF DEATH RECORDS. PERIOD OF PERFORMANCE EXTENDED TO DECEMBER 31, 2015.	\$158,199.22	\$158,199.22	2015	1/14/2015	4	SS001260026	1	OTHER THAN SMALL BUSINESS
MAURICE PROUT	IGF::CL::IGF RMC TO CONDUCT INDEPENDENT CASE REVIEWS. REVIEWS BY MEDICAL CONSULTANT OF DISABILITY CLAIM CASE FILES FOR AGENCY DISABILITY PROGRESS.	\$156,980.00	\$156,980.00	2016	7/15/2016	5	SS03154C021	0	SMALL BUSINESS
MICROSOFT CORPORATION SITZ IN REDMOND CORPORATION	IGF::CT::IGF TASK ORDER FOR MICROSOFT SOLUTION FO	\$156,702.00	\$156,702.00	2016	8/4/2016	28	SS001360014	0	OTHER THAN SMALL BUSINESS
JOSEPH COOLS	REGION V MEDICAL CONSULTANT SERVICES FOR THE SOCIAL SECURITY ADMINISTRATION. REVIEWS BY MEDICAL CONSULTANT OF DISABILITY CLAIM CASE FILES FOR AGENCY DISABILITY PROGRAM. AWARDING DR. JOSEPH COOLS INDEPENDENT CASE REVIEWS. IGF::CL::IGF	\$156,476.60	\$156,476.60	2016	6/24/2016	2	SS05164C007	0	SMALL BUSINESS
SCHWARTZ, MILFORD	REGION V MEDICAL CONSULTANT SERVICES FOR THE SOCIAL SECURITY ADMINISTRATION. REVIEWS BY MEDICAL CONSULTANT OF DISABILITY CLAIM CASE FILES FOR AGENCY DISABILITY PROGRAM. AWARDING DR MILFORD SCHWARTZ M.D. INDEPENDENT CASE REVIEWS. IGF::CL::IGF	\$156,020.40	\$156,020.40	2016	6/10/2016	2	SS05164C023	0	SMALL BUSINESS
CHANG, DOUGLAS	REGION V MEDICAL CONSULTANT SERVICES FOR THE SOCIAL SECURITY ADMINISTRATION. REVIEWS BY MEDICAL CONSULTANT OF DISABILITY CLAIM CASE FILES FOR AGENCY DISABILITY PROGRAM. AWARDING DR. DOUGLAS CHANG INDEPENDENT CASE REVIEWS. IGF::CL::IGF	\$156,020.40	\$156,020.40	2016	6/30/2016	2	SS05164C006	0	SMALL BUSINESS



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Vendor Name	Description of Requirement	Action Obligation	Base and All Options Value	Fiscal Year	Date Signed	PO/Delivery Order/Task Order/Call#	Parent Contract	Mod #	Contracting Officers Business Size Selection
PUBLIC HEALTH, MASSACHUSETTS DEPT OF	IGF::CL::IGF CLOSELY ASSOCIATED DELIVERY ORDER MODIFICATION TO ADD REMAINING DEATH RECORDS, ASSOCIATED FUNDS, AND EXTEND THE PERIOD TO DEC 31, 2016.	\$155,179.59	\$155,179.59	2016	1/20/2016	5	SS001260053	1	OTHER THAN SMALL BUSINESS
HEALTH, WASHINGTON STATE DEPARTMENT OF CARUSO-RADIN, PHAEDRA	IGF::CL::IGF CLOSELY ASSOCIATED WA SS00-12-60023 ELECTRONIC DEATH REGISTRATION DELIVERY ORDER MODIFICATION TO ADD REMAINING DEATH RECORDS, ASSOCIATED FUNDS, AND EXTEND THE PERIOD OF PERFORMANCE TO DECEMBER 31, 2016.	\$155,176.42	\$155,176.42	2016	1/21/2016	5	SS001260023	1	OTHER THAN SMALL BUSINESS
	IGF::CL::IGF MODIFICATION TO ADD CASES AND EXTEND	\$154,380.00	\$154,380.00	2016	7/29/2016	1	SS09164C020	1	SMALL BUSINESS
DALTON, CHARLES B	IGF::CL::IGF  REGION 9 MEDICAL CONSULTANTS. REVIEWS BY MEDICAL CONSULTANT OF DISABILITY CLAIM CASE FILES FOR AGENCY DISABILITY PROGRAM. CALL ORDER TO AWARD CHARLES DALTON 1300 MC CASES, 400 RMA CASES, AND 150 NON-CASE HOURS.	\$152,900.00	\$152,900.00	2016	2/24/2016	1	SS09164C013	0	SMALL BUSINESS
HEALTH SERVICES, WISCONSIN DEPARTMENT OF	IGF::CL::IGF CLOSELY ASSOCIATED DELIVERY ORDER MODIFICATION TO ADD REMAINING DEATH RECORDS, ASSOCIATED FUNDS AND EXTEND THE PERIOD OF PERFORMANCE TO DECEMBER 31, 2016.	\$152,625.00	\$152,625.00	2016	1/21/2016	5	SS001260059	1	OTHER THAN SMALL BUSINESS
PUBLIC HEALTH SOLUTIONS	IGF::CL::IGF CLOSELY ASSOCIATED NYC SS00-12-60033 ELECTRONIC DEATH REGISTRATION DELIVERY ORDER MODIFICATION TO ADD REMAINING RECORDS, ASSOCIATED FUNDS, AND EXTEND THE PERIOD OF PERFORMANCE TO 12/31/2016.	\$152,625.00	\$152,625.00	2016	1/21/2016	5	SS001260033	1	OTHER THAN SMALL BUSINESS
DIVISION OF VITAL RECORDS	IGF::CL::IGF CLOSELY ASSOCIATED VA SS00-12-60044 ELECTRONIC DEATH REGISTRATION DELIVERY ORDER MODIFICATION TO ADD REMAINING DEATH RECORDS, ASSOCIATED FUNDS AND EXTEND THE PERIOD OF PERFORMANCE TO DECEMBER 31, 2016.	\$152,625.00	\$152,625.00	2016	1/21/2016	5	SS001260044	1	OTHER THAN SMALL BUSINESS
RENNER, LISA	IGF::CL::IGF CLOSELY ASSOCIATED - CALL ORDER FOR IT	\$152,000.00	\$152,000.00	2016	6/29/2016	3	SS08164C019	0	SMALL BUSINESS
THE ARC OF BALTIMORE INCORPORATED (1428)	RIVER JACK STONE PROJECT	\$151,654.00	\$151,654.00	2016	5/10/2016	SS000860012		49	OTHER THAN SMALL BUSINESS
HEALTH, WASHINGTON STATE DEPARTMENT OF HELP/SYSTEMS, LLC	IGF::OT::IGF OTHER FUNCTIONS WASHINGTON ELECTRONIC DEATH RECORDS MODIFICATION EXTENDS THE PERIOD OF PERFORMANCE AND ADDS NUMBER OF RECEIPT OF DEATH RECORDS. PERIOD OF PERFORMANCE EXTENDED TO DECEMBER 31, 2015.	\$151,255.87	\$151,255.87	2015	1/14/2015	4	SS001260023	1	OTHER THAN SMALL BUSINESS
	RENEWAL OF SS00-16-50015 AND SS00-16-5009L FOR M	\$150,757.00	\$150,757.00	2017	11/1/2016	SS001750022		0	OTHER THAN SMALL BUSINESS
KLEIN, PAUL Y	IGF::CL::IGF  BLANKET PURCHASE AGREEMENTS FOR CONTRACTORS TO PROVIDE REGIONAL MEDICAL CONSULTANT SERVICES FOR THE SOCIAL SECURITY ADMINISTRATION. REVIEWS BY MEDICAL CONSULTANT OF DISABILITY CLAIM CASE FILES FOR AGENCY DISABILITY PROGRAM.	\$150,453.60	\$150,453.60	2016	7/29/2016	1	SS09164C039	1	SMALL BUSINESS
MENDOZA, RYAN	IGF::CL::IGF  REGIONAL MEDICAL CONSULTANT SERVICES - REVIEWS BY MEDICAL CONSULTANT OF DISABILITY CLAIM CASE FILES FOR AGENCY DISABILITY PROGRAM.	\$150,000.00	\$150,000.00	2016	7/20/2016	5	SS03154C026	0	SMALL BUSINESS
GAIR, CELINE PAYNE PHD	IGF::CL::IGF MEDICAL CONSULTANT SERVICES TO REVIEW	\$149,953.20	\$149,953.20	2016	3/9/2016	1	SS04164C006	0	SMALL BUSINESS

Sole Source Contracts  
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Vendor Name	Description of Requirement	Action Obligation	Base and All Options Value	Fiscal Year	Date Signed	PO/Delivery Order/Task Order/Call#	Parent Contract	Mod #	Contracting Officers Business Size Selection
BLASE, MD MARVIN	IGF::CL::IGF MEDICAL CONTRACTOR SERVICES - MENTAL CASES CLOSELY ASSOCIATED TO INHERENTLY GOVERNMENTAL FUNCTION	\$149,953.20	\$149,953.20	2016	3/15/2016	2	SS04164C100	0	SMALL BUSINESS
RUBINOWITZ, MARTIN DR PC	IGF::CL::IGF CLOSELY ASSOCIATED - REGIONAL MEDICAL	\$149,948.00	\$149,948.00	2016	6/3/2016	2	SS08164C020	0	SMALL BUSINESS
AMUSA, KWELI J MD, A PROFESSIONAL CORPORATION	ME EXPRESS REPORTING - MENTAL HEALTH IGF::CT::IGF	\$149,910.00	\$149,910.00	2015	9/30/2015	2015	SS10781160046	0	SMALL BUSINESS
HEALTH SERVICES, ARIZONA DEPT OF REHABILITATION TEAM ASSOCIATES INC	IGF::CL::IGF CLOSELY ASSOCIATED AZ-SS00-12-60014 ELECTRONIC DEATH REGISTRATION DELIVERY ORDER. 40500 EDR RECORDS AT \$3.17 PER RECORD AND 13500 EDR RECORDS AT \$1.59 PER RECORD. TOTAL DELIVERY ORDER \$149,850. PERIOD OF PERFORMANCE 1/01/2016 - 12/31/2016.	\$149,850.00	\$149,850.00	2016	12/22/2015	5	SS001260014	0	OTHER THAN SMALL BUSINESS
	ME EXPRESS REPORTING - MENTAL HEALTH IGF::CT::IGF	\$149,802.90	\$149,802.90	2015	9/30/2015	2015	SS10631150171	0	SMALL BUSINESS
DISABILITY CONSULTANTS, LLC	MEDICAL CONTRACTOR SERVICES - MENTAL CASES CLOSELY ASSOCIATED TO INHERENTLY GOVERNMENTAL FUNCTION IGF::CL::IGF	\$149,668.25	\$149,668.25	2015	3/30/2015	35	SS041140025	0	SMALL BUSINESS
H. RUDOLPH WARREN, M.D., P.C.	MEDICAL CONTRACTOR SERVICES - MENTAL CASES CLOSELY ASSOCIATED TO INHERENTLY GOVERNMENTAL FUNCTION IGF::CL::IGF	\$149,668.25	\$149,668.25	2015	6/10/2015	13	SS041140062	0	SMALL BUSINESS
VANDERPLATE, CALVIN	MEDICAL CONTRACTOR SERVICES - MENTAL CASES CLOSELY ASSOCIATED TO INHERENTLY GOVERNMENTAL FUNCTION IGF::CL::IGF	\$149,668.25	\$149,668.25	2015	6/23/2015	15	SS041140065	0	SMALL BUSINESS
DISABILITY CONSULTANTS, LLC	MEDICAL CONTRACTOR SERVICES - PHYSICAL CASES CLOSELY ASSOCIATED TO INHERENTLY GOVERNMENTAL FUNCTION IGF::CL::IGF	\$149,668.25	\$149,668.25	2015	6/1/2015	37	SS041140025	0	SMALL BUSINESS
MICROSOFT CORPORATION SITZ IN REDMOND CORPORATION	IGF::OT::IGF TASK ORDER 18 TO CONTRACT SS00-13-600	\$149,384.00	\$149,384.00	2015	2/9/2015	18	SS001360014	0	OTHER THAN SMALL BUSINESS
JAMES M RYAN	VE EXPRESS REPORTING IGF::CT::IGF	\$149,369.81	\$149,369.81	2015	9/30/2015	2015	SS10381130127	0	SMALL BUSINESS
JONES, GREGORY STUART	VE EXPRESS REPORTING IGF::CT::IGF	\$149,325.00	\$149,325.00	2015	9/30/2015	2015	SS10881190033	0	SMALL BUSINESS
REHABILITATION TEAM ASSOCIATES INC	ME EXPRESS REPORTING - MENTAL HEALTH IGF::CT::IGF	\$149,302.00	\$149,302.00	2015	9/30/2015	20151	SS10631150171	0	SMALL BUSINESS
KYNEXIA, LLC	VE EXPRESS REPORTING IGF::CT::IGF	\$149,024.15	\$149,024.15	2015	9/30/2015	2015	SS10541140411	0	SMALL BUSINESS
INDIANAPOLIS BONE & JOINT CLINIC INC	ME EXPRESS REPORTING - MENTAL HEALTH IGF::CT::IGF	\$148,840.00	\$148,840.00	2015	9/30/2015	2015	SS10631150232	0	SMALL BUSINESS
AUTOMATED ENVIRONMENTS, INC.	VE EXPRESS REPORTING IGF::CT::IGF	\$148,785.28	\$148,785.28	2015	9/30/2015	2015	SS10541140151	0	SMALL BUSINESS
PUBLIC HEALTH SOLUTIONS	IGF::OT::IGF OTHER FUNCTIONS NYC ELECTRONIC DEATH RECORDS MODIFICATION EXTENDS THE PERIOD OF PERFORMANCE AND ADDS NUMBER OF RECEIPT OF DEATH RECORDS. PERIOD OF PERFORMANCE EXTENDED TO DECEMBER 31, 2015.	\$148,775.00	\$148,775.00	2015	1/14/2015	4	SS001260033	1	OTHER THAN SMALL BUSINESS
DIVISION OF VITAL RECORDS	IGF::OT::IGF OTHER FUNCTIONS VIRGINIA ELECTRONIC DEATH RECORDS MODIFICATION EXTENDS THE PERIOD OF PERFORMANCE AND ADDS NUMBER OF RECEIPT OF DEATH RECORDS. PERIOD OF PERFORMANCE EXTENDED TO DECEMBER 31, 2015.	\$148,775.00	\$148,775.00	2015	1/14/2015	4	SS001260044	1	OTHER THAN SMALL BUSINESS
HEALTH SERVICES, WISCONSIN DEPARTMENT OF	IGF::OT::IGF OTHER FUNCTIONS WISCONSIN ELECTRONIC DEATH RECORDS MODIFICATION EXTENDS THE PERIOD OF PERFORMANCE AND ADDS NUMBER OF RECEIPT OF DEATH RECORDS. PERIOD OF PERFORMANCE EXTENDED TO DECEMBER 31, 2015.	\$148,775.00	\$148,775.00	2015	1/14/2015	4	SS001260059	1	OTHER THAN SMALL BUSINESS

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Vendor Name	Description of Requirement	Action Obligation	Base and All Options Value	Fiscal Year	Date Signed	PO/Delivery Order/Task Order/Call#	Parent Contract	Mod #	Contracting Officers Business Size Selection
MEADOWDALE MEDICAL CONSULTING, PLLC	IGF::CL::IGF CLOSELY ASSOCIATED REGION 10, MC, MEADOWDALE MEDICAL CONSULTING	\$148,770.00	\$148,770.00	2016	4/20/2016	5	SS10154C000	0	SMALL BUSINESS
ARTHUR L LEWY	IGF::CL::IGF CLOSELY ASSOCIATED LEWY, MC, REGION 10 ADD FUNDING AND CASES	\$148,122.00	\$148,122.00	2016	2/19/2016	2	SS10154C007	0	SMALL BUSINESS
RINEHART ASSESSMENT SERVICES	VE EXPRESS REPORTING IGF::CT::IGF	\$147,860.00	\$147,860.00	2015	9/30/2015	2015	SS10881190103	0	SMALL BUSINESS
SNYDER, DARRELL M	REGION V MEDICAL CONSULTANT SERVICES FOR THE SOCIAL SECURITY ADMINISTRATION. REVIEWS BY MEDICAL CONSULTANT OF DISABILITY CLAIM CASE FILES FOR AGENCY DISABILITY PROGRAM. THIS IS TO FUND A NEW CALL ORDER FOR INDEPENDENT CASE REVIEWS AGAINST SS05-16-4C024, CALL ORDER 2, DR DARRELL SNYDER IGF::CL::IGF	\$147,808.80	\$147,808.80	2016	6/30/2016	2	SS05164C024	0	SMALL BUSINESS
GEORGIA, DEPARTMENT OF PUBLIC HEALTH AUTOMATED ENVIRONMENTS, INC.	IGF::CL::IGF CLOSELY ASSOCIATED GA SS00-12-60021 ELECTRONIC DEATH REGISTRATION DELIVERY ORDER. 55,0500 EDR RECORDS TOTAL DELIVERY ORDER \$147,648.50. PERIOD OF PERFORMANCE 1/01/2016 - 12/31/2016.	\$147,648.50	\$147,648.50	2016	12/22/2015	5	SS001260021	0	OTHER THAN SMALL BUSINESS
HATAKEYAMA, RONALD	VE EXPRESS REPORTING IGF::CT::IGF	\$147,543.00	\$147,543.00	2015	9/30/2015	20151	SS10541140151	0	SMALL BUSINESS
HERMAN MILLER, INC.	VE EXPRESS REPORTING IGF::CT::IGF	\$147,150.00	\$147,150.00	2015	9/30/2015	2015	SS10881190019	0	SMALL BUSINESS
PHILADELPHIA, CITY OF- WATER DEPARTMENT	LENEXA, KS I779 PHASED RECONFIGURATION FOR SYSTEM	\$146,520.78	\$146,520.78	2015	7/8/2015	SS001530687	SS001260003	0	OTHER THAN SMALL BUSINESS
PHILADELPHIA, CITY OF- WATER DEPARTMENT	POTABLE WATER AND WATER FOR FIRE SUPPRESSION FOR MATSSC, PERIOD OF PERFORMANCE 08/01/2015 TO 07/31/2016	\$146,294.00	\$146,294.00	2015	6/16/2015	SS031550012		0	OTHER THAN SMALL BUSINESS
HERMAN MILLER, INC.	REGION 3 UTILITIES - THIS AWARD IS FOR PROCUREMENT	\$146,293.56	\$146,293.56	2016	6/7/2016	SS031650005		0	OTHER THAN SMALL BUSINESS
HEALTH SERVICES, ARIZONA DEPT OF	CASA GRANDE, AZ #R903 - DESIGN, INSTALLATION AND P	\$146,176.96	\$146,176.96	2015	4/16/2015	SS001530416	SS001260003	0	OTHER THAN SMALL BUSINESS
MARY MCLARNON MD	IGF::OT::IGF OTHER FUNCTIONS ARIZONA ELECTRONIC DEATH RECORD TRANSFER FOR OPTION YEAR III, PERIOD OF PERFORMANCE JANUARY 1, 2015 - DECEMBER 31, 2015.	\$146,070.00	\$146,070.00	2015	12/22/2014	4	SS001260014	0	OTHER THAN SMALL BUSINESS
FRANCIS, ANTHONY	IGF::CL::IGF RMC INDEPENDENT MEDICAL CASE REVIEWS.	\$145,798.40	\$145,798.40	2016	5/9/2016	1	SS02164C015	0	SMALL BUSINESS
JOHN N MENIO	ME EXPRESS REPORTING - MENTAL HEALTH IGF::CT::IGF	\$143,270.00	\$143,270.00	2015	9/30/2015	2015	SS10691170010	0	SMALL BUSINESS
ARCEGA, NATHANIEL DR MD	ME EXPRESS REPORTING - MENTAL HEALTH IGF::CT::IGF	\$143,250.00	\$143,250.00	2015	9/30/2015	2015	SS10381130040	0	SMALL BUSINESS
AUTOMATED ENVIRONMENTS, INC.	IGF::CL::IGF REGIONAL MEDICAL CONSULTANT SERVICES FOR SOCIAL SECURITY ADMINISTRATION. REVIEWS AND HOURS BY MEDICAL CONSULTANT OF DISABILITY CLAIM CASE FILES FOR AGENCY DISABILITY PROGRAM.	\$142,700.80	\$142,700.80	2016	5/17/2016	4	SS10154C002	0	SMALL BUSINESS
MOURA, BARBARA	VE EXPRESS REPORTING IGF::CT::IGF	\$142,207.00	\$142,207.00	2015	9/30/2015	20152	SS10541140151	0	SMALL BUSINESS
HERMAN MILLER, INC.	IGF::CL::IGF REGION 9 MEDICAL CONSULTANTS. REVIEWS BY MEDICAL CONSULTANT OF DISABILITY CLAIM CASE FILES FOR AGENCY DISABILITY PROGRAM. CALL ORDER TO AWARD BARBARA MOURA 1700 CASES AND 4 NON- CASE HOURS.	\$142,166.52	\$142,166.52	2016	2/29/2016	1	SS09164C023	0	SMALL BUSINESS
GRIFFIN PH.D, GLENN	PANAMA CITY, FL #R668 - INSTALLATION SERVICES AND	\$142,045.06	\$142,045.06	2015	5/18/2015	SS001530514	SS001260003	0	OTHER THAN SMALL BUSINESS
	VE EXPRESS REPORTING IGF::CT::IGF	\$141,720.00	\$141,720.00	2015	9/30/2015	2015	SS10881190020	0	SMALL BUSINESS

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Vendor Name	Description of Requirement	Action Obligation	Base and All Options Value	Fiscal Year	Date Signed	PO/Delivery Order/Task Order/Call#	Parent Contract	Mod #	Contracting Officers Business Size Selection
ELLEN PSY D GARA	IGF::CL::IGF REGIONAL MEDICAL CONSULTANT TO CONDUCT INDEPENDENT CASE REVIEWS. REVIEWS BY MEDICAL CONSULTANT OF DISABILITY CLAIM CASE FILES FOR AGENCY DISABILITY PROGRAM	\$140,000.00	\$140,000.00	2016	7/12/2016	5	SS03154C027	0	SMALL BUSINESS
NEW YORK, CITY OF	IGF::CT::IGF WATER AND SEWER SERVICES AT THE JOSEPH P ADDABBO BUILDING IN JAMAICA, NY.	\$140,000.00	\$140,000.00	2016	6/13/2016	SS021650006		0	OTHER THAN SMALL BUSINESS
GAIR, CELINE PAYNE PHD	MEDICAL CONTRACTOR SERVICES - MENTAL CASES CLOSELY ASSOCIATED TO INHERENTLY GOVERNMENTAL FUNCTION IGF::CL::IGF	\$139,417.00	\$139,417.00	2015	6/22/2015	16	SS041040091	0	SMALL BUSINESS
KANG CHANG-WUK MD PA	IGF::CT::IGF NEW CALL ORDER FOR BPA 6/1/2015 DR. KANG SS00-11-40086	\$139,400.00	\$139,400.00	2016	11/15/2015	8	SS001140086	2	SMALL BUSINESS
JOHN A. PELLA, M.D., LTD.	ME EXPRESS REPORTING - MENTAL HEALTH IGF::CT::IGF	\$138,770.00	\$138,770.00	2015	9/30/2015	2015	SS11501110068	0	SMALL BUSINESS
CORINNE PORTER	VE EXPRESS REPORTING IGF::CT::IGF	\$138,180.00	\$138,180.00	2015	9/30/2015	2015	SS10881190077	0	SMALL BUSINESS
FRANCIS, ANTHONY	ME EXPRESS REPORTING - MENTAL HEALTH IGF::CT::IGF	\$137,480.00	\$137,480.00	2015	9/30/2015	20151	SS10691170010	0	SMALL BUSINESS
HERMAN MILLER, INC.	BRUNSWICK, GA C614 DESIGN, PRODUCT AND INSTALLA	\$137,435.08	\$137,435.08	2017	10/28/2016	SS001730021	SS001260003	0	OTHER THAN SMALL BUSINESS
AUTOMATED ENVIRONMENTS, INC.	VE EXPRESS REPORTING IGF::CT::IGF	\$137,258.00	\$137,258.00	2015	9/30/2015	20153	SS10541140151	0	SMALL BUSINESS
GREEN, STEPHANIE	IGF::CL::IGF SS01-16-4C021 GREEN, STEPHANIE - CALL ORDER FOR 1700 INDEPENDENT DISABILITY CASE REVIEWS FOR THE PERIOD OF PERFORMANCE 04/01/2016 - 03/31/2017. THE RATE OF PAY IS \$80.14 PER CASE FOR TOTAL FUNDING OF \$136,238.	\$136,238.00	\$136,238.00	2016	3/1/2016	1	SS01164C021	0	SMALL BUSINESS
WILLIAM BACKLUND MD	BACKLUND - MC, REGION 10 ADD FUNDING AND CASES IGF::CL::IGF CLOSELY ASSOCIATED	\$136,000.00	\$136,000.00	2016	2/8/2016	2	SS10154C004	0	SMALL BUSINESS
DEPARTMENT OF HEALTH MINNESOTA	IGF::CL::IGF CLOSELY ASSOCIATED MN SS00-12-60024 ELECTRONIC DEATH REGISTRATION DELIVERY ORDER. 49,000EDR RECORDS TOTAL DELIVERY ORDER \$135,875.00. PERIOD OF PERFORMANCE 1/01/2016 - 12/31/2016.	\$135,975.00	\$135,975.00	2016	12/22/2015	5	SS001260024	0	OTHER THAN SMALL BUSINESS
TELFORD TYLER JANET	MEDICAL CONSULTANT SERVICES - MENTAL CASES CLOSELY ASSOCIATED TO INHERENTLY GOVERNMENTAL FUNCTION IGF::CL::IGF	\$135,316.50	\$135,316.50	2015	6/23/2015	12	SS041140070	0	SMALL BUSINESS
ANDERSON, JAMES N. MD	ME EXPRESS REPORTING - MENTAL HEALTH IGF::CT::IGF	\$135,278.59	\$135,278.59	2015	9/30/2015	2015	SS10541140160	0	SMALL BUSINESS
SZS CONSULTING LTD	IGF::CL::IGF SUBJECT MATTER EXPERT CONSULTING SUPP	\$50,000.00	\$135,000.00	2016	9/21/2016	SS001650248		0	OTHER THAN SMALL BUSINESS
HERMAN MILLER, INC.	J169 SADDLEBROOK (TSC), NJ - DESIGN, INSTALLATION A	\$134,146.50	\$134,146.50	2015	3/16/2015	SS001530321	SS001260003	0	OTHER THAN SMALL BUSINESS
CROSS III, GEORGE LEE MD	IGF::CL::IGF MODIFICATION TO ADD CASES - PHYSICAL CA	\$133,440.00	\$133,440.00	2016	5/25/2016	2	SS04164C039	1	SMALL BUSINESS
PUBLIC HEALTH, ALABAMA DEPARTMENT OF	IGF::CL::IGF CLOSELY ASSOCIATED AL-SS00-12-60012 ELECTRONIC DEATH REGISTRATION DELIVERY ORDER. 36,000 EDR RECORDS AT \$3.17 PER RECORD AND 12,000 EDR RECORDS AT \$1.59 PER RECORD. TOTAL DELIVERY ORDER \$133,200. PERIOD OF PERFORMANCE 1/01/2016 - 12/31/2016.	\$133,200.00	\$133,200.00	2016	12/22/2015	5	SS001260012	0	OTHER THAN SMALL BUSINESS

Sole Source Contracts  
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Vendor Name	Description of Requirement	Action Obligation	Base and All Options Value	Fiscal Year	Date Signed	PO/Delivery Order/Task Order/Call#	Parent Contract	Mod #	Contracting Officers Business Size Selection
IGF::CL::IGF BLANKET PURCHASE AGREEMENTS FOR CONTRACTORS TO PROVIDE REGIONAL MEDICAL CONSULTANT SERVICES FOR THE SOCIAL SECURITY ADMINISTRATION. REVIEWS BY MEDICAL CONSULTANT OF DISABILITY CLAIM CASE FILES FOR AGENCY DISABILITY PROGRAM. MODIFICATION TO ADD CASES AND EXTEND THE PERIOD OF PERFORMANCE.									
IGF::CL::IGF BLANKET PURCHASE AGREEMENTS FOR CONTRACTORS TO PROVIDE REGIONAL MEDICAL CONSULTANT SERVICES FOR THE SOCIAL SECURITY ADMINISTRATION. REVIEWS BY MEDICAL CONSULTANT OF DISABILITY CLAIM CASE FILES FOR AGENCY DISABILITY PROGRAM. MODIFICATION TO ADD CASES AND EXTEND THE PERIOD OF PERFORMANCE.									
MOURA, BARBARA	IGF::CL::IGF BLANKET PURCHASE AGREEMENTS FOR CONTRACTORS TO PROVIDE REGIONAL MEDICAL CONSULTANT SERVICES FOR THE SOCIAL SECURITY ADMINISTRATION. REVIEWS BY MEDICAL CONSULTANT OF DISABILITY CLAIM CASE FILES FOR AGENCY DISABILITY PROGRAM. MODIFICATION TO ADD CASES AND EXTEND THE PERIOD OF PERFORMANCE.	\$133,023.00	\$133,023.00	2016	7/31/2016	1	SS09164C023	1	SMALL BUSINESS
CUMMINGS, ALAN E.	VE EXPRESS REPORTING IGF::CT::IGF	\$132,812.00	\$132,812.00	2015	9/30/2015	2015	SS10881190025	0	OTHER THAN SMALL BUSINESS
IGF::OT::IGF OTHER FUNCTIONS MN RECEIPT OF ELECTRONIC DEATH RECORDS FOR OPTION YEAR III PERIOD OF PERFORMANCE JANUARY 1, 2015 - DECEMBER 31, 2015.									
DEPARTMENT OF HEALTH MINNESOTA	IGF::OT::IGF OTHER FUNCTIONS MN RECEIPT OF ELECTRONIC DEATH RECORDS FOR OPTION YEAR III PERIOD OF PERFORMANCE JANUARY 1, 2015 - DECEMBER 31, 2015.	\$132,545.00	\$132,545.00	2015	12/22/2014	4	SS001260024	0	OTHER THAN SMALL BUSINESS
EDAC SYSTEMS, INC.	DEBT MANAGEMENT SCANNER FOR MATPSC	\$132,394.86	\$132,394.86	2016	9/21/2016	SS001650260		0	SMALL BUSINESS
PETERSON, DAVID B	VE EXPRESS REPORTING IGF::CT::IGF	\$131,980.00	\$131,980.00	2015	9/30/2015	2015	SS10881190090	0	SMALL BUSINESS
IGF::CL::IGF MEDICAL CONTRACTOR SERVICES - MENTAL CASES CLOSELY ASSOCIATED TO INHERENTLY GOVERNMENTAL FUNCTION									
DISABILITY CONSULTANTS, LLC	IGF::CL::IGF MEDICAL CONTRACTOR SERVICES - MENTAL CASES CLOSELY ASSOCIATED TO INHERENTLY GOVERNMENTAL FUNCTION	\$131,216.00	\$131,216.00	2015	6/24/2015	41	SS041140025	0	SMALL BUSINESS
IGF::CL::IGF MEDICAL CONTRACTOR SERVICES - PHYSICAL CASES CLOSELY ASSOCIATED TO INHERENTLY GOVERNMENTAL FUNCTION									
DISABILITY CONSULTANTS, LLC	IGF::CL::IGF MEDICAL CONTRACTOR SERVICES - PHYSICAL CASES CLOSELY ASSOCIATED TO INHERENTLY GOVERNMENTAL FUNCTION	\$131,216.00	\$131,216.00	2015	6/24/2015	40	SS041140025	0	SMALL BUSINESS
BROWN, MC, SS10-15-4C001 ADD FUNDS AND CASES									
BROWN, ROY C	IGF::CL::IGF CLOSELY ASSOCIATED	\$130,500.00	\$130,500.00	2016	2/8/2016	2	SS10154C001	0	SMALL BUSINESS
KASPAR, RICHARD C	IGF::CL::IGF CLOSELY ASSOCIATED - CALL ORDER FOR II	\$130,240.00	\$130,240.00	2016	7/18/2016	2	SS07164C009	0	SMALL BUSINESS
LEE, CHARLES K	IGF::CL::IGF CLOSELY ASSOCIATED - REGIONAL MEDICA	\$130,240.00	\$130,240.00	2016	6/1/2016	3	SS07164C012	0	SMALL BUSINESS
IGF::CL::IGF CLOSELY ASSOCIATED SS01-16-4C001 CALL ORDER 0001- MELEZ, KATHLEEN - ESTABLISH A NEW CALL ORDER FOR DR. KATHLEEN MELEZ FOR THE PERIOD OF PERFORMANCE 02/01/2016-01/31/2017.									
MELEZ, KATHLEEN ANNE	IGF::CL::IGF CLOSELY ASSOCIATED SS01-16-4C001 CALL ORDER 0001- MELEZ, KATHLEEN - ESTABLISH A NEW CALL ORDER FOR DR. KATHLEEN MELEZ FOR THE PERIOD OF PERFORMANCE 02/01/2016-01/31/2017.	\$130,000.00	\$130,000.00	2016	1/20/2016	1	SS01164C001	0	SMALL BUSINESS
IGF::CT::IGF WATER AND SEWER SERVICES AT THE JOSEPH P ADDABBO BUILDING IN JAMAICA NY.									
NEW YORK, CITY OF	IGF::CT::IGF WATER AND SEWER SERVICES AT THE JOSEPH P ADDABBO BUILDING IN JAMAICA NY.	\$130,000.00	\$130,000.00	2015	6/10/2015	SS021550007		0	OTHER THAN SMALL BUSINESS
IGF::OT::IGF OTHER FUNCTIONS ALABAMBA DELIVERY ORDER FOR RECEIPT OF ELECTRONIC DEATH RECORDS FOR THE PERIOD OF PERFORMANCE JANUARY 1, 2015 - DECEMBER 31, 2015.									
PUBLIC HEALTH, ALABAMA DEPARTMENT OF	IGF::OT::IGF OTHER FUNCTIONS ALABAMBA DELIVERY ORDER FOR RECEIPT OF ELECTRONIC DEATH RECORDS FOR THE PERIOD OF PERFORMANCE JANUARY 1, 2015 - DECEMBER 31, 2015.	\$129,840.00	\$129,840.00	2015	12/22/2014	4	SS001260012	0	OTHER THAN SMALL BUSINESS
MITGANG MD, ROBERT N	IGF::CL::IGF MODIFICATION TO ADD CASES AND EXTEND	\$129,770.40	\$129,770.40	2016	7/26/2016	1	SS09164C027	1	SMALL BUSINESS
IGF::CL::IGF REGION 9 MEDICAL CONSULTANTS. REVIEWS BY MEDICAL CONSULTANT OF DISABILITY CLAIM CASE FILES FOR AGENCY DISABILITY PROGRAM. CALL ORDER TO AWARD MYLES FRIEDLAND 1,525 CASES AND 23 NON-CASE HOURS.									
MYLES FRIEDLAND	IGF::CL::IGF REGION 9 MEDICAL CONSULTANTS. REVIEWS BY MEDICAL CONSULTANT OF DISABILITY CLAIM CASE FILES FOR AGENCY DISABILITY PROGRAM. CALL ORDER TO AWARD MYLES FRIEDLAND 1,525 CASES AND 23 NON-CASE HOURS.	\$129,407.49	\$129,407.49	2016	2/26/2016	1	SS09164C036	0	SMALL BUSINESS
IGF::OT::IGF REPAIR THE SSA PUBLIC ADDRESS SYSTEM									
BALTIMORE SOUND ENGINEERING, INC.	IGF::OT::IGF REPAIR THE SSA PUBLIC ADDRESS SYSTEM	\$129,205.00	\$129,205.00	2015	5/6/2015	SS001530427	SS001360029	0	SMALL BUSINESS
TAKKI, LARRY P	VE EXPRESS REPORTING IGF::CT::IGF	\$129,054.73	\$129,054.73	2015	9/30/2015	2015	SS11501110055	0	SMALL BUSINESS

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Vendor Name	Description of Requirement	Action Obligation	Base and All Options Value	Fiscal Year	Date Signed	PO/Delivery Order/Task Order/Call#	Parent Contract	Mod #	Contracting Officers Business Size Selection
KANG CHANG-WUK MD PA	OMA MEDICAL CONSULTANTS. REVIEWS BY MEDICAL CONSULTANT OF DISABILITY CLAIM CASE FILES FOR AGENCY DISABILITY PROGRAM. ADDING INDEPENDENT CASE REVIEWS. IGF::CL::IGF	\$129,000.00	\$129,000.00	2016	8/11/2016	1	SS00164C025	1	SMALL BUSINESS
HEALTH AND HUMAN SERVICES, MAINE DEPARTMENT OF	IGF::OT::IGF OTHER FUNCTIONS ME RECEIPT OF NON-ELECTRONIC DEATH RECORDS OPTION YEAR III PERIOD OF PERFORMANCE JANUARY 1, 2015 - DECEMBER 31, 2015.	\$12,040.00	\$128,460.00	2015	12/22/2014	4	SS001260043	0	OTHER THAN SMALL BUSINESS
EDAC SYSTEMS, INC.	MAINTENANCE FOR IBML SCANNERS.	\$128,444.95	\$128,444.95	2017	11/1/2016	SS001750018		0	SMALL BUSINESS
SANDELL, PHYLLIS	IGF::CL::IGF - SS01-16-4C026 - SANDELL, PHYLLIS - CALL C	\$128,224.00	\$128,224.00	2016	2/16/2016	1	SS01164C026	0	SMALL BUSINESS
ASSOCIATES FOR CAREER TRANSITION	VE EXPRESS REPORTING IGF::CT::IGF	\$127,924.00	\$127,924.00	2015	9/30/2015	2015	SS10631150339	0	SMALL BUSINESS
CHFS-DEPARTMENT FOR COMMUNITY BASED SERVICES	IGF::CL::IGF CLOSELY ASSOCIATED REQUEST EDR FUNDING FOR 2016 CONTRACT YEAR FOR KENTUCKY.	\$127,650.00	\$127,650.00	2016	12/22/2015	4	SS001260039	0	OTHER THAN SMALL BUSINESS
SANDRA FIORETTI	VE EXPRESS REPORTING IGF::CT::IGF	\$127,631.00	\$127,631.00	2015	9/30/2015	2015	SS10881190053	0	SMALL BUSINESS
D R MYERS DISTRIBUTING CO	DOCUTECTOR FORGERY DETECTION DATABASE SUBSCRIP	\$42,540.00	\$127,620.00	2016	2/12/2016	SS001650050		0	SMALL BUSINESS
JERDA M RILEY MD	REGION 5 MEDICAL CONSULTANTS IGF::CL::IGF	\$127,279.80	\$127,279.80	2016	6/27/2016	2	SS05164C021	0	SMALL BUSINESS
MURPHY MD PA, CHARLES M.	VE EXPRESS REPORTING IGF::CT::IGF	\$126,880.00	\$126,880.00	2015	9/30/2015	2015	SS10781160092	0	SMALL BUSINESS
EMERGENT, LLC	MAINTENANCE ON INTERCEDE MYID SOFTWARE	\$126,631.63	\$126,631.63	2016	12/23/2015	SS001650042		0	OTHER THAN SMALL BUSINESS
THOMAS GREINER	VE EXPRESS REPORTING IGF::CT::IGF	\$126,186.78	\$126,186.78	2015	9/30/2015	2015	SS10781160199	0	SMALL BUSINESS
BROWN, ELIZABETH RAMOS	VE EXPRESS REPORTING IGF::CT::IGF	\$126,185.00	\$126,185.00	2015	9/30/2015	2015	SS10881190157	0	SMALL BUSINESS
PITNEY BOWES INC.	MAINTENANCE ON PITNEY BOWES SERVERS AND SOFTW	\$126,060.51	\$126,060.51	2015	12/31/2014	SS001550061		0	OTHER THAN SMALL BUSINESS
AUTOMATED ENVIRONMENTS, INC.	VE EXPRESS REPORTING IGF::CT::IGF	\$125,702.00	\$125,702.00	2015	9/30/2015	20154	SS10541140151	0	SMALL BUSINESS
HAWKINS, PAMELA GREEN PHD	IGF::CL::IGF  REGION 9 MEDICAL CONSULTANTS. REVIEWS BY MEDICAL CONSULTANT OF DISABILITY CLAIM CASE FILES FOR AGENCY DISABILITY PROGRAM. CALL ORDER TO AWARD PAMELA HAWKINS 1500 CASES AND 4 NON- CASE HOURS.	\$125,486.52	\$125,486.52	2016	2/29/2016	1	SS09164C037	0	SMALL BUSINESS
ROMAN RVS INC.	VE EXPRESS REPORTING IGF::CT::IGF	\$125,247.00	\$125,247.00	2015	9/30/2015	2015	SS10881190289	0	SMALL BUSINESS
MORRIS PSYD, KIM P	IGF::CL::IGF BLANKET PURCHASE AGREEMENTS FOR CONTRACTORS TO PROVIDE REGIONAL MEDICAL CONSULTANT SERVICES FOR THE SOCIAL SECURITY ADMINISTRATION. REVIEWS BY MEDICAL CONSULTANT OF DISABILITY CLAIM CASE FILES FOR AGENCY DISABILITY PROGRAM. MODIFICATION TO ADD CASES AND EXTEND THE PERIOD OF PERFORMANCE.	\$125,183.40	\$125,183.40	2016	7/29/2016	1	SS09164C022	1	SMALL BUSINESS
KNOTT MD, HURLEY W	IGF::CL::IGF MEDICAL CONTRACTOR SERVICES - PHYSICAL CASES CLOSELY ASSOCIATED TO INHERENTLY GOVERNMENTAL FUNCTION	\$125,100.00	\$125,100.00	2016	3/14/2016	2	SS04164C022	0	SMALL BUSINESS
BARBARA A COCHRAN M.D.	IGF::CL::IGF OMA MEDICAL CONSULTANTS. REVIEWS BY MEDICAL CONSULTANT OF DISABILITY CLAIM CASE FILES FOR AGENCY DISABILITY PROGRAM.	\$125,000.00	\$125,000.00	2016	5/31/2016	1	SS00164C008	0	SMALL BUSINESS

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Vendor Name	Description of Requirement	Action Obligation	Base and All Options Value	Fiscal Year	Date Signed	PO/Delivery Order/Task Order/Call#	Parent Contract	Mod #	Contracting Officers Business Size Selection
MICROSOFT CORPORATION SITZ IN REDMOND CORPORATION	IGF::CT::IGF  THE SOCIAL SECURITY ADMINISTRATION (SSA) OFFICE OF INSPECTOR GENERAL (OIG) REQUIRES MICROSOFT CONSULTING SERVICES (MCS) TO PROVIDE ENGINEERING AND CONSULTING ASSISTANCE TO DESIGN, BUILD, AND DEPLOY AN ALLEGATION CALL CENTER SOLUTION. THIS IS BEING ORDERED AS A TASK ORDER AGAINST EXISTING CONTRACT SS00-13-60014	\$124,991.00	\$124,991.00	2015	9/16/2015	22	SS001360014	0	OTHER THAN SMALL BUSINESS
HEALTH AND HOSPITALS, LOUISIANA DEPARTMENT OF IMMIXTECHNOLOGY, INC.	IGF::CL::IGF CLOSELY ASSOCIATED LA-SS00-12-60062 ELECTRONIC DEATH REGISTRATION DELIVERY ORDER. 33750 EDR RECORDS AT \$3.17 PER RECORD AND 11250 EDR RECORDS AT \$1.59 PER RECORD. TOTAL DELIVERY ORDER \$124,875 PERIOD OF PERFORMANCE 1/01/2016 - 12/31/2016	\$124,875.00	\$124,875.00	2016	12/22/2015	4	SS001260062	0	OTHER THAN SMALL BUSINESS
	RENEWAL OF SS00-16-51003 FOR MAINTENANCE ON HP	\$124,466.38	\$124,466.38	2017	10/6/2016	SS001750011		0	OTHER THAN SMALL BUSINESS
CHFS-DEPARTMENT FOR COMMUNITY BASED SERVICES	IGF::OT::IGF OTHER FUNCTIONS KY RECEIPT OF ELECTRONIC DEATH RECORDS FOR OPTION YEAR III PERIOD OF PERFORMANCE JANUARY 1, 2015 - DECEMBER 31, 2015.	\$124,430.00	\$124,430.00	2015	12/22/2014	3	SS001260039	0	OTHER THAN SMALL BUSINESS
MARK LEAPTROT	VE EXPRESS REPORTING IGF::CT::IGF	\$124,162.78	\$124,162.78	2015	9/30/2015	2015	SS10541140429	0	SMALL BUSINESS
AFFIGENT, LLC	PURCHASE OF ORACLE ADVANCED COMPRESSION PLUS \$	\$123,974.19	\$123,974.19	2016	8/16/2016	SS001630668	W91QUZ09A0001	0	OTHER THAN SMALL BUSINESS
M L BIJPURIA MD, FACS	IGF::CL::IGF OMA MEDICAL CONSULTANTS. REVIEWS BY MEDICAL CONSULTANT OF DISABILITY CLAIM CASE FILES FOR AGENCY DISABILITY PROGRAM. CREATE A NEW CALL ORDER FOR AWARD EFFECTIVE 6/1/2016 SS00-16-4C004 DR. BIJPURIA	\$123,850.00	\$123,850.00	2016	5/27/2016	1	SS00164C004	0	SMALL BUSINESS
MEDNICK ASSOCIATES LLC	TO ORDER CASES AND HOURS. ME EXPRESS REPORTING - MENTAL HEALTH IGF::CT::IGF	\$123,580.00	\$123,580.00	2015	9/30/2015	2015	SS11501310006	0	SMALL BUSINESS
HEALTH CONNECTION OF ILLINOIS P.C.	VE EXPRESS REPORTING IGF::CT::IGF	\$123,502.00	\$123,502.00	2015	9/30/2015	2015	SS10631150337	0	SMALL BUSINESS
HEALTH CONNECTION OF ILLINOIS P.C.	VE EXPRESS REPORTING IGF::CT::IGF	\$123,445.00	\$123,445.00	2015	9/30/2015	20151	SS10631150337	0	SMALL BUSINESS
MEDNICK ASSOCIATES LLC	ME EXPRESS REPORTING - MENTAL HEALTH IGF::CT::IGF	\$123,272.00	\$123,272.00	2015	9/30/2015	20151	SS11501310006	0	SMALL BUSINESS
SUMPTER GROUP	VE EXPRESS REPORTING IGF::CT::IGF	\$123,265.32	\$123,265.32	2015	9/30/2015	2015	SS10541140679	0	SMALL BUSINESS
BARNES, LAVERNE MONISE	REGION V MEDICAL CONSULTANT SERVICES FOR THE SOCIAL SECURITY ADMINISTRATION. REVIEWS BY MEDICAL CONSULTANT OF DISABILITY CLAIM CASE FILES FOR AGENCY DISABILITY PROGRAM. IGF::CL::IGF	\$123,174.00	\$123,174.00	2016	6/30/2016	2	SS05164C002	0	SMALL BUSINESS
DISABILITY CONSULTANTS, LLC	MEDICAL CONTRACTOR SERVICES - MENTAL CASES CLOSELY ASSOCIATED TO INHERENTLY GOVERNMENTAL FUNCTION IGF::CL::IGF	\$123,015.00	\$123,015.00	2015	4/27/2015	36	SS041140025	0	SMALL BUSINESS
HAMMONDS, T MICHAEL PHD	MEDICAL CONTRACTOR SERVICES - NON-CASES SERVICES CLOSELY ASSOCIATED TO INHERENTLY GOVERNMENTAL FUNCTION IGF::CL::IGF FOR CLOSELY ASSOCIATED	\$123,015.00	\$123,015.00	2015	6/23/2015	18	SS041140022	0	SMALL BUSINESS
DISABILITY CONSULTANTS, LLC	MEDICAL CONTRACTOR SERVICES - PHYSICAL CASES CLOSELY ASSOCIATED TO INHERENTLY GOVERNMENTAL FUNCTION IGF::CL::IGF	\$123,015.00	\$123,015.00	2015	6/24/2015	39	SS041140025	0	SMALL BUSINESS
REGAN, DIANE	ME EXPRESS REPORTING - MENTAL HEALTH IGF::CT::IGF	\$122,809.20	\$122,809.20	2015	9/30/2015	2015	SS10631150117	0	SMALL BUSINESS

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Vendor Name	Description of Requirement	Action Obligation	Base and All Options Value	Fiscal Year	Date Signed	PO/Delivery Order/Task Order/Call#	Parent Contract	Mod #	Contracting Officers Business Size Selection
NISHA SINGH MD	IGF::CL::IGF RMC TO CONDUCT INDEPENDENT CASE REVIEWS. REVIEWS BY MEDICAL CONSULTANT OF DISABILITY CLAIM CASE FILES FOR AGENCY DISABILITY PROGRESS	\$122,667.76	\$122,667.76	2016	7/15/2016	4	SS03154C011	0	SMALL BUSINESS
MARON, GAIL	VE EXPRESS REPORTING IGF::CT::IGF	\$122,570.00	\$122,570.00	2015	9/30/2015	2015	SS10881190213	0	SMALL BUSINESS
MEDNICK ASSOCIATES LLC	ME EXPRESS REPORTING - MENTAL HEALTH IGF::CT::IGF	\$122,313.00	\$122,313.00	2015	9/30/2015	20152	SS11501310006	0	SMALL BUSINESS
AUTOMATED ENVIRONMENTS, INC.	VE EXPRESS REPORTING IGF::CT::IGF	\$122,290.00	\$122,290.00	2015	9/30/2015	20155	SS10541140151	0	SMALL BUSINESS
MSA SOLUTIONS INC.	VE EXPRESS REPORTING IGF::CT::IGF	\$122,119.65	\$122,119.65	2015	9/30/2015	2015	SS10541140147	0	SMALL BUSINESS
HEALTH AND ENVIRONMENTAL CONTROL, SOUTH CAROLINA DEPARTMENT OF	IGF::CL::IGF CLOSELY ASSOCIATED SC SS00-12-60054 ELECTRONIC DEATH REGISTRATION DELIVERY ORDER. 44,000 EDR RECORDS TOTAL DELIVERY ORDER \$122,100.00. PERIOD OF PERFORMANCE 1/01/2016 - 12/31/2016.	\$122,100.00	\$122,100.00	2016	12/22/2015	5	SS001260054	0	OTHER THAN SMALL BUSINESS
STEVE COSGROVE & ASSOCIATES	VE EXPRESS REPORTING IGF::CT::IGF	\$122,079.93	\$122,079.93	2015	9/30/2015	2015	SS10541140303	0	SMALL BUSINESS
CAPITOL CASE MANAGEMENT INC	VE EXPRESS REPORTING IGF::CT::IGF	\$121,850.19	\$121,850.19	2015	9/30/2015	2015	SS10381130231	0	SMALL BUSINESS
HEALTH AND HOSPITALS, LOUISIANA DEPARTMENT OF	IGF::OT::IGF OTHER FUNCTIONS LA RECEIPT OF ELECTRONIC DEATH RECORDS FOR OPTION YEAR III PERIOD OF PERFORMANCE JANUARY 1, 2015 - DECEMBER 31, 2015.	\$121,725.00	\$121,725.00	2015	12/22/2014	3	SS001260062	0	OTHER THAN SMALL BUSINESS
SCOVERN, HENRY	IGF::CL::IGF REGION 3 CALL ORDER 0004 FOR 1,500 IND	\$121,628.00	\$121,628.00	2016	7/19/2016	4	SS03154C008	0	SMALL BUSINESS
C TIMOTHY BESSENT	OMA MEDICAL CONSULTANTS. REVIEWS BY MEDICAL CONSULTANT OF DISABILITY CLAIM CASE FILES FOR AGENCY DISABILITY PROGRAM. AWARDING DR. BESSENT INDEPENDENT CASE REVIEWS AND NON-CASE SERVICES IGF::CL::IGF	\$121,575.00	\$121,575.00	2016	5/31/2016	1	SS00164C002	0	SMALL BUSINESS
AROON SUANSILPPONGSE DR	IGF::CL::IGF OMA MEDICAL CONSULTANTS. REVIEWS BY MEDICAL CONSULTANT OF DISABILITY CLAIM CASE FILES FOR AGENCY DISABILITY PROGRAM.	\$121,550.00	\$121,550.00	2016	5/26/2016	1	SS00164C045	0	SMALL BUSINESS
BARRY F RUDNICK MD	IGF::CL::IGF OMA MEDICAL CONSULTANTS. REVIEWS BY MEDICAL CONSULTANT OF DISABILITY CLAIM CASE FILES FOR AGENCY DISABILITY PROGRAM.	\$121,550.00	\$121,550.00	2016	5/31/2016	1	SS00164C039	0	SMALL BUSINESS
KANG CHANG-WUK MD PA	IGF::CL::IGF OMA MEDICAL CONSULTANTS. REVIEWS BY MEDICAL CONSULTANT OF DISABILITY CLAIM CASE FILES FOR AGENCY DISABILITY PROGRAM.	\$121,550.00	\$121,550.00	2016	5/25/2016	1	SS00164C025	0	SMALL BUSINESS
ZUNIGA MD, LUIS M	IGF::CL::IGF OMA MEDICAL CONSULTANTS. REVIEWS BY MEDICAL CONSULTANT OF DISABILITY CLAIM CASE FILES FOR AGENCY DISABILITY PROGRAM.	\$121,550.00	\$121,550.00	2016	5/27/2016	1	SS00164C054	0	SMALL BUSINESS
ROBERT HUGHES MD	IGF::CL::IGF CLOSELY ASSOCIATED - CALL ORDER FOR IN	\$121,286.00	\$121,286.00	2016	6/30/2016	2	SS07164C008	0	SMALL BUSINESS
HEALTH, PENNSYLVANIA DEPARTMENT OF	IGF::OT::IGF OTHER FUNCTIONS PA RECEIPT OF NON-ELECTRONIC DEATH RECORDS FOR OPTION YEAR III PERIOD OF PERFORMANCE JANUARY 1, 2015 - DECEMBER 31, 2015.	\$121,260.00	\$121,260.00	2015	12/29/2014	4	SS001260040	0	OTHER THAN SMALL BUSINESS
MORRIS PSYD, KIM P	IGF::CL::IGF REGION 9 MEDICAL CONSULTANTS. REVIEWS BY MEDICAL CONSULTANT OF DISABILITY CLAIM CASE FILES FOR AGENCY DISABILITY PROGRAM. CALL ORDER TO AWARD KIM MORRIS 1440 CASES AND 4 NON-CASE HOURS.	\$120,482.52	\$120,482.52	2016	2/17/2016	1	SS09164C022	0	SMALL BUSINESS
ADAMO, SONYA A	IGF::CL::IGF OMA MEDICAL CONSULTANTS. REVIEWS BY MEDICAL CONSULTANT OF DISABILITY CLAIM CASE FILES FOR AGENCY DISABILITY PROGRAM.	\$120,400.00	\$120,400.00	2016	8/15/2016	1	SS00164C001	1	SMALL BUSINESS



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AROON SUANSILPPONGSE DR	IGF::CL::IGF OMA MEDICAL CONSULTANTS. REVIEWS BY MEDICAL CONSULTANT OF DISABILITY CLAIM CASE FILES FOR AGENCY DISABILITY PROGRAM. ADD CASE REVIEWS.	\$120,400.00	\$120,400.00	2016	8/22/2016	1	SS00164C045	1	SMALL BUSINESS
WALLS, PHILIP D MD	OMA MEDICAL CONSULTANTS. REVIEWS BY MEDICAL CONSULTANT OF DISABILITY CLAIM CASE FILES FOR AGENCY DISABILITY PROGRAM. ADDING CASE REVIEWS. IGF::CL::IGF	\$120,400.00	\$120,400.00	2016	9/19/2016	1	SS00164C050	1	SMALL BUSINESS
ADAMO, EVELYN FELEPPA	OMA MEDICAL CONSULTANTS. REVIEWS BY MEDICAL CONSULTANT OF DISABILITY CLAIM CASE FILES FOR AGENCY DISABILITY PROGRAM. ADDING NON-CASE SERVICES (AND/OR CASE REVIEWS AS APPLICABLE). IGF::CL::IGF	\$120,400.00	\$120,400.00	2016	8/29/2016	1	SS00164C055	1	SMALL BUSINESS
CARL BANCOFF MD	IGF::CL::IGF RMC TO CONDUCT INDEPENDENT CASE REVIEWS. REVIEWS BY MEDICAL CONSULTANT OF DISABILITY CLAIM CASE FILES FOR AGENCY DISABILITY PROGRESS.	\$120,368.00	\$120,368.00	2016	7/18/2016	3	SS03154C022	0	SMALL BUSINESS
IMMIXTECHNOLOGY, INC.	MAINTENANCE ON VARIOUS FORTIFY SOFTWARE LICENS	\$120,236.65	\$120,236.65	2016	10/6/2015	SS001651003		0	OTHER THAN SMALL BUSINESS
IORE PSYD, STACEY N	IGF::CL::IGF - SS01-16-4C007 - IORE, STACEY - CALL ORD	\$120,210.00	\$120,210.00	2016	2/13/2016	1	SS01164C007	0	SMALL BUSINESS
ALICE Z ROGADO MD	IGF::CL::IGF SS01-16-4C027 ROGADO, ALICE CALL ORDER FOR 1500 INDEPENDENT DISABILITY CASES FOR THE PERIOD 04/01/2016 - 03/31/2017. THE RATE OF PAY IS \$80.14 PER HOUR FOR TOTAL FUNDING OF \$120,210.	\$120,210.00	\$120,210.00	2016	2/17/2016	1	SS01164C027	0	SMALL BUSINESS
HEALTH DEPARTMENT, OKLAHOMA STATE	IGF::CL::IGF CLOSELY ASSOCIATED REQUEST EDR FUNDING FOR 2016 CONTRACT YEAR FOR OKLAHOMA.	\$119,880.00	\$119,880.00	2016	12/22/2015	5	SS001260045	0	OTHER THAN SMALL BUSINESS
MEDNICK ASSOCIATES LLC	ME EXPRESS REPORTING - MENTAL HEALTH IGF::CT::IGF	\$119,765.00	\$119,765.00	2015	9/30/2015	20153	SS11501310006	0	SMALL BUSINESS
HEALTH AND ENVIRONMENTAL CONTROL, SOUTH CAROLINA DEPARTMENT OF	IGF::OT::IGF OTHER FUNCTIONS SC RECEIPT OF ELECTRONIC DEATH RECORDS FOR OPTION YEAR III PERIOD OF PERFORMANCE JANUARY 1, 2015 - DECEMBER 31, 2015.	\$119,020.00	\$119,020.00	2015	12/22/2014	4	SS001260054	0	OTHER THAN SMALL BUSINESS
CYLUS CONSULTING PA	IGF::CL::IGF OMA MEDICAL CONSULTANTS. REVIEWS BY MEDICAL CONSULTANT OF DISABILITY CLAIM CASE FILES FOR AGENCY DISABILITY PROGRAM.	\$118,725.00	\$118,725.00	2016	5/31/2016	1	SS00164C010	0	SMALL BUSINESS
JOSEPH COOLS	MEDICAL SERVICE CONSULTANT JOSEPH COOLS, PH.D. IGF::CL::IGF	\$118,612.00	\$118,612.00	2016	3/1/2016	1	SS05164C007	0	SMALL BUSINESS
CORNELIUS, MARY	VE EXPRESS REPORTING IGF::CT::IGF	\$118,248.08	\$118,248.08	2015	9/30/2015	2015	SS10541140341	0	SMALL BUSINESS
BROOKS-WARREN M. D., JUANITA ANNETTE	MEDICAL CONTRACTOR SERVICES - MENTAL CASES CLOSLEY ASSOCIATED TO INHERENTLY GOVERNMENTAL FUNCTION IGF::CL::IGF	\$118,094.40	\$118,094.40	2015	6/22/2015	16	SS041040087	0	SMALL BUSINESS
INNOVATION DATA PROCESSING, INC.	THE PURCHASE OF ADDITIONAL MSU'S TO SUPPORT THE	\$117,896.80	\$117,896.80	2015	3/11/2015	SS001550008		3	OTHER THAN SMALL BUSINESS

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Vendor Name	Description of Requirement	Action Obligation	Base and All Options Value	Fiscal Year	Date Signed	PO/Delivery Order/Task Order/Call#	Parent Contract	Mod #	Contracting Officers Business Size Selection
MYLES FRIEDLAND PROREHAB, INC	IGF::CL::IGF BLANKET PURCHASE AGREEMENTS FOR CONTRACTORS TO PROVIDE REGIONAL MEDICAL CONSULTANT SERVICES FOR THE SOCIAL SECURITY ADMINISTRATION. REVIEWS BY MEDICAL CONSULTANT OF DISABILITY CLAIM CASE FILES FOR AGENCY DISABILITY PROGRAM. MODIFICATION TO ADD CASES, ADD NON-CASE SERVICE HOURS AND EXTEND THE PERIOD OF PERFORMANCE.	\$117,824.10	\$117,824.10	2016	7/29/2016	1	SS09164C036	1	SMALL BUSINESS
	VE EXPRESS REPORTING IGF::CT::IGF	\$117,739.73	\$117,739.73	2015	9/30/2015	2015	SS10541140685	0	SMALL BUSINESS
HILLEL RACLAU PHD BRABHAM JR, ROBERT E	IGF::CL::IGF RMC TO CONDUCT INDEPENDENT CASE REVIEWS. REVIEWS BY MEDICAL CONSULTANT OF DISABILITY CLAIM CASE FILES FOR AGENCY DISABILITY PROGRESS.	\$117,000.00	\$117,000.00	2016	7/12/2016	4	SS03154C024	0	SMALL BUSINESS
	VE EXPRESS REPORTING IGF::CT::IGF	\$116,954.68	\$116,954.68	2015	9/30/2015	2015	SS10541140283	0	SMALL BUSINESS
HEALTH DEPARTMENT, OKLAHOMA STATE CYNOWA, HARRY	IGF::OT::IGF OTHER FUNCTIONS OK RECEIPT OF ELECTRONIC DEATH RECORDS FOR OPTION YEAR III PERIOD OF PERFORMANCE JANUARY 1, 2015 - DECEMBER 31, 2015.	\$116,856.00	\$116,856.00	2015	12/22/2014	4	SS001260045	0	OTHER THAN SMALL BUSINESS
	ME EXPRESS REPORTING - MENTAL HEALTH IGF::CT::IGF	\$116,269.70	\$116,269.70	2015	9/30/2015	2015	SS10631150075	0	SMALL BUSINESS
KANG CHANG-WUK MD PA	IGF::CT::IGF NEW CALL ORDER FOR BPA 6/1/2015 DR. KANG SS00-11-40086	\$116,030.00	\$116,030.00	2015	4/15/2015	8	SS001140086	0	SMALL BUSINESS
MAURICE PROUT CAREER EDUCATION CORPORATION	THE PURPOSE OF THIS ACTION IS TO ADD INDEPENDENT CASE REVIEWS AT THE BPA RATES. IGF::CL::IGF	\$115,425.00	\$115,425.00	2016	3/15/2016	3	SS03154C021	0	SMALL BUSINESS
	VE EXPRESS REPORTING IGF::CT::IGF	\$115,372.00	\$115,372.00	2015	9/30/2015	2015	SS10251120067	0	SMALL BUSINESS
STRATEGIC CONSULTING SERVICES, INC.	VE EXPRESS REPORTING IGF::CT::IGF	\$115,243.00	\$115,243.00	2015	9/30/2015	2015	SS11521100091	0	SMALL BUSINESS
HARPOOL, WILLIAM R	VE EXPRESS REPORTING IGF::CT::IGF	\$115,036.22	\$115,036.22	2015	9/30/2015	2015	SS10541140525	0	SMALL BUSINESS
MARTIN, HILDA KLEIN	REGION V MEDICAL CONSULTANT SERVICES FOR THE SOCIAL SECURITY ADMINISTRATION. REVIEWS BY MEDICAL CONSULTANT OF DISABILITY CLAIM CASE FILES FOR AGENCY DISABILITY PROGRAM. AWARDING DR. HILDA MARTIN INDEPENDENT CASE REVIEWS. IGF::CL::IGF	\$114,962.40	\$114,962.40	2016	6/24/2016	2	SS05164C013	0	SMALL BUSINESS
MITGANG MD, ROBERT N	IGF::CL::IGF  REGION 9 MEDICAL CONSULTANTS. REVIEWS BY MEDICAL CONSULTANT OF DISABILITY CLAIM CASE FILES FOR AGENCY DISABILITY PROGRAM. CALL ORDER TO AWARD ROBERT MITGANG 1,377 CASES.	\$114,841.80	\$114,841.80	2016	2/29/2016	1	SS09164C027	0	SMALL BUSINESS
CROSS III, GEORGE LEE MD	MEDICAL CONSULTANT SERVICES - PHYSICAL CASES + NON-CASE SERVICES CLOSELY ASSOCIATED TO INHERENTLY GOVERNMENTAL FUNCTION IGF::CL::IGF	\$114,814.00	\$114,814.00	2015	6/24/2015	22	SS041140050	0	SMALL BUSINESS
SPITZ, GARY FRANKLIN SAWYER-LITTLE, JULIE ROCCO J. MEOLA	IGF::CL::IGF REGION 2 MEDICAL CONSULTANTS. REVIEWS BY MEDICAL CONSULTANT OF DISABILITY CLAIM CASE FILES FOR AGENCY DISABILITY PROGRAM. INCREASE IN CASE QUANTITY MEDICAL REVIEWS. VE EXPRESS REPORTING IGF::CT::IGF VE EXPRESS REPORTING IGF::CT::IGF	\$114,733.40 \$114,547.30 \$114,296.00	\$114,733.40 \$114,547.30 \$114,296.00	2016 2015 2015	5/3/2016 9/30/2015 9/30/2015	1 2015 2015	SS02164C020 SS10541140281 SS10251120019	1 0 0	SMALL BUSINESS SMALL BUSINESS SMALL BUSINESS

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Vendor Name	Description of Requirement	Action Obligation	Base and All Options Value	Fiscal Year	Date Signed	PO/Delivery Order/Task Order/Call#	Parent Contract	Mod #	Contracting Officers Business Size Selection
MARY MCLARNON MD	IGF::CL::IGF THIS IS A MODIFICATION TO ADD INDEPENDENT CASE REVIEWS TO THE EXISTING CALL ORDER #0011. THE REGION II RMC EVALUATES MEDICAL EVIDENCE FOR TITLE II AND TITLE XVI DISABILITY CLAIMS. REVIEWS.	\$114,268.00	\$114,268.00	2016	11/13/2015	11	SS021140095	3	SMALL BUSINESS
HERMAN MILLER, INC.	EX97 - OAKLAND (ODAR), CA - REQUISITION IS TO ORDER	\$114,240.00	\$114,240.00	2015	7/23/2015	SS001530403	SS001260003	1	OTHER THAN SMALL BUSINESS
HEALTHEWAY, INC.	IGF::OT::IGF MODIFICATION TO REVISE SECTION A PRICING TABLES AND SECTION B-1 STATEMENT OF WORK (SCOPE)TO THE SOLE-SOURCE MEMBERSHIP AGREEMENT/CONTRACT WITH THE NEW NON-FOR-PROFIT HEALTHEWAY THAT OPERATIONALLY MANAGES THE EHEALTH EXCHANGE	\$0.00	\$114,000.00	2015	3/2/2015	SS001360012		2	OTHER THAN SMALL BUSINESS
KASPAR, RICHARD C	IGF::CL::IGF CLOSELY ASSOCIATED - REGIONAL MEDICA	\$113,960.00	\$113,960.00	2016	3/25/2016	1	SS07164C009	0	SMALL BUSINESS
DIVISION OF VITAL RECORDS	ELECTRONIC DEATH REGISTRATION VIRGINIA THE PURPOSE OF MODIFICATION NUMBER 5 IS TO EXERCISE OPTION YEAR IV TO EXTEND THE TERM OF THE CONTRACT FROM JANUARY 1, 2016 THROUGH DECEMBER 31, 2016 FOR RECEIPT OF ELECTRONIC DEATH RECORDS.	\$0.00	\$113,700.00	2016	12/3/2015	SS001260044		5	OTHER THAN SMALL BUSINESS
DORSEY CONSULTING	VE EXPRESS REPORTING IGF::CT::IGF	\$113,381.92	\$113,381.92	2015	9/30/2015	2015	SS10541140297	0	SMALL BUSINESS
BROVENDER, ARTHUR MD	ME EXPRESS REPORTING - MENTAL HEALTH IGF::CT::IGF	\$113,280.00	\$113,280.00	2015	9/30/2015	2015	SS10541140146	0	SMALL BUSINESS
WINKLER MEDICAL PRACTICE, LLC	ME EXPRESS REPORTING - MENTAL HEALTH IGF::CT::IGF	\$113,230.00	\$113,230.00	2015	9/30/2015	2015	SS10691170014	0	SMALL BUSINESS
WEAVER, L JEAN MD	IGF::CL::IGF CLOSELY ASSOCIATED WEAVER, REGION 10 ADD FUNDING FOR CASE REVIEWS, MC SERVICES AND EXAMINATION AND ANALYSIS OF RMC CASE REVIEWS	\$113,114.68	\$113,114.68	2016	2/10/2016	11	SS101140019	0	SMALL BUSINESS
WOLFORD CONSULTING LLC	VE EXPRESS REPORTING IGF::CT::IGF	\$112,933.16	\$112,933.16	2015	9/30/2015	2015	SS10691170105	0	SMALL BUSINESS
STRATEGIC CONSULTING SERVICES, INC.	VE EXPRESS REPORTING IGF::CT::IGF	\$112,520.00	\$112,520.00	2015	9/30/2015	2015	SS11521100091	0	SMALL BUSINESS
FASTRAK REHABILITATION INC	VE EXPRESS REPORTING IGF::CT::IGF	\$112,107.00	\$112,107.00	2015	9/30/2015	2015	SS115111180103	0	OTHER THAN SMALL BUSINESS
WILLIAM BACKLUND MD	IGF::CL::IGF BACKLUND, MC, REG.10 ADDITION AND FUNDING OF INDEPENDENT CASE REVIEWS	\$112,050.00	\$112,050.00	2015	4/21/2015	1	SS10154C004	0	SMALL BUSINESS
DR. RENA M. POPMA, PSY.D.	IGF::CL::IGF CLOSELY ASSOCIATED - CALL ORDER FOR II	\$112,000.00	\$112,000.00	2016	8/23/2016	3	SS08154C002	0	SMALL BUSINESS
ANDREW PRZYBYLA MD PC	IGF::CL::IGF REGIONAL MEDICAL CONSULTANT SERVICES FOR THE SOCIAL SECURITY ADMINISTRATION. REVIEWS BY MEDICAL CONSULTANT OF DISABILITY CLAIM CASE FILES FOR AGENCY DISABILITY PROGRAM.	\$111,834.00	\$111,834.00	2016	5/5/2016	1	SS02164C018	1	SMALL BUSINESS
MITCHELL A SCHMIDT	VE EXPRESS REPORTING IGF::CT::IGF	\$111,817.66	\$111,817.66	2015	9/30/2015	2015	SS10381130181	0	SMALL BUSINESS
HALL, RICHARD B	VE EXPRESS REPORTING IGF::CT::IGF	\$111,476.58	\$111,476.58	2015	9/30/2015	2015	SS115011110029	0	SMALL BUSINESS
JACK KUNDIN	IGF::CL::IGF  REGION 9 MEDICAL CONSULTANTS. REVIEWS BY MEDICAL CONSULTANT OF DISABILITY CLAIM CASE FILES FOR AGENCY DISABILITY PROGRAM. CALL ORDER TO AWARD JACK KUNDIN 1300 CASES AND 30 NON-CASE HOURS.	\$111,318.90	\$111,318.90	2016	2/29/2016	1	SS09164C041	0	SMALL BUSINESS
KLEIN, PAUL Y	IGF::CL::IGF  REGION 9 MEDICAL CONSULTANTS. REVIEWS BY MEDICAL CONSULTANT OF DISABILITY CLAIM CASE FILES FOR AGENCY DISABILITY PROGRAM. CALL ORDER TO AWARD PAUL KLEIN 1,330 CASES AND 4 NON-CASE HOURS.	\$111,308.52	\$111,308.52	2016	2/26/2016	1	SS09164C039	0	SMALL BUSINESS
HERMAN MILLER, INC.	STILLWATER, OK (RB46) - SERVICES (DESIGN, INSTALLATI	\$111,201.08	\$111,201.08	2015	6/17/2015	SS001530631	SS001260003	0	OTHER THAN SMALL BUSINESS
APEX SERVICES	VE EXPRESS REPORTING IGF::CT::IGF	\$111,170.00	\$111,170.00	2015	9/30/2015	2015	SS10781160095	0	SMALL BUSINESS

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MAXIMUS FEDERAL SERVICES, INC.	TICKET PROGRAM DATA OPERATIONS CENTER MANAGER (TPDOCM) IGF::CT::IGF	\$111,057.00	\$111,057.00	2015	9/28/2015	SS001360046		3	OTHER THAN SMALL BUSINESS
DEPARTMENT OF HEALTH OHIO KRISHNAMURTHI, SUBRAMANIAM MD I	ELECTRONIC DEATH REGISTRATION OHIO THE PURPOSE OF MODIFICATION NUMBER 5 IS TO EXERCISE OPTION YEAR IV TO EXTEND THE TERM OF THE CONTRACT FROM JANUARY 1, 2016 THROUGH DECEMBER 31, 2016 FOR RECEIPT OF ELECTRONIC DEATH RECORDS. ME EXPRESS REPORTING - MENTAL HEALTH IGF::CT::IGF	\$0.00 \$110,880.00	\$111,000.00 \$110,880.00	2016 2015	12/30/2015 9/30/2015	SS001260047 2015		5 0	OTHER THAN SMALL BUSINESS SMALL BUSINESS
FRANCIS B BUDA MD DIVISION OF VITAL RECORDS	MEDICAL CONTRACTOR SERVICES - PHYSICAL CASES CLOSELY ASSOCIATED TO INHERENTLY GOVERNMENTAL FUNCTION IGF::CL::IGF	\$110,713.50	\$110,713.50	2015	6/22/2015	19	SS041140055	0	SMALL BUSINESS
TYRA A WATTS	ELECTRONIC DEATH REGISTRATION - VIRGINIA. THE PUR ME EXPRESS REPORTING - MENTAL HEALTH IGF::CT::IGF	\$0.00 \$110,260.27	\$110,700.00 \$110,260.27	2015	12/11/2014 9/30/2015	SS001260044 2015		4 0	OTHER THAN SMALL BUSINESS SMALL BUSINESS
NANCY M TARRAND	VE EXPRESS REPORTING IGF::CT::IGF	\$110,190.00	\$110,190.00	2015	9/30/2015	2015	SS10781160016	0	SMALL BUSINESS
CAMPION SERVICES INC	IGF::OT::IGF OGC WILL REQUIRE THE SERVICES OF AN EXPERT TO ASSIST IN A ARBITRATION CASE. A EXPERT WILL BE NEEDED TO ANALYZE THE "ADMINISTRATIVE LAW JUDGE WORK ANALYSIS STUDY" AND ALSO ANALYZE THE QUALIFICATIONS AND TESTIMONY OF THE UNION WITNESSES. THE CONTRACTOR WILL PROVIDE REPORTS, DECLARATIONS, AND TESTIMONY DETAILING THE UNIONS ANALYSIS IN THIS ARBITRATION.	\$110,000.00	\$110,000.00	2016	4/26/2016	SS001650106		0	SMALL BUSINESS
THOMSON REUTERS (PROFESSIONAL) UK LTD	IGF::OT::IGF WECOMPLY TRAINING SUBSCRIPTION CONTAINING A FULL ETHICS AND COMPLIANCE LIBRARY.	\$110,000.00	\$110,000.00	2015	8/3/2015	SS001550232		0	OTHER THAN SMALL BUSINESS
HUMAN SERVICES, OREGON DEPARTMENT OF	IGF::CL::IGF CLOSELY ASSOCIATED OR SS00-12-60042 ELECTRONIC DEATH REGISTRATION DELIVERY ORDER. 39,603 EDR RECORDS TOTAL DELIVERY ORDER \$109,897.93. PERIOD OF PERFORMANCE 1/01/2016 - 12/31/2016.	\$109,897.93	\$109,897.93	2016	12/22/2015	5	SS001260042	0	OTHER THAN SMALL BUSINESS
CHOPRA, MD, ARVIND AKINS PHD, FAREN R	IGF::CL::IGF REGION 2 MEDICAL CONSULTANTS. REVIEWS BY MEDICAL CONSULTANT OF DISABILITY CLAIM CASE FILES FOR AGENCY DISABILITY PROGRAM. VE EXPRESS REPORTING IGF::CT::IGF	\$109,763.00 \$109,370.00	\$109,763.00 \$109,370.00	2016 2015	5/9/2016 9/30/2015	1 2015	SS02164C004 SS10881190012	1 0	SMALL BUSINESS SMALL BUSINESS
IRON DATA SOLUTIONS, INC. (DE) SERGIO BELLO MD	IGF::OT::IGF  IDIQ CONTRACT SS00-11-60059(IRON DATA SOLUTIONS, INC.)--TASK ORDER 0071: IRON DATA ST. LOUIS AND TORONTO WINDOWS 2012 SERVER, WINDOWS IE11 COMPATABILITY AND OPERABILITY TESTING  PERIOD OF PERFORMANCE: 12/15/2014 THROUGH 06/15/2015 IGF::CL::IGF MODIFICATION TO ADD CASES, ADD NON-CA	\$109,192.00 \$108,903.15	\$109,192.00 \$108,903.15	2015 2016	12/15/2014 7/26/2016	71 1	SS001160059 SS09164C030	0 1	OTHER THAN SMALL BUSINESS SMALL BUSINESS
WEISS, HILLARY REIGEL VOCATIONAL CONSULTATION	MEDICAL CONSULTANT SERVICES HILLARY WEISS IGF::CL::IGF CLOSELY ASSOCIATED VE EXPRESS REPORTING IGF::CT::IGF	\$108,806.52 \$108,763.57	\$108,806.52 \$108,763.57	2016 2015	2/18/2016 9/30/2015	1 2015	SS09164C016 SS11521100081	0 0	SMALL BUSINESS SMALL BUSINESS

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SCHUMACHER, TIMOTHY G	IGF::CL::IGF BLANKET PURCHASE AGREEMENTS FOR CONTRACTORS TO PROVIDE REGIONAL MEDICAL CONSULTANT SERVICES FOR THE SOCIAL SECURITY ADMINISTRATION. REVIEWS BY MEDICAL CONSULTANT OF DISABILITY CLAIM CASE FILES FOR AGENCY DISABILITY PROGRAM. MODIFICATION TO ADD CASES AND EXTEND THE PERIOD OF PERFORMANCE.	\$108,753.60	\$108,753.60	2016	7/29/2016	1	SS09164C058	1	SMALL BUSINESS
PETER M SCHOSHEIM	ME EXPRESS REPORTING - MENTAL HEALTH IGF::CT::IGF	\$108,690.00	\$108,690.00	2015	9/30/2015	2015	SS10541140056	0	OTHER THAN SMALL BUSINESS
RICHARD H RIEDL, MS CRC LPC LTD	ME EXPRESS REPORTING - MENTAL HEALTH IGF::CT::IGF	\$108,300.02	\$108,300.02	2015	9/30/2015	2015	SS10631150121	0	SMALL BUSINESS
ALTERNATIVE CAREERS & TRANSITIONS INC	VE EXPRESS REPORTING IGF::CT::IGF	\$108,238.33	\$108,238.33	2015	9/30/2015	2015	SS10381130235	0	SMALL BUSINESS
MAY, MARY L	VE EXPRESS REPORTING IGF::CT::IGF	\$108,128.06	\$108,128.06	2015	9/30/2015	2015	SS10781260020	0	SMALL BUSINESS
BRENDEMUEHL, JUDITH	ME EXPRESS REPORTING - MENTAL HEALTH IGF::CT::IGF	\$108,107.80	\$108,107.80	2015	9/30/2015	2015	SS10381130066	0	SMALL BUSINESS
PDFTRON SYSTEMS INC	PDFNET LICENSES FOR DCE-FECS	\$108,000.00	\$108,000.00	2015	8/31/2015	SS001550263		0	OTHER THAN SMALL BUSINESS
CLARK, JULIAN J & RITA W MD PC	ME EXPRESS REPORTING - MENTAL HEALTH IGF::CT::IGF	\$107,890.00	\$107,890.00	2015	9/30/2015	2015	SS10251120078	0	SMALL BUSINESS
FASTRAK REHABILITATION INC	VE EXPRESS REPORTING IGF::CT::IGF	\$107,702.00	\$107,702.00	2015	9/30/2015	20151	SS11511180103	0	OTHER THAN SMALL BUSINESS
PARK, SEUNG J. MD	IGF::CL::IGF INDEPENDENT CASE REVIEWS.INCREASE QUANTITY CASE REVIEWS AND EXTEND PERIOD OF PERFORMANCE.	\$107,692.00	\$107,692.00	2016	6/16/2016	1	SS02164C016	1	SMALL BUSINESS
CAMPION MD, ROBERT	IGF::CL::IGF REGION 2 MEDICAL CONSULTANTS. REVIEWS BY MEDICAL CONSULTANT OF DISABILITY CLAIM CASE FILES. INCREASE QUANTITY CASE REVIEWS AND EXTEND PERIOD OF PERFORMANCE.	\$107,692.00	\$107,692.00	2016	6/14/2016	1	SS02164C003	2	SMALL BUSINESS
DUTTON LAMBERT CONSULTING, LLC	VE EXPRESS REPORTING IGF::CT::IGF	\$107,682.94	\$107,682.94	2015	9/30/2015	2015	SS10631350001	0	SMALL BUSINESS
CICERO, KRISTAN	VE EXPRESS REPORTING IGF::CT::IGF	\$107,595.00	\$107,595.00	2015	9/30/2015	2015	SS10541140080	0	SMALL BUSINESS
SMITH, ALISSA ANN	VE EXPRESS REPORTING IGF::CT::IGF	\$107,583.95	\$107,583.95	2015	9/30/2015	2015	SS10691170027	0	SMALL BUSINESS
RB REHABILITATION	VE EXPRESS REPORTING IGF::CT::IGF	\$107,283.18	\$107,283.18	2015	9/30/2015	2015	SS11501110013	0	SMALL BUSINESS
GREGORY D MCCORMACK MD	IGF::CL::IGF OMA MEDICAL CONSULTANTS. REVIEWS BY MEDICAL CONSULTANT OF DISABILITY CLAIM CASE FILES FOR AGENCY DISABILITY PROGRAM.	\$107,275.00	\$107,275.00	2016	5/25/2016	1	SS00164C031	0	SMALL BUSINESS
HARVEY L ALPERN MD	ME EXPRESS REPORTING - MENTAL HEALTH IGF::CT::IGF	\$107,273.00	\$107,273.00	2015	9/30/2015	2015	SS10881190038	0	SMALL BUSINESS
HUMAN SERVICES, OREGON DEPARTMENT OF	IGF::OT::IGF OTHER FUNCTIONS OR RECEIPT OF ELECTRONIC DEATH RECORDS FOR OPTION YEAR III PERIOD OF PERFORMANCE JANUARY 1, 2015 - DECEMBER 31, 2015.	\$107,125.73	\$107,125.73	2015	12/22/2014	4	SS001260042	0	OTHER THAN SMALL BUSINESS
VICTOR G ALBERIGI	VE EXPRESS REPORTING IGF::CT::IGF	\$106,949.00	\$106,949.00	2015	9/30/2015	2015	SS10251120029	0	SMALL BUSINESS
SAI R NIMMAGADDA	ME EXPRESS REPORTING - MENTAL HEALTH IGF::CT::IGF	\$106,860.00	\$106,860.00	2015	9/30/2015	2015	SS10631150294	0	SMALL BUSINESS
DEPARTMENT OF HEALTH OHIO	ELECTRONIC DEATH REGISTRATION - OHIO. THE PURPOSE	\$0.00	\$106,655.00	2015	12/29/2014	SS001260047		4	OTHER THAN SMALL BUSINESS
CROSS III, GEORGE LEE MD	MEDICAL CONSULTANT SERVICES - PHYSICAL CASES + NON-CASE SERVICES CLOSELY ASSOCIATED TO INHERENTLY GOVERNMENTAL FUNCTION IGF::CL::IGF	\$106,613.00	\$106,613.00	2015	2/5/2015	21	SS041140050	0	SMALL BUSINESS
BROWN, SANNAGAI	MEDICAL CONSULTANT SERVICES - PHYSICAL CASES CLOSELY ASSOCIATED TO INHERENTLY GOVERNMENTAL FUNCTION IGF::CL::IGF	\$106,613.00	\$106,613.00	2015	6/22/2015	13	SS041140041	0	SMALL BUSINESS
HELP/SYSTEMS, LLC	MAINTENANCE RENEWAL- ISERIES AUDIT AND VULNERA	\$106,311.00	\$106,311.00	2016	10/19/2015	SS001650015		0	OTHER THAN SMALL BUSINESS
MELISSA FASS KARLIN	VE EXPRESS REPORTING IGF::CT::IGF	\$106,300.00	\$106,300.00	2015	9/30/2015	2015	SS10251120017	0	SMALL BUSINESS
GARY FRANKLIN SPITZ	IGF::CL::IGF REGION 2 MEDICAL CONSULTANTS. REVIEWS BY MEDICAL CONSULTANT OF DISABILITY CLAIM CASE FILES FOR AGENCY DISABILITY PROGRAM.	\$106,106.00	\$106,106.00	2015	6/10/2015	13	SS021140106	0	SMALL BUSINESS

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ROBERT STARACE DR	IGF::CL::IGF REGION 2 MEDICAL CONSULTANTS. REVIEWS BY MEDICAL CONSULTANT OF DISABILITY CLAIM CASE FILES FOR AGENCY DISABILITY PROGRAM.	\$106,106.00	\$106,106.00	2015	2/24/2015	10	SS021140107	0	SMALL BUSINESS
JOSE J RABELO MD	IGF::CL::IGF REGION 2 MEDICAL CONSULTANTS. REVIEWS BY MEDICAL CONSULTANT OF DISABILITY CLAIM CASE FILES FOR AGENCY DISABILITY PROGRAM. MODIFICATION TO INCREASE QUANTITY AND EXTEND PERFORMANCE.	\$106,106.00	\$106,106.00	2015	5/29/2015	15	SS021140104	1	SMALL BUSINESS
JENNIFER L SULLIVAN	VE EXPRESS REPORTING IGF::CT::IGF	\$105,999.82	\$105,999.82	2015	9/30/2015	2015	SS10781160107	0	SMALL BUSINESS
ELVA J. MONTOYA, M.D., P.A.	IGF::CL::IGF MONTOYA - CALL ORDER - CASES	\$105,910.00	\$105,910.00	2015	5/26/2015	13	SS061140017	0	SMALL BUSINESS
EUTO, DR JEWEL	VE EXPRESS REPORTING IGF::CT::IGF	\$105,556.67	\$105,556.67	2015	9/30/2015	2015	SS10541140379	0	SMALL BUSINESS
ALTERNATIVE CAREERS & TRANSITIONS INC	VE EXPRESS REPORTING IGF::CT::IGF	\$105,553.00	\$105,553.00	2015	9/30/2015	2015	SS10381130235	0	SMALL BUSINESS
WILLIAM SELBY	VE EXPRESS REPORTING IGF::CT::IGF	\$105,333.93	\$105,333.93	2015	9/30/2015	2015	SS10541140221	0	SMALL BUSINESS
CHELTON MD MPH, LOUIS	MEDICAL CONSULTANT SERVICES - PHYSICAL CASES CLOSELY ASSOCIATED TO INHERENTLY GOVERNMENTAL FUNCTION IGF::CL::IGF FOR CLOSELY ASSOCIATED	\$105,300.00	\$105,300.00	2015	2/5/2015	12	SS041140044	0	SMALL BUSINESS
MATTHEWS, ZACHARY	ME EXPRESS REPORTING - MENTAL HEALTH IGF::CT::IGF	\$105,252.09	\$105,252.09	2015	9/30/2015	2015	SS10631150319	0	OTHER THAN SMALL BUSINESS
JAMES MC KENNA MD	ME EXPRESS REPORTING - MENTAL HEALTH IGF::CT::IGF	\$104,880.00	\$104,880.00	2015	9/30/2015	2015	SS10631150136	0	SMALL BUSINESS
MERCY SOUTHWEST INTERNAL MEDICINE PA	ME EXPRESS REPORTING - MENTAL HEALTH IGF::CT::IGF	\$104,850.00	\$104,850.00	2015	9/30/2015	2015	SS10781160054	0	SMALL BUSINESS
J & R CONSULTANTS INC	VE EXPRESS REPORTING IGF::CT::IGF	\$104,838.76	\$104,838.76	2015	9/30/2015	2015	SS10541140271	0	SMALL BUSINESS
GEORGE K GANAWAY, MD, PC	REGIONAL MEDICAL ADVISOR - CASE REVIEWS&CONSULTING SERVICES IGF::OT::IGF	\$104,833.40	\$104,833.40	2015	6/23/2015	11	SS041140071	0	SMALL BUSINESS
CHICAGO SOFT, LTD.	CHICAGO SOFTWARE MVS QUICK/REF	\$104,518.00	\$104,518.00	2016	5/16/2016	SS001650114		0	SMALL BUSINESS
ADAMO, EVELYN FELEPPA	IGF::CL::IGF OMA MEDICAL CONSULTANTS. REVIEWS BY MEDICAL CONSULTANT OF DISABILITY CLAIM CASE FILES FOR AGENCY DISABILITY PROGRAM.	\$104,350.00	\$104,350.00	2016	5/27/2016	1	SS00164C055	0	SMALL BUSINESS
ADAMO, SONYA A	IGF::CL::IGF OMA MEDICAL CONSULTANTS. REVIEWS BY MEDICAL CONSULTANT OF DISABILITY CLAIM CASE FILES FOR AGENCY DISABILITY PROGRAM.	\$104,350.00	\$104,350.00	2016	5/31/2016	1	SS00164C001	0	SMALL BUSINESS
MCWILLIAMS JUNKO	IGF::CL::IGF OMA MEDICAL CONSULTANTS. REVIEWS BY MEDICAL CONSULTANT OF DISABILITY CLAIM CASE FILES FOR AGENCY DISABILITY PROGRAM.	\$104,350.00	\$104,350.00	2016	5/25/2016	1	SS00164C033	0	SMALL BUSINESS
TENDLER, JACOB MD	IGF::CL::IGF OMA MEDICAL CONSULTANTS. REVIEWS BY MEDICAL CONSULTANT OF DISABILITY CLAIM CASE FILES FOR AGENCY DISABILITY PROGRAM.	\$104,350.00	\$104,350.00	2016	5/31/2016	1	SS00164C046	0	SMALL BUSINESS
SPRAGINS, JIM B	VE EXPRESS REPORTING IGF::CT::IGF	\$104,310.36	\$104,310.36	2015	9/30/2015	2015	SS10781160317	0	SMALL BUSINESS
REHABILITATION SERVICES INC	VE EXPRESS REPORTING IGF::CT::IGF	\$103,910.01	\$103,910.01	2015	9/30/2015	2015	SS10541140571	0	SMALL BUSINESS
STEWART, WILLIAM	VE EXPRESS REPORTING IGF::CT::IGF	\$103,869.72	\$103,869.72	2015	9/30/2015	2015	SS10541140457	0	SMALL BUSINESS
RICHMOND, JOISANNE	MEDICAL CONSULTANT SERVICES - PHYSICAL CASES CLOSELY ASSOCIATED TO INHERENTLY GOVERNMENTAL FUNCTION IGF::CL::IGF	\$103,660.00	\$103,660.00	2015	6/22/2015	11	SS041140045	0	SMALL BUSINESS
TAITZ, YAAKOV	VE EXPRESS REPORTING IGF::CT::IGF	\$103,514.00	\$103,514.00	2015	9/30/2015	2015	SS10251220002	0	OTHER THAN SMALL BUSINESS
BRENDEMUEHL, JUDITH	ME EXPRESS REPORTING - MENTAL HEALTH IGF::CT::IGF	\$103,507.00	\$103,507.00	2015	9/30/2015	2015	SS10381130066	0	SMALL BUSINESS
HARVEY L ALPERN MD	ME EXPRESS REPORTING - MENTAL HEALTH IGF::CT::IGF	\$103,357.00	\$103,357.00	2015	9/30/2015	2015	SS10881190038	0	SMALL BUSINESS
SCOTT, TROY L	VE EXPRESS REPORTING IGF::CT::IGF	\$103,235.00	\$103,235.00	2015	9/30/2015	2015	SS10881190191	0	SMALL BUSINESS
PINTI REHABILITATION MGMT	ME EXPRESS REPORTING - MENTAL HEALTH IGF::CT::IGF	\$103,028.50	\$103,028.50	2015	9/30/2015	2015	SS10631150201	0	SMALL BUSINESS
SIMS, DIANA C & ASSOCIATES INC	VE EXPRESS REPORTING IGF::CT::IGF	\$102,932.43	\$102,932.43	2015	9/30/2015	2015	SS10381130123	0	SMALL BUSINESS
DETTMER, DAVID M	VE EXPRESS REPORTING IGF::CT::IGF	\$102,929.00	\$102,929.00	2015	9/30/2015	2015	SS10881190045	0	SMALL BUSINESS

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Vendor Name	Description of Requirement	Action Obligation	Base and All Options Value	Fiscal Year	Date Signed	PO/Delivery Order/Task Order/Cal#	Parent Contract	Mod #	Contracting Officers Business Size Selection
MARSTON, EILEEN GROUP LLC	VE EXPRESS REPORTING IGF::CT::IGF	\$102,903.00	\$102,903.00	2015	9/30/2015	2015	SS10881190011	0	SMALL BUSINESS
LOMBARDI ASSOCIATES LLC	VE EXPRESS REPORTING IGF::CT::IGF	\$102,717.00	\$102,717.00	2015	9/30/2015	2015	SS10251320035	0	SMALL BUSINESS
KAPLAN, DR STEPHEN	ME EXPRESS REPORTING - MENTAL HEALTH IGF::CT::IGF	\$102,640.00	\$102,640.00	2015	9/30/2015	2015	SS11501110034	0	SMALL BUSINESS
BLASE, MD MARVIN	MEDICAL CONSULTANT SERVICES - MENTAL CASES CLOSELY ASSOCIATED TO INHERENTLY GOVERNMENTAL FUNCTION IGF::CL::IGF	\$102,512.50	\$102,512.50	2015	6/22/2015	14	SS041140059	0	SMALL BUSINESS
DISABILITY SERVICE PROVIDERS	ME EXPRESS REPORTING - MENTAL HEALTH IGF::CT::IGF	\$102,473.12	\$102,473.12	2015	9/30/2015	2015	SS10631150291	0	SMALL BUSINESS
MARK I OBERLANDER DR	ME EXPRESS REPORTING - MENTAL HEALTH IGF::CT::IGF	\$102,420.00	\$102,420.00	2015	9/30/2015	2015	SS10631150132	0	SMALL BUSINESS
WINFREY, NANCY L PHD	VE EXPRESS REPORTING IGF::CT::IGF	\$102,420.00	\$102,420.00	2015	9/30/2015	2015	SS11511180036	0	SMALL BUSINESS
MUNOZ, GILBERTO MD	ME EXPRESS REPORTING - MENTAL HEALTH IGF::CT::IGF	\$102,250.00	\$102,250.00	2015	9/30/2015	2015	SS10631150332	0	OTHER THAN SMALL BUSINESS
GLK CONDOR INC	VE EXPRESS REPORTING IGF::CT::IGF	\$101,927.00	\$101,927.00	2015	9/30/2015	2015	SS10381130073	0	SMALL BUSINESS
BAYOU HEALTHCARE PA	ME EXPRESS REPORTING - MENTAL HEALTH IGF::CT::IGF	\$101,730.00	\$101,730.00	2015	9/30/2015	2015	SS10781160104	0	SMALL BUSINESS
PETZELT, JOHN	MEDICAL CONSULTANT SERVICES - MENTAL CASES CLOSELY ASSOCIATED TO INHERENTLY GOVERNMENTAL FUNCTION IGF::CL::IGF	\$101,692.40	\$101,692.40	2015	2/19/2015	12	SS041140069	1	SMALL BUSINESS
ARTHUR L LEWY	IGF::CL::IGF LEWY, MC, REG. 10 ADDING AND FUNDING INDEPENDENT CASE REVIEWS	\$101,656.80	\$101,656.80	2015	5/19/2015	1	SS10154C007	0	SMALL BUSINESS
PAUL MORRISON	VE EXPRESS REPORTING IGF::CT::IGF	\$101,633.00	\$101,633.00	2015	9/30/2015	2015	SS11521100071	0	SMALL BUSINESS
COUCH, DAVID DON	ME EXPRESS REPORTING - MENTAL HEALTH IGF::CT::IGF	\$101,598.60	\$101,598.60	2015	9/30/2015	2015	SS10781360017	0	SMALL BUSINESS
HAMMOND, BOBBY W	ME EXPRESS REPORTING - MENTAL HEALTH IGF::CT::IGF	\$101,496.87	\$101,496.87	2015	9/30/2015	2015	SS10631150109	0	SMALL BUSINESS
HAGEN,JUNE C. PHD	VE EXPRESS REPORTING IGF::CT::IGF	\$101,494.00	\$101,494.00	2015	9/30/2015	2015	SS10881190139	0	SMALL BUSINESS
WASHINGTON, PHD, CAREY A	VE EXPRESS REPORTING IGF::CT::IGF	\$101,450.40	\$101,450.40	2015	9/30/2015	2015	SS10541140335	0	SMALL BUSINESS
M-TECH MECHANICAL, LLC	IGF::OT::IGF  OVERHAUL CHILLER NUMBER 6 IN THE WEST LOW RISE BUILDING INCLUDING UPGRADING STARTER AND CONTROL PANEL	\$101,345.00	\$101,345.00	2015	8/24/2015	SS001550252		0	SMALL BUSINESS
WATKINS, MYRON MD	IGF::CL::IGF WATKINS- CALL ORDER - REVIEWS	\$101,295.35	\$101,295.35	2015	7/21/2015	11	SS061140035	2	SMALL BUSINESS
BRASSFIELD, MELISSA	VE EXPRESS REPORTING IGF::CT::IGF	\$101,232.52	\$101,232.52	2015	9/30/2015	2015	SS10781160221	0	SMALL BUSINESS
MEADOWDALE MEDICAL CONSULTING, PLLC	IGF::CL::IGF MERRILL, MC, REG. 10 ADDITION AND FUNDING ON INDEPENDENT CASE REVIEWS	\$101,150.00	\$101,150.00	2015	6/8/2015	3	SS10154C000	0	SMALL BUSINESS
STEVEN GOLDSTEIN, M.D. & ASSOCIATES, P.A.	ME EXPRESS REPORTING - MENTAL HEALTH IGF::CT::IGF	\$101,140.00	\$101,140.00	2015	9/30/2015	2015	SS10781160148	0	SMALL BUSINESS
DOSTOYNIY COUNSELLING SERVICES	VE EXPRESS REPORTING IGF::CT::IGF	\$101,066.16	\$101,066.16	2015	9/30/2015	2015	SS11521100013	0	SMALL BUSINESS
BLANDO, ALICIA V	IGF::CL::IGF MODIFICATION TO ADD CASES, ADD NON-CASES	\$101,046.30	\$101,046.30	2016	7/24/2016	1	SS09164C031	1	SMALL BUSINESS
CHANDRASEKHAR MD, SREEDEVI	ME EXPRESS REPORTING - MENTAL HEALTH IGF::CT::IGF	\$100,980.00	\$100,980.00	2015	9/30/2015	2015	SS10251120114	0	SMALL BUSINESS
ALLIED CONSULTING INC	VE EXPRESS REPORTING IGF::CT::IGF	\$100,932.40	\$100,932.40	2015	9/30/2015	2015	SS10541140279	0	SMALL BUSINESS
MICROPACT GLOBAL, INC.	RENEWAL OF SS00-16-50017 FOR MAINTENANCE ON MENTAL HEALTH SERVICES	\$100,876.93	\$100,876.93	2017	10/21/2016	SS001750012		0	OTHER THAN SMALL BUSINESS
DAVID M GLASSMIRE	VE EXPRESS REPORTING IGF::CT::IGF	\$100,800.00	\$100,800.00	2015	9/30/2015	2015	SS10881190040	0	SMALL BUSINESS
SERGIO BELLO MD	IGF::CL::IGF  REGION 9 MEDICAL CONSULTANTS. REVIEWS BY MEDICAL CONSULTANT OF DISABILITY CLAIM CASE FILES FOR AGENCY DISABILITY PROGRAM. CALL ORDER TO AWARD SERGIO BELLO 1200 CASES AND 6 NON-CASE HOURS.	\$100,659.78	\$100,659.78	2016	2/29/2016	1	SS09164C030	0	SMALL BUSINESS
BALDWIN AND ASSOCIATES INC	VE EXPRESS REPORTING IGF::CT::IGF	\$100,550.16	\$100,550.16	2015	9/30/2015	2015	SS10381130019	0	SMALL BUSINESS
STEPHEN P DAVIS	VE EXPRESS REPORTING IGF::CT::IGF	\$100,532.00	\$100,532.00	2015	9/30/2015	2015	SS10881190153	0	SMALL BUSINESS
SKAHAN, KRISTINE	VE EXPRESS REPORTING IGF::CT::IGF	\$100,465.00	\$100,465.00	2015	9/30/2015	2015	SS10691170017	0	SMALL BUSINESS
H. RUDOLPH WARREN, M.D., P.C.	MEDICAL CONTRACTOR SERVICES - MENTAL CASES CLOSELY ASSOCIATED TO INHERENTLY GOVERNMENTAL FUNCTION IGF::CL::IGF	\$100,462.25	\$100,462.25	2015	2/19/2015	12	SS041140062	1	SMALL BUSINESS

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VANDERPLATE, CALVIN	MEDICAL CONTRACTOR SERVICES - MENTAL CASES CLOSELY ASSOCIATED TO INHERENTLY GOVERNMENTAL FUNCTION IGF::CL::IGF	\$100,462.25	\$100,462.25	2015	2/19/2015	14	SS041140065	1	SMALL BUSINESS
IRON DATA SOLUTIONS, INC. (DE)	IGF::OT::IGF IDIQ CONTRACT SS00-11-60059(IRON DATA SOLUTIONS, INC.) TASK ORDER 0073: IMPLEMENT CDB/DI CHANGES TO ENSURE CORRECT SYSTEMS OVERRIDE(SO)CODES ARE PASSED IN THE NATIONAL DISABILITY DETERMINATION SERVICE SYSTEM (NDDSS), UPDATE DDS FORMS TO REFLECT CURRENT REGULATORY AND POLICY REQUIREMENTS. PERIOD OF PERFORMANCE IS AWARD THROUGH 3-MONTHS (CLIN 1), AND AWARD THROUGH 4-MOTNHS (CLINS 2/3).	\$100,387.00	\$100,387.00	2015	3/12/2015	73	SS001160059	0	OTHER THAN SMALL BUSINESS
ELLEN ROZENFELD	MEDICAL CONSULTANT SERVICES DR. ELLEN ROZENFELD IGF::CL::IGF	\$100,364.00	\$100,364.00	2016	3/14/2016	1	SS05164C036	0	SMALL BUSINESS
MED VOC REHABILITATION LTD	ME EXPRESS REPORTING - MENTAL HEALTH IGF::CT::IGF	\$100,322.00	\$100,322.00	2015	9/30/2015	2015	SS10631150055	0	OTHER THAN SMALL BUSINESS
JEANINE METILDI	VE EXPRESS REPORTING IGF::CT::IGF	\$100,311.00	\$100,311.00	2015	9/30/2015	2015	SS10881190167	0	SMALL BUSINESS
NADOLSKY, JULIAN M	VE EXPRESS REPORTING IGF::CT::IGF	\$100,225.28	\$100,225.28	2015	9/30/2015	2015	SS10541140517	0	SMALL BUSINESS
COHEN, RICHARD W MD PC	ME EXPRESS REPORTING - MENTAL HEALTH IGF::CT::IGF	\$100,112.00	\$100,112.00	2015	9/30/2015	2015	SS10381130026	0	SMALL BUSINESS
BARTLETT, KELLY	VE EXPRESS REPORTING IGF::CT::IGF	\$100,057.00	\$100,057.00	2015	9/30/2015	2015	SS10881190201	0	SMALL BUSINESS
TECHFIRST, INC.	IGF::CT::IGF SIGN LANGUAGE INTERPRETER SERVICES NEEDED AS A REASONABLE ACCOMMODATION FOR EMPLOYEES WHO ARE DEAF OF HARD OF HEARING	\$100,000.00	\$100,000.00	2017	10/25/2016	SS001750014		0	SMALL BUSINESS
WORKING TOGETHER	VE EXPRESS REPORTING IGF::CT::IGF	\$99,956.00	\$99,956.00	2015	9/30/2015	2015	SS10541140257	0	SMALL BUSINESS
MD WEBER & ASSOCIATES	VE EXPRESS REPORTING IGF::CT::IGF	\$99,676.33	\$99,676.33	2015	9/30/2015	2015	SS10781160145	0	SMALL BUSINESS
JOSE J RABELO MD	IGF::CL::IGF REGION 2 MEDICAL CONSULTANTS. REVIEWS BY MEDICAL CONSULTANT OF DISABILITY CLAIM CASE FILES FOR AGENCY DISABILITY PROGRAM.	\$99,408.00	\$99,408.00	2016	6/28/2016	1	SS02164C019	2	SMALL BUSINESS
ROBERT STARACE DR	IGF::CL::IGF REGION 2 MEDICAL CONSULTANTS. REVIEWS BY MEDICAL CONSULTANT OF DISABILITY CLAIM CASE FILES FOR AGENCY DISABILITY PROGRAM. INCREASE CASE REVIEW QUANTITY AND EXTEND PERIOD OF PERFORMANCE.	\$99,408.00	\$99,408.00	2016	6/28/2016	1	SS02164C021	2	SMALL BUSINESS
WEAVER, L JEAN MD	MEDICAL CONSULTANT SERVICES IGF::CL::IGF CLOSELY ASSOCIATED	\$99,330.80	\$99,330.80	2015	4/6/2015	10	SS101140019	0	SMALL BUSINESS
PAULINE MCEACHIN	ME EXPRESS REPORTING - MENTAL HEALTH IGF::CT::IGF	\$99,133.82	\$99,133.82	2015	9/30/2015	2015	SS10631150245	0	SMALL BUSINESS
ROMAN, PEDRO M	VE EXPRESS REPORTING IGF::CT::IGF	\$99,102.00	\$99,102.00	2015	9/30/2015	2015	SS10541140479	0	SMALL BUSINESS
TERRY, KIMBERLEE R	INDEPENDENT CASE REVIEWS DR. KIMBERLEE TERRY (INTERNIST) REGION 8 IGF::CL::IGF	\$98,800.00	\$98,800.00	2016	2/8/2016	1	SS08164C025	1	SMALL BUSINESS
SZOLLOS, LOUIS P	VE EXPRESS REPORTING IGF::CT::IGF	\$98,749.00	\$98,749.00	2015	9/30/2015	2015	SS10251120049	0	OTHER THAN SMALL BUSINESS
AYERZA CONSULTING	VE EXPRESS REPORTING IGF::CT::IGF	\$98,645.83	\$98,645.83	2015	9/30/2015	2015	SS11521100017	0	SMALL BUSINESS
COURTRIGHT & ASSOCIATES INC	VE EXPRESS REPORTING IGF::CT::IGF	\$98,603.00	\$98,603.00	2015	9/30/2015	2015	SS10541140207	0	SMALL BUSINESS
KATHLEEN O'BRIEN	REGION V MEDICAL CONSULTANT SERVICES FOR THE SOCIAL SECURITY ADMINISTRATION. REVIEWS BY MEDICAL CONSULTANT OF DISABILITY CLAIM CASE FILES FOR AGENCY DISABILITY PROGRAM. INDEPENDENT CASE REVIEWS AGAINST SS05-15-4C008, CALL ORDER 3 IGF::CL::IGF	\$98,539.20	\$98,539.20	2016	6/30/2016	3	SS05154C008	0	SMALL BUSINESS



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LOCUM, INC.	REGIONAL MEDICAL CONTRACTOR SERVICES FOR REGION 10 IGF::CL::IGF CLOSELY ASSOCIATED	\$98,475.00	\$98,475.00	2016	7/18/2016	4	SS10164C002	0	SMALL BUSINESS
PETZELT, JOHN	MEDICAL CONSULTANT SERVICES - MENTAL CASES CLOSELY ASSOCIATED TO INHERENTLY GOVERNMENTAL FUNCTION IGF::CL::IGF	\$98,412.00	\$98,412.00	2015	6/23/2015	14	SS041140069	0	SMALL BUSINESS
LORIN LOVELY REHAB SERVICES	VE EXPRESS REPORTING IGF::CT::IGF	\$98,277.21	\$98,277.21	2015	9/30/2015	2015	SS10541140487	0	SMALL BUSINESS
CNK PUBLICATIONS, LLC	VE EXPRESS REPORTING IGF::CT::IGF	\$98,266.97	\$98,266.97	2015	9/30/2015	2015	SS10541140645	0	SMALL BUSINESS
VOCATIONAL MEDICAL CONSULTING, INC.	ME EXPRESS REPORTING - MENTAL HEALTH IGF::CT::IGF	\$98,193.00	\$98,193.00	2015	9/30/2015	2015	SS10631150317	0	SMALL BUSINESS
MED VOC REHABILITATION LTD	ME EXPRESS REPORTING - MENTAL HEALTH IGF::CT::IGF	\$98,155.00	\$98,155.00	2015	9/30/2015	20151	SS10631150055	0	OTHER THAN SMALL BUSINESS
BRIAN L WOMER	ME EXPRESS REPORTING - MENTAL HEALTH IGF::CT::IGF	\$98,103.71	\$98,103.71	2015	9/30/2015	2015	SS10631150213	0	SMALL BUSINESS
COHEN, RICHARD W MD PC	ME EXPRESS REPORTING - MENTAL HEALTH IGF::CT::IGF	\$98,038.00	\$98,038.00	2015	9/30/2015	20151	SS10381130026	0	SMALL BUSINESS
BIERLEY, BRIAN	VE EXPRESS REPORTING IGF::CT::IGF	\$97,945.58	\$97,945.58	2015	9/30/2015	2015	SS10381130131	0	SMALL BUSINESS
ANDREW PRZYBYLA MD PC	IGF::CL::IGF REGION 2 MEDICAL CONSULTANTS. REVIEWS BY MEDICAL CONSULTANT OF DISABILITY CLAIM CASE FILES FOR AGENCY DISABILITY PROGRAM.	\$97,944.00	\$97,944.00	2015	3/19/2015	10	SS021140103	0	SMALL BUSINESS
GARY FRANKLIN SPITZ	IGF::CL::IGF REGION 2 MEDICAL CONSULTANTS. REVIEWS BY MEDICAL CONSULTANT OF DISABILITY CLAIM CASE FILES FOR AGENCY DISABILITY PROGRAM.	\$97,944.00	\$97,944.00	2015	2/25/2015	12	SS021140106	0	SMALL BUSINESS
JOSE J RABELO MD	IGF::CL::IGF REGION 2 MEDICAL CONSULTANTS. REVIEWS BY MEDICAL CONSULTANT OF DISABILITY CLAIM CASE FILES FOR AGENCY DISABILITY PROGRAM.	\$97,944.00	\$97,944.00	2015	2/13/2015	15	SS021140104	0	SMALL BUSINESS
MARY MCLARNON MD	IGF::CL::IGF REGION 2 MEDICAL CONSULTANTS. REVIEWS BY MEDICAL CONSULTANT OF DISABILITY CLAIM CASE FILES FOR AGENCY DISABILITY PROGRAM.	\$97,944.00	\$97,944.00	2015	2/13/2015	10	SS021140095	0	SMALL BUSINESS
YARED, THOMAS A MD	IGF::CL::IGF REGION 2 MEDICAL CONSULTANTS. REVIEWS BY MEDICAL CONSULTANT OF DISABILITY CLAIM CASE FILES FOR AGENCY DISABILITY PROGRAM.	\$97,944.00	\$97,944.00	2015	3/13/2015	8	SS021140109	0	SMALL BUSINESS
SCHMIDT, STEPHEN B	VE EXPRESS REPORTING IGF::CT::IGF	\$97,862.00	\$97,862.00	2015	9/30/2015	2015	SS10881190105	0	SMALL BUSINESS
SEIFERT, LARRY	VE EXPRESS REPORTING IGF::CT::IGF	\$97,752.36	\$97,752.36	2015	9/30/2015	2015	SS10781160219	0	SMALL BUSINESS
PAUL, HEIDI	VE EXPRESS REPORTING IGF::CT::IGF	\$97,713.00	\$97,713.00	2015	9/30/2015	2015	SS10881190219	0	OTHER THAN SMALL BUSINESS
SEN, SANDIP	IGF::CL::IGF CLOSELY ASSOCIATED - CALL ORDER FOR I	\$97,680.00	\$97,680.00	2016	7/6/2016	2	SS07164C023	0	SMALL BUSINESS
JAVIER TORRES	IGF::CL::IGF CLOSELY ASSOCIATED - CALL ORDER FOR I	\$97,680.00	\$97,680.00	2016	8/23/2016	3	SS07164C027	0	SMALL BUSINESS
TELFORD TYLER JANET	MEDICAL CONSULTANT SERVICES - MENTAL CASES CLOSELY ASSOCIATED TO INHERENTLY GOVERNMENTAL FUNCTION IGF::CL::IGF	\$97,591.90	\$97,591.90	2015	3/3/2015	11	SS041140070	1	SMALL BUSINESS
MAPLEWOOD PSYCHOLOGICAL ASSOCIATES	IGF::CL::IGF REGION 3 RMC CALL ORDER 0003 FOR CASE	\$97,579.12	\$97,579.12	2016	7/18/2016	3	SS03154C005	0	SMALL BUSINESS
DISTEFANO, ESPERANZA J.	VE EXPRESS REPORTING IGF::CT::IGF	\$97,536.00	\$97,536.00	2015	9/30/2015	2015	SS10251120035	0	SMALL BUSINESS
WELLS, ASHELEY	VE EXPRESS REPORTING IGF::CT::IGF	\$97,445.48	\$97,445.48	2015	9/30/2015	2015	SS10381130189	0	SMALL BUSINESS
ANTHONY VINCENT MELANSON	VE EXPRESS REPORTING IGF::CT::IGF	\$97,439.96	\$97,439.96	2015	9/30/2015	2015	SS10381130057	0	SMALL BUSINESS
WEBZ INZ	VE EXPRESS REPORTING IGF::CT::IGF	\$97,385.00	\$97,385.00	2015	9/30/2015	2015	SS10381130097	0	SMALL BUSINESS
JANICE HASTERT	VE EXPRESS REPORTING IGF::CT::IGF	\$97,337.00	\$97,337.00	2015	9/30/2015	2015	SS10691170019	0	SMALL BUSINESS
KENDRICK MD, RONALD E	ME EXPRESS REPORTING - MENTAL HEALTH IGF::CT::IGF	\$97,330.00	\$97,330.00	2015	9/30/2015	2015	SS10631150134	0	SMALL BUSINESS
CHARLES H MCBEE ASSOCIATES	ME EXPRESS REPORTING - MENTAL HEALTH IGF::CT::IGF	\$97,297.45	\$97,297.45	2015	9/30/2015	2015	SS10631150327	0	SMALL BUSINESS
BUBAN MARY EILEEN PSYD	ME EXPRESS REPORTING - MENTAL HEALTH IGF::CT::IGF	\$97,132.17	\$97,132.17	2015	9/30/2015	2015	SS10631150026	0	SMALL BUSINESS
CARROZZA-ROTH, CHRISTINE	VE EXPRESS REPORTING IGF::CT::IGF	\$97,117.00	\$97,117.00	2015	9/30/2015	2015	SS10381130093	0	SMALL BUSINESS
WALLS, PHILIP D MD	IGF::CL::IGF OMA MEDICAL CONSULTANTS. REVIEWS BY MEDICAL CONSULTANT OF DISABILITY CLAIM CASE FILES FOR AGENCY DISABILITY PROGRAM.	\$96,925.00	\$96,925.00	2016	5/25/2016	1	SS00164C050	0	SMALL BUSINESS
ROLON-RIVERA, DR JOSE E	ME EXPRESS REPORTING - MENTAL HEALTH IGF::CT::IGF	\$96,790.00	\$96,790.00	2015	9/30/2015	2015	SS10251120082	0	OTHER THAN SMALL BUSINESS
IRON DATA SOLUTIONS, INC. (DE)	RENEWAL OF MAINTENANCE ON IRON DATA SOFTWARE	\$96,532.98	\$96,532.98	2016	10/29/2015	SS001650017		0	OTHER THAN SMALL BUSINESS

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Vendor Name	Description of Requirement	Action Obligation	Base and All Options Value	Fiscal Year	Date Signed	PO/Delivery Order/Task Order/Call#	Parent Contract	Mod #	Contracting Officers Business Size Selection
DALTON, CHARLES B	IGF::CL::IGF REGION 2 MEDICAL CONSULTANTS. REVIEWS BY MEDICAL CONSULTANT OF DISABILITY CLAIM CASE FILES FOR AGENCY DISABILITY PROGRAM. MODIFICATION TO INCREASE QUANTITY, EXTEND PERFORMANCE, AND CHANGE ADDRESS.	\$96,504.00	\$96,504.00	2015	4/9/2015	13	SS021040025	1	SMALL BUSINESS
CAPORALE, ANDREW VOCATIONAL CONSULTING	VE EXPRESS REPORTING IGF::CT::IGF	\$96,494.67	\$96,494.67	2015	9/30/2015	2015	SS10381130129	0	SMALL BUSINESS
ARCEGA, NATHANIEL DR MD	IGF::CL::IGF ARCEGA, MC, REG 10 INDEPENDENT CASE REVIEWS	\$96,489.90	\$96,489.90	2015	4/8/2015	2	SS10154C002	0	SMALL BUSINESS
JAMES M FULLER	ME EXPRESS REPORTING - MENTAL HEALTH IGF::CT::IGF	\$96,343.00	\$96,343.00	2015	9/30/2015	2015	SS10631150089	0	SMALL BUSINESS
ROBERT JACKSON	VE EXPRESS REPORTING IGF::CT::IGF	\$96,173.65	\$96,173.65	2015	9/30/2015	2015	SS10381130161	0	SMALL BUSINESS
FITZPATRICK, LISA	IGF::CL::IGF - SS01-16-4C008 FITZPATRICK, LISA CALL OR	\$96,168.00	\$96,168.00	2016	2/13/2016	1	SS01164C008	0	SMALL BUSINESS
LAMPLEY, MATTHEW CHARLES	ME EXPRESS REPORTING - MENTAL HEALTH IGF::CT::IGF	\$96,140.00	\$96,140.00	2015	9/30/2015	2015	SS10631150365	0	SMALL BUSINESS
ANDREW M STEINER MD	ME EXPRESS REPORTING - MENTAL HEALTH IGF::CT::IGF	\$96,000.00	\$96,000.00	2015	9/30/2015	2015	SS10881190026	0	SMALL BUSINESS
MICROSOFT CORPORATION SITZ IN REDMOND CORPORATION	IGF::CT::IGF TASK ORDER 26 FOR MICROSOFT SYSTEM C	\$95,823.00	\$95,823.00	2016	6/29/2016	26	SS001360014	0	OTHER THAN SMALL BUSINESS
MICHAEL JR, ANTHONY T	VE EXPRESS REPORTING IGF::CT::IGF	\$95,806.22	\$95,806.22	2015	9/30/2015	2015	SS10381130075	0	SMALL BUSINESS
HERMAN MILLER, INC.	ROCKINGHAM, NC C342 DESIGN, PRODUCT AND INSTALL	\$95,734.35	\$95,734.35	2016	5/2/2016	SS001630347	SS001260003	0	OTHER THAN SMALL BUSINESS
CALANDRA, EDMOND	VE EXPRESS REPORTING IGF::CT::IGF	\$95,565.00	\$95,565.00	2015	9/30/2015	2015	SS11501110003	0	SMALL BUSINESS
TECHFIRST, INC.	IGF::CT::IGF SIGN LANGUAGE INTERPRETER SERVICES NE	\$95,443.20	\$95,443.20	2016	7/18/2016	SS001650200		0	SMALL BUSINESS
MALIK & ASSOCIATES	ME EXPRESS REPORTING - MENTAL HEALTH IGF::CT::IGF	\$95,256.40	\$95,256.40	2015	9/30/2015	2015	SS10631150363	0	SMALL BUSINESS
HERNANDEZ DENTON, JORGE	ME EXPRESS REPORTING - MENTAL HEALTH IGF::CT::IGF	\$95,170.00	\$95,170.00	2015	9/30/2015	2015	SS10251120020	0	SMALL BUSINESS
GROUP 5 CONSULTING	VE EXPRESS REPORTING IGF::CT::IGF	\$94,957.71	\$94,957.71	2015	9/30/2015	2015	SS11521100039	0	SMALL BUSINESS
BROWN, ADGER	VE EXPRESS REPORTING IGF::CT::IGF	\$94,767.66	\$94,767.66	2015	9/30/2015	2015	SS10541140193	0	SMALL BUSINESS
HARVEY, WILLIAM R	VE EXPRESS REPORTING IGF::CT::IGF	\$94,675.00	\$94,675.00	2015	9/30/2015	2015	SS10541140385	0	SMALL BUSINESS
DANIEL W HAMILL PSYCHOLOGIST	ME EXPRESS REPORTING - MENTAL HEALTH IGF::CT::IGF	\$94,607.96	\$94,607.96	2015	9/30/2015	2015	SS10781160084	0	SMALL BUSINESS
REGROUP REHAB, INC.	VE EXPRESS REPORTING IGF::CT::IGF	\$94,176.09	\$94,176.09	2015	9/30/2015	2015	SS10541140625	0	SMALL BUSINESS
BUBAN MARY EILEEN PSYD	ME EXPRESS REPORTING - MENTAL HEALTH IGF::CT::IGF	\$93,952.00	\$93,952.00	2015	9/30/2015	20151	SS10631150026	0	SMALL BUSINESS
JAH REHABILITATION, L.L.C.	VE EXPRESS REPORTING IGF::CT::IGF	\$93,829.00	\$93,829.00	2015	9/30/2015	2015	SS10781160077	0	SMALL BUSINESS
CRAWFORD, TERRI	VE EXPRESS REPORTING IGF::CT::IGF	\$93,767.00	\$93,767.00	2015	9/30/2015	2015	SS10691170049	0	SMALL BUSINESS
ALKALINE CONSULTING LLC	ME EXPRESS REPORTING - MENTAL HEALTH IGF::CT::IGF	\$93,745.96	\$93,745.96	2015	9/30/2015	2015	SS10631150359	0	SMALL BUSINESS
CRC SERVICES, LLC	VE EXPRESS REPORTING IGF::CT::IGF	\$93,726.00	\$93,726.00	2015	9/30/2015	2015	SS11501110005	0	SMALL BUSINESS
STRAHL MD, NATHAN ROBERT	ME EXPRESS REPORTING - MENTAL HEALTH IGF::CT::IGF	\$93,630.00	\$93,630.00	2015	9/30/2015	2015	SS10541140042	0	SMALL BUSINESS
BRONSTEIN MD, HOWARD D.	IGF::CL::IGF OMA MEDICAL CONSULTANTS. REVIEWS BY MEDICAL CONSULTANT OF DISABILITY CLAIM CASE FILES FOR AGENCY DISABILITY PROGRAM.	\$93,525.00	\$93,525.00	2016	5/27/2016	1	SS00164C005	0	SMALL BUSINESS
ROBERT G PIPER	VE EXPRESS REPORTING IGF::CT::IGF	\$93,476.00	\$93,476.00	2015	9/30/2015	2015	SS10541140537	0	SMALL BUSINESS
WARD, BONNIE M	VE EXPRESS REPORTING IGF::CT::IGF	\$93,320.38	\$93,320.38	2015	9/30/2015	2015	SS10781160275	0	SMALL BUSINESS
KIZER, DIANA L	VE EXPRESS REPORTING IGF::CT::IGF	\$93,282.27	\$93,282.27	2015	9/30/2015	2015	SS10781560003	0	SMALL BUSINESS
HEALTH RESEARCH, INC.	IGF::CL::IGF CLOSELY ASSOCIATED REQUEST FUNDING F	\$93,280.00	\$93,280.00	2016	12/22/2015	5	SS001260051	0	OTHER THAN SMALL BUSINESS
JOHN BARTOW BLACK CONSULTING	VE EXPRESS REPORTING IGF::CT::IGF	\$93,274.93	\$93,274.93	2015	9/30/2015	2015	SS10541140337	0	SMALL BUSINESS
GREEN, PAT	VE EXPRESS REPORTING IGF::CT::IGF	\$93,268.00	\$93,268.00	2015	9/30/2015	2015	SS10251120023	0	SMALL BUSINESS

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	IGF::OT::IGF  THE SOCIAL SECURITY ADMINISTRATION (SSA) HAS A REQUIREMENT FOR CONTRACTOR SERVICES TO SUPPORT OUR AUTOMATED DATA PROCESSING CAPABILITIES AT CLAIMS-TAKING FOREIGN SERVICE POSTS (FSP) SITES.  JUSTIFICATION: THESE SERVICES ARE REQUIRED TO PROVIDE SUPPORT FOR RELOCATIONS (CURRENT BUILDING LOCATION TO ANOTHER BUILDING LOCATION), INSTALLATIONS AND UPGRADES OF INTELLIGENT WORKSTATIONS (IWS) AND LOCAL AREA NETWORK (LAN) COMPONENTS IN VARIOUS FSP SITES. THE SERVICES PROVIDES FOR THE COMPLETE INSTALLATION OF NEW FSP SITES AND TECHNOLOGY REFRESHMENTS AT EXISTING SITES. THE PROJECT WILL BE MULTI-PHASED IN NATURE AND WILL REQUIRE SITE VISITS, INSTALLATION, TRAINING, SHIPPING, AND PROJECT MANAGEMENT.								
BOWHEAD PROFESSIONAL SOLUTIONS, LLC		\$93,074.72	\$93,074.72	2015	12/8/2014	SS001530142	SS001461008	0	SMALL BUSINESS
ALIFF, MICHELLE M	ME EXPRESS REPORTING - MENTAL HEALTH IGF::CT::IGF	\$93,070.72	\$93,070.72	2015	9/30/2015	2015	SS10781360025	0	SMALL BUSINESS
VICTORIA REI	VE EXPRESS REPORTING IGF::CT::IGF	\$93,054.00	\$93,054.00	2015	9/30/2015	2015	SS10881190179	0	SMALL BUSINESS
DINGESS, WILLIAM S	ME EXPRESS REPORTING - MENTAL HEALTH IGF::CT::IGF	\$93,013.73	\$93,013.73	2015	9/30/2015	2015	SS10631150223	0	SMALL BUSINESS
RENEE SMITH & ASSOCIATES, INC.	VE EXPRESS REPORTING IGF::CT::IGF	\$92,966.77	\$92,966.77	2015	9/30/2015	2015	SS10541140535	0	SMALL BUSINESS
TRUESDALE WENKMAN & ASSOCIATES	ME EXPRESS REPORTING - MENTAL HEALTH IGF::CT::IGF	\$92,951.75	\$92,951.75	2015	9/30/2015	2015	SS10631150357	0	SMALL BUSINESS
JAMES M BROOKS	ME EXPRESS REPORTING - MENTAL HEALTH IGF::CT::IGF	\$92,780.00	\$92,780.00	2015	9/30/2015	2015	SS10631150024	0	SMALL BUSINESS
BARNES, STEPHANIE	VE EXPRESS REPORTING IGF::CT::IGF	\$92,717.37	\$92,717.37	2015	9/30/2015	2015	SS10541140531	0	OTHER THAN SMALL BUSINESS
	IGF::CL::IGF SS01-16-4C029 TURNER, MARIE CALL ORDER FOR 1100 INDEPENDENT DISABILITY CASE REVIEWS AND 50 HOURS TO ESTABLISH A CALL ORDER FOR THE PERIOD OF PERFORMANCE 04/01/2016 - 03/31/2017. THE RATE OF PAY IS \$80.14 PER CASE AND \$90.57 PER HOUR FOR TOTAL FUNDING OF \$92,682.50.	\$92,682.50	\$92,682.50	2016	2/17/2016	1	SS01164C029	0	SMALL BUSINESS
PEREGRINE CONSULTING LLC	ME EXPRESS REPORTING - MENTAL HEALTH IGF::CT::IGF	\$92,584.95	\$92,584.95	2015	9/30/2015	2015	SS10631150321	0	SMALL BUSINESS
WEISS, HILLARY	IGF::CL::IGF MODIFICATION TO ADD CASES AND EXTEND	\$92,574.00	\$92,574.00	2016	8/2/2016	1	SS09164C016	1	SMALL BUSINESS
MARY JESKO AND ASSOCIATES	VE EXPRESS REPORTING IGF::CT::IGF	\$92,454.00	\$92,454.00	2015	9/30/2015	2015	SS10881190089	0	SMALL BUSINESS
HUGHES, NANCY	VE EXPRESS REPORTING IGF::CT::IGF	\$92,423.38	\$92,423.38	2015	9/30/2015	2015	SS10541140219	0	SMALL BUSINESS
JAHNKE, LYNNE	ME EXPRESS REPORTING - MENTAL HEALTH IGF::CT::IGF	\$92,400.00	\$92,400.00	2015	9/30/2015	2015	SS10881390004	0	SMALL BUSINESS
VISTA CONSULTING SERVICES, INC	VE EXPRESS REPORTING IGF::CT::IGF	\$92,294.81	\$92,294.81	2015	9/30/2015	2015	SS11521100019	0	SMALL BUSINESS
SALEK, JEANNINE	VE EXPRESS REPORTING IGF::CT::IGF	\$92,261.42	\$92,261.42	2015	9/30/2015	2015	SS10541140157	0	SMALL BUSINESS
MARRACCO, MARIAN R	VE EXPRESS REPORTING IGF::CT::IGF	\$92,233.00	\$92,233.00	2015	9/30/2015	2015	SS10251220004	0	SMALL BUSINESS
LEE KNUTSON	ME EXPRESS REPORTING - MENTAL HEALTH IGF::CT::IGF	\$92,143.00	\$92,143.00	2015	9/30/2015	2015	SS10631150399	0	SMALL BUSINESS
	IGF::CL::IGF  REGION 9 MEDICAL CONSULTANTS. REVIEWS BY MEDICAL CONSULTANT OF DISABILITY CLAIM CASE FILES FOR AGENCY DISABILITY PROGRAM. CALL ORDER TO AWARD TIMOTHY SCHUMACHER 1,100 CASES AND 4 NON-CASE HOURS.	\$92,126.52	\$92,126.52	2016	2/29/2016	1	SS09164C058	0	SMALL BUSINESS
SCHUMACHER, TIMOTHY G									
HALPERIN MD, EDWARD N	ME EXPRESS REPORTING - MENTAL HEALTH IGF::CT::IGF	\$92,120.00	\$92,120.00	2015	9/30/2015	2015	SS10251120012	0	SMALL BUSINESS
COUGHLIN, CARLY N	VE EXPRESS REPORTING IGF::CT::IGF	\$92,051.00	\$92,051.00	2015	9/30/2015	2015	SS10881190261	0	SMALL BUSINESS
SHARON SPAVENTA	VE EXPRESS REPORTING IGF::CT::IGF	\$91,990.00	\$91,990.00	2015	9/30/2015	2015	SS10881190097	0	SMALL BUSINESS
GERALD D BELCHICK	VE EXPRESS REPORTING IGF::CT::IGF	\$91,811.00	\$91,811.00	2015	9/30/2015	2015	SS10881190221	0	SMALL BUSINESS
VOCATIONAL FOUNDATION	VE EXPRESS REPORTING IGF::CT::IGF	\$91,729.00	\$91,729.00	2015	9/30/2015	2015	SS10781160151	0	SMALL BUSINESS
NAJARIAN COUNSELING SERVICES INC	VE EXPRESS REPORTING IGF::CT::IGF	\$91,716.00	\$91,716.00	2015	9/30/2015	2015	SS10881190131	0	SMALL BUSINESS

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PUBLIC HEALTH AND ENVIRONMENT, COLORADO DEPARTMENT OF TONJA HUBACKER	IGF::CL::IGF CLOSELY ASSOCIATED CO-SS00-12-60016 ELECTRONIC DEATH REGISTRATION DELIVERY ORDER. 24750 EDR RECORDS AT \$3.17 PER RECORD AND 8250 EDR RECORDS AT \$1.59 PER RECORD. TOTAL DELIVERY ORDER \$91575. PERIOD OF PERFORMANCE 1/01/2016 - 12/31/2016.	\$91,575.00	\$91,575.00	2016	12/22/2015	5	SS001260016	0	OTHER THAN SMALL BUSINESS
ALLISON VOCATIONAL EVALUATORS	VE EXPRESS REPORTING IGF::CT::IGF	\$91,567.00	\$91,567.00	2015	9/30/2015	2015	SS10381130217	0	SMALL BUSINESS
DOLAN, PAUL R MA	VE EXPRESS REPORTING IGF::CT::IGF	\$91,448.00	\$91,448.00	2015	9/30/2015	2015	SS10881190253	0	SMALL BUSINESS
FISHER, RICHARD	VE EXPRESS REPORTING IGF::CT::IGF	\$91,326.95	\$91,326.95	2015	9/30/2015	2015	SS10541140461	0	SMALL BUSINESS
	ME EXPRESS REPORTING - MENTAL HEALTH IGF::CT::IGF	\$91,324.05	\$91,324.05	2015	9/30/2015	2015	SS10631150087	0	SMALL BUSINESS
HEALTH RESEARCH, INC.	IGF::OT::IGF OTHER FUNCTIONS NY STATE RECEIPT OF NON-ELECTRONIC DEATH RECORDS FOR OPTION YEAR III PERIOD OF PERFORMANCE JANUARY 1, 2015 - DECEMBER 31, 2015.	\$91,160.00	\$91,160.00	2015	12/22/2014	4	SS001260051	0	OTHER THAN SMALL BUSINESS
JUSINO-BERRIOS, CARLOS M	IGF::CL::IGF THE PURPOSE OF THIS MODIFICATION IS TO INCREASE CASE REVIEWS AND EXTEND THE PERIOD OF PERFORMANCE.	\$91,124.00	\$91,124.00	2016	6/7/2016	1	SS02164C012	2	SMALL BUSINESS
THOMAS J MAXWELL MD	ME EXPRESS REPORTING - MENTAL HEALTH IGF::CT::IGF	\$91,120.00	\$91,120.00	2015	9/30/2015	2015	SS10881190064	0	SMALL BUSINESS
MARNAN, HOWARD INC	VE EXPRESS REPORTING IGF::CT::IGF	\$90,940.00	\$90,940.00	2015	9/30/2015	2015	SS10781160173	0	SMALL BUSINESS
LEV PHD, JULIAN	IGF::CL::IGF LEV - CALL ORDER - CASES	\$90,780.00	\$90,780.00	2015	5/21/2015	15	SS061140034	0	SMALL BUSINESS
TOTAL VOCATIONAL SERVICE INC	VE EXPRESS REPORTING IGF::CT::IGF	\$90,747.00	\$90,747.00	2015	9/30/2015	2015	SS11521100101	0	SMALL BUSINESS
MAXIM, WARREN	VE EXPRESS REPORTING IGF::CT::IGF	\$90,612.76	\$90,612.76	2015	9/30/2015	2015	SS11501110023	0	SMALL BUSINESS
J. L. WILSON ASSOCIATES, INC.	VE EXPRESS REPORTING IGF::CT::IGF	\$90,340.00	\$90,340.00	2015	9/30/2015	2015	SS10251120071	0	SMALL BUSINESS
BARRY S HENSLEY DR	VE EXPRESS REPORTING IGF::CT::IGF	\$90,302.58	\$90,302.58	2015	9/30/2015	2015	SS10381130061	0	SMALL BUSINESS
NORTH PARK STOMACH CLINIC, LTD.	ME EXPRESS REPORTING - MENTAL HEALTH IGF::CT::IGF	\$90,223.00	\$90,223.00	2015	9/30/2015	2015	SS10631150088	0	SMALL BUSINESS
LINA B CALDWELL, MD	MEDICAL CONTRACTING SERVICES - PHYSICAL CASES CLOSELY ASSOCIATED TO INHERENTLY GOVERNMENTAL FUNCTION IGF::CL::IGF	\$90,211.00	\$90,211.00	2015	6/23/2015	18	SS041140039	1	SMALL BUSINESS
ROWZIE MS, HARRS N	VE EXPRESS REPORTING IGF::CT::IGF	\$90,194.53	\$90,194.53	2015	9/30/2015	2015	SS10781160319	0	SMALL BUSINESS
COWEN, PATRICIA A	VE EXPRESS REPORTING IGF::CT::IGF	\$89,907.83	\$89,907.83	2015	9/30/2015	2015	SS10781160125	0	SMALL BUSINESS
KATHARINE BRADFORD	VE EXPRESS REPORTING IGF::CT::IGF	\$89,875.80	\$89,875.80	2015	9/30/2015	2015	SS10541140543	0	SMALL BUSINESS
CAMPION MD, ROBERT	IGF::CL::IGF REGION 2 MEDICAL CONSULTANTS. REVIEWS BY MEDICAL CONSULTANT OF DISABILITY CLAIM CASE FILES FOR AGENCY DISABILITY PROGRAM.	\$89,782.00	\$89,782.00	2015	2/20/2015	8	SS021140072	0	SMALL BUSINESS
ROBERT STARACE DR	IGF::CL::IGF REGION 2 MEDICAL CONSULTANTS. REVIEWS BY MEDICAL CONSULTANT OF DISABILITY CLAIM CASE FILES FOR AGENCY DISABILITY PROGRAM. MODIFICATION TO INCREASE QUANTITY AND EXTEND PERFORMANCE.	\$89,782.00	\$89,782.00	2015	6/12/2015	10	SS021140107	1	SMALL BUSINESS
MURPHY MD PA, CHARLES M.	IGF::CL::IGF MURPHY - CALL ORDER - CASES	\$89,760.00	\$89,760.00	2015	8/28/2015	2	SS061440033	0	SMALL BUSINESS
VOC SERVICES INC	VE EXPRESS REPORTING IGF::CT::IGF	\$89,741.00	\$89,741.00	2015	9/30/2015	2015	SS10781160263	0	SMALL BUSINESS
DEBRA J HORTON	VE EXPRESS REPORTING IGF::CT::IGF	\$89,737.11	\$89,737.11	2015	9/30/2015	2015	SS10541140149	0	SMALL BUSINESS
VOCATIONAL DIRECTIONS, INC.	VE EXPRESS REPORTING IGF::CT::IGF	\$89,639.00	\$89,639.00	2015	9/30/2015	2015	SS11501110083	0	SMALL BUSINESS
NETWORK REHABILITATION SERVICES, INC.	VE EXPRESS REPORTING IGF::CT::IGF	\$89,593.56	\$89,593.56	2015	9/30/2015	2015	SS10541140293	0	SMALL BUSINESS
IBAIRA, DR GUILLERMO R	IGF::CL::IGF CLOSELY ASSOCIATED - CALL ORDER FOR IT	\$89,540.00	\$89,540.00	2016	8/19/2016	6	SS07164C001	0	SMALL BUSINESS
CAREERS4U	VE EXPRESS REPORTING IGF::CT::IGF	\$89,368.00	\$89,368.00	2015	9/30/2015	2015	SS10541140697	0	OTHER THAN SMALL BUSINESS
BUSTIN, SHERYL L	VE EXPRESS REPORTING IGF::CT::IGF	\$89,116.05	\$89,116.05	2015	9/30/2015	2015	SS10381130133	0	SMALL BUSINESS
JOSEPH C HOROZANIECKI MD	ME EXPRESS REPORTING - MENTAL HEALTH IGF::CT::IGF	\$89,060.00	\$89,060.00	2015	9/30/2015	2015	SS10631150086	0	SMALL BUSINESS
JOSEPH M CARVER PHD	ME EXPRESS REPORTING - MENTAL HEALTH IGF::CT::IGF	\$88,825.98	\$88,825.98	2015	9/30/2015	2015	SS10631150034	0	SMALL BUSINESS
GREEN, WILLIAM F	VE EXPRESS REPORTING IGF::CT::IGF	\$88,740.19	\$88,740.19	2015	9/30/2015	2015	SS10541140415	0	SMALL BUSINESS
MICHAEL CREMERIUS PHD	ME EXPRESS REPORTING - MENTAL HEALTH IGF::CT::IGF	\$88,700.00	\$88,700.00	2015	9/30/2015	2015	SS10631150044	0	SMALL BUSINESS

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TOP HAND INC	VE EXPRESS REPORTING IGF::CT::IGF	\$88,669.22	\$88,669.22	2015	9/30/2015	2015	SS10781160213	0	SMALL BUSINESS
CHOPRA, MD, ARVIND	IGF::CL::IGF REGION 2 MEDICAL CONSULTANTS. REVIEWS BY MEDICAL CONSULTANT OF DISABILITY CLAIM CASE FILES FOR AGENCY DISABILITY PROGRAM.	\$88,462.00	\$88,462.00	2015	2/20/2015	9	SS021040027	1	SMALL BUSINESS
HOLMES, MICHELLE D	IGF::CL::IGF - SS01-15-4C000 - HOLMES, MICHELLE - CALL	\$88,451.00	\$88,451.00	2016	2/16/2016	3	SS01154C000	0	SMALL BUSINESS
NORTH PARK STOMACH CLINIC, LTD.	ME EXPRESS REPORTING - MENTAL HEALTH IGF::CT::IGF	\$88,217.00	\$88,217.00	2015	9/30/2015	20151	SS10631150088	0	SMALL BUSINESS
DISABILITY CONSULTANTS, LLC	MEDICAL CONTRACTOR SERVICES - MENTAL CASES CLOSELY ASSOCIATED TO INHERENTLY GOVERNMENTAL FUNCTION IGF::CL::IGF	\$88,160.75	\$88,160.75	2015	2/4/2015	34	SS041140025	1	SMALL BUSINESS
EFFECTIVE REHABILITATION MANAGEMENT INC	ME EXPRESS REPORTING - MENTAL HEALTH IGF::CT::IGF	\$88,031.00	\$88,031.00	2015	9/30/2015	2015	SS10631150311	0	SMALL BUSINESS
BROOKS, SUSAN	VE EXPRESS REPORTING IGF::CT::IGF	\$88,014.21	\$88,014.21	2015	9/30/2015	2015	SS10781160269	0	SMALL BUSINESS
THOMAS R IRONS	VE EXPRESS REPORTING IGF::CT::IGF	\$87,823.85	\$87,823.85	2015	9/30/2015	2015	SS10781160165	0	SMALL BUSINESS
CAREER DEVELOPMENT, INC	VE EXPRESS REPORTING IGF::CT::IGF	\$87,778.00	\$87,778.00	2015	9/30/2015	2015	SS10881190225	0	SMALL BUSINESS
OFFICE OF MICHAEL J KIBLER	VE EXPRESS REPORTING IGF::CT::IGF	\$87,572.00	\$87,572.00	2015	9/30/2015	2015	SS10381130137	0	SMALL BUSINESS
ROBERT H SMILEY M.D.	ME EXPRESS REPORTING - MENTAL HEALTH IGF::CT::IGF	\$87,530.00	\$87,530.00	2015	9/30/2015	2015	SS10781160026	0	SMALL BUSINESS
RSI CORP	RENEWAL OF MAINTENANCE FOR RSI CORP BUFFER POO	\$87,499.99	\$87,499.99	2016	10/29/2015	SS001650019		0	OTHER THAN SMALL BUSINESS
ASCENDANT CONSULTING, INC.	VE EXPRESS REPORTING IGF::CT::IGF	\$87,452.05	\$87,452.05	2015	9/30/2015	2015	SS10541140373	0	SMALL BUSINESS
KAY SQUIRES GILREATH, VOCATIONAL CONSULTANT, INC	VE EXPRESS REPORTING IGF::CT::IGF	\$87,390.00	\$87,390.00	2015	9/30/2015	2015	SS10781160067	0	SMALL BUSINESS
LANGFORD-HETRICK, RANDI	VE EXPRESS REPORTING IGF::CT::IGF	\$87,344.00	\$87,344.00	2015	9/30/2015	2015	SS10881190227	0	SMALL BUSINESS
SAWYER DISABILITY MANAGMENT CONSULTING	VE EXPRESS REPORTING IGF::CT::IGF	\$87,336.02	\$87,336.02	2015	9/30/2015	2015	SS10541140145	0	SMALL BUSINESS
SWISHER, CHERYL L.	VE EXPRESS REPORTING IGF::CT::IGF	\$87,270.00	\$87,270.00	2015	9/30/2015	2015	SS10781160049	0	SMALL BUSINESS
COUNSELING RESOURCE CENTER, INC	ME EXPRESS REPORTING - MENTAL HEALTH IGF::CT::IGF	\$87,202.41	\$87,202.41	2015	9/30/2015	2015	SS10631150295	0	OTHER THAN SMALL BUSINESS
DONNA BARDSLEY	VE EXPRESS REPORTING IGF::CT::IGF	\$87,164.00	\$87,164.00	2015	9/30/2015	2015	SS10541140329	0	SMALL BUSINESS
JAMES R BUSKIRK MD	IGF::CL::IGF BUSKIRK, MC, REGION 10 ADDITION AND FUNDING OF INDEPENDENT CASE REVIEWS	\$87,120.00	\$87,120.00	2016	2/1/2016	3	SS10154C005	0	SMALL BUSINESS
COUNSELING RESOURCE CENTER, INC	ME EXPRESS REPORTING - MENTAL HEALTH IGF::CT::IGF	\$87,002.00	\$87,002.00	2015	9/30/2015	20151	SS10631150295	0	OTHER THAN SMALL BUSINESS
MARIE T TURNER DR	RMC - CASE REVIEWS IGF::CL::IGF CLOSELY ASSOCIATED	\$86,977.00	\$86,977.00	2015	3/26/2015	10	SS011140013	0	SMALL BUSINESS
SAMUEL E EDELMANN	VE EXPRESS REPORTING IGF::CT::IGF	\$86,940.00	\$86,940.00	2015	9/30/2015	2015	SS10381130091	0	SMALL BUSINESS
PASCULLI, DALE	VE EXPRESS REPORTING IGF::CT::IGF	\$86,894.00	\$86,894.00	2015	9/30/2015	2015	SS10251520003	0	SMALL BUSINESS
CAREER CONSULTANT	ME EXPRESS REPORTING - MENTAL HEALTH IGF::CT::IGF	\$86,791.26	\$86,791.26	2015	9/30/2015	2015	SS10631150129	0	SMALL BUSINESS
JOHNSTON, BEJAMIN	VE EXPRESS REPORTING IGF::CT::IGF	\$86,636.50	\$86,636.50	2015	9/30/2015	2015	SS10541140313	0	SMALL BUSINESS
ROBERT N STRADER	VE EXPRESS REPORTING IGF::CT::IGF	\$86,481.78	\$86,481.78	2015	9/30/2015	2015	SS10541140173	0	SMALL BUSINESS
ABRAHAM, CARMINE	VE EXPRESS REPORTING IGF::CT::IGF	\$86,456.00	\$86,456.00	2015	9/30/2015	2015	SS10381130079	0	SMALL BUSINESS
HERMAN MILLER, INC.	LAS VEGAS, NV (ODAR) SX71 DESIGN, PRODUCT AND REL	\$86,344.64	\$86,344.64	2015	1/6/2015	SS001530196	SS001260003	0	OTHER THAN SMALL BUSINESS
MICHAEL L. STINSON, M.A., C.R.C., INC.	VE EXPRESS REPORTING IGF::CT::IGF	\$86,098.55	\$86,098.55	2015	9/30/2015	2015	SS10881190043	0	SMALL BUSINESS
JANE COLVIN-ROBERSON	VE EXPRESS REPORTING IGF::CT::IGF	\$86,089.69	\$86,089.69	2015	9/30/2015	2015	SS10541140201	0	SMALL BUSINESS
ARKANSAS DEPARTMENT OF HEALTH	IGF::CL::IGF CLOSELY ASSOCIATED AR-SS00-12-60015 ELECTRONIC DEATH REGISTRATION DELIVERY ORDER. 23250 EDR RECORDS AT \$3.17 PER RECORD AND 7750 EDR RECORDS AT \$1.59 PER RECORD. TOTAL DELIVERY ORDER \$86,025. PERIOD OF PERFORMANCE 1/01/2016 - 12/31/2016.	\$86,025.00	\$86,025.00	2016	12/22/2015	5	SS001260015	0	OTHER THAN SMALL BUSINESS
PUBLIC HEALTH, IOWA DEPARTMENT OF	IGF::CL::IGF CLOSELY ASSOCIATED IA SS00-12-60041 ELECTRONIC DEATH REGISTRATION DELIVERY ORDER. 31,000 EDR RECORDS TOTAL DELIVERY ORDER \$86,025.00. PERIOD OF PERFORMANCE 1/01/2016 - 12/31/2016.	\$86,025.00	\$86,025.00	2016	12/22/2015	5	SS001260041	0	OTHER THAN SMALL BUSINESS
DOERING, STELLA J	VE EXPRESS REPORTING IGF::CT::IGF	\$86,021.00	\$86,021.00	2015	9/30/2015	2015	SS10691170089	0	SMALL BUSINESS
MICHAEL L. STINSON, M.A., C.R.C., INC.	VE EXPRESS REPORTING IGF::CT::IGF	\$86,005.00	\$86,005.00	2015	9/30/2015	20151	SS10881190043	0	SMALL BUSINESS
DR MINH VUDINH	VE EXPRESS REPORTING IGF::CT::IGF	\$85,870.00	\$85,870.00	2015	9/30/2015	2015	SS10881190070	0	SMALL BUSINESS
STEINBERG, HOWARD	VE EXPRESS REPORTING IGF::CT::IGF	\$85,596.00	\$85,596.00	2015	9/30/2015	2015	SS11501110067	0	SMALL BUSINESS
MARK HARRINGTON & ASSOCIATES, INC.	VE EXPRESS REPORTING IGF::CT::IGF	\$85,072.75	\$85,072.75	2015	9/30/2015	2015	SS11521100011	0	SMALL BUSINESS
GREENBERG, JOEL	VE EXPRESS REPORTING IGF::CT::IGF	\$85,050.00	\$85,050.00	2015	9/30/2015	2015	SS10881190169	0	SMALL BUSINESS

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Vendor Name	Description of Requirement	Action Obligation	Base and All Options Value	Fiscal Year	Date Signed	PO/Delivery Order/Task Order/Call#	Parent Contract	Mod #	Contracting Officers Business Size Selection
NATIONAL GRID USA SERVICE COMPANY, INC.	IGF::CT::IGF GAS UTILITY SERVICE TO THE ADDABBO BUILDING, 155-10 JAMAICA AVE, JAMAICA NY 11432 FROM 08/01/2015 TO 07/31/2016.	\$85,000.00	\$85,000.00	2015	7/27/2015	SS021530007	GS00P12BSD0879	0	OTHER THAN SMALL BUSINESS
COUNSELING CENTER TUPELO LLP	VE EXPRESS REPORTING IGF::CT::IGF	\$84,850.48	\$84,850.48	2015	9/30/2015	2015	SS10541140345	0	SMALL BUSINESS
SHAH, TEJU	IGF::CL::IGF S S01-16-4C028 SHAH, TEJASWINI CALL ORDER FOR 1000 INDEPENDENT DISABILITY CASE REVIEWS AND 50 HOURS TO ESTABLISH A CALL ORDER FOR THE PERIOD 04/01/2016 - 03/31/2017. THE RATE OF PAY IS \$80.14 PER CASE AND \$90.57 PER HOUR FOR TOTAL FUNDING OF \$84,668.50.	\$84,668.50	\$84,668.50	2016	2/19/2016	1	SS01164C028	0	SMALL BUSINESS
BEADLES JR, ROBERT J	VE EXPRESS REPORTING IGF::CT::IGF	\$84,629.46	\$84,629.46	2015	9/30/2015	2015	SS10541140213	0	SMALL BUSINESS
MARCIA H SCHULMAN	VE EXPRESS REPORTING IGF::CT::IGF	\$84,616.24	\$84,616.24	2015	9/30/2015	2015	SS10541140331	0	SMALL BUSINESS
TERESA MANNING	VE EXPRESS REPORTING IGF::CT::IGF	\$84,544.00	\$84,544.00	2015	9/30/2015	2015	SS10541140471	0	SMALL BUSINESS
CLIFFORD VOCATIONAL SERVICES, INC	VE EXPRESS REPORTING IGF::CT::IGF	\$84,415.20	\$84,415.20	2015	9/30/2015	2015	SS10541140189	0	SMALL BUSINESS
SCOTT B SILVER & ASSOCIATES INC	ME EXPRESS REPORTING - MENTAL HEALTH IGF::CT::IGF	\$84,372.62	\$84,372.62	2015	9/30/2015	2015	SS10631150299	0	SMALL BUSINESS
ACHIEVE CONSULTING TEAM, INC.	VE EXPRESS REPORTING IGF::CT::IGF	\$84,318.00	\$84,318.00	2015	9/30/2015	2015	SS11521100023	0	SMALL BUSINESS
GARTMAN, MICHAEL F	VE EXPRESS REPORTING IGF::CT::IGF	\$84,312.85	\$84,312.85	2015	9/30/2015	2015	SS10781160265	0	SMALL BUSINESS
RICHMOND, CITY OF	CONTRACTOR SHALL PROVIDE SUPERVISION, LABOR, MATERIALS, AND NECESSARY EQUIPMENT TO MAINTAIN THE SEWER AND DRAIN SYSTEMS LOCATED AT THE SOCIAL SECURITY ADMINISTRATION'S FRANK HAGEL FEDERAL BUILDING, 1221 NEVIN AVE., RICHMOND, CA 94801-3123. IGF::CT::IGF	\$84,181.08	\$84,181.08	2017	11/17/2016	SS091751003		0	OTHER THAN SMALL BUSINESS
ZUKOWSKY, NORMAN	IGF::CL::IGF BLANKET PURCHASE AGREEMENTS FOR CONTRACTORS TO PROVIDE REGIONAL MEDICAL CONSULTANT SERVICES FOR THE SOCIAL SECURITY ADMINISTRATION. REVIEWS BY MEDICAL CONSULTANT OF DISABILITY CLAIM CASE FILES FOR AGENCY DISABILITY PROGRAM. MODIFICATION TO ADD CASES AND EXTEND THE PERIOD OF PERFORMANCE.	\$84,150.60	\$84,150.60	2016	7/31/2016	1	SS09164C057	1	SMALL BUSINESS
CLEM, ELIZEBETH	VE EXPRESS REPORTING IGF::CT::IGF	\$84,028.00	\$84,028.00	2015	9/30/2015	2015	SS10781160051	0	SMALL BUSINESS
GONZALEZ, JOSE	IGF::CL::IGF REGION 2 MEDICAL CONSULTANTS. REVIEWS BY MEDICAL CONSULTANT OF DISABILITY CLAIM CASE FILES FOR AGENCY DISABILITY PROGRAM.	\$84,000.00	\$84,000.00	2015	4/7/2015	4	SS021240008	0	SMALL BUSINESS
ARKANSAS DEPARTMENT OF HEALTH	IGF::OT::IGF OTHER FUNCTIONS ARKANSAS ELECTRONIC DEATH RECORDS (EDR) FOR OPTION YEAR III PERIOD OF PERFORMANCE JANUARY 1, 2015 - DECEMBER 31, 2015.	\$83,855.00	\$83,855.00	2015	12/22/2014	4	SS001260015	0	OTHER THAN SMALL BUSINESS
PUBLIC HEALTH, IOWA DEPARTMENT OF VOCATIONAL ALTERNATIVES INC	IGF::OT::IGF OTHER FUNCTIONS IA FOR RECEIPT OF ELECTRONIC DEATH RECORDS FOR OPTION YEAR III PERIOD OF PERFORMANCE JANUARY 1, 2015 - DECEMBER 31, 2015.	\$83,855.00	\$83,855.00	2015	12/22/2014	4	SS001260041	0	OTHER THAN SMALL BUSINESS
HOLMES, BARBARA A.	ME EXPRESS REPORTING - MENTAL HEALTH IGF::CT::IGF	\$83,790.00	\$83,790.00	2015	9/30/2015	2015	SS10631150137	0	SMALL BUSINESS
CALDWELL REHABILITATION CONSULTING	VE EXPRESS REPORTING IGF::CT::IGF	\$83,764.85	\$83,764.85	2015	9/30/2015	2015	SS10541140183	0	SMALL BUSINESS
POLSIN, THOMAS A	VE EXPRESS REPORTING IGF::CT::IGF	\$83,760.10	\$83,760.10	2015	9/30/2015	2015	SS10541140617	0	SMALL BUSINESS
	VE EXPRESS REPORTING IGF::CT::IGF	\$83,752.00	\$83,752.00	2015	9/30/2015	2015	SS11521100105	0	SMALL BUSINESS
BOWHEAD PROFESSIONAL SOLUTIONS, LLC	IGF::OT::IGF  THIS IS A ROUTINE TASK ORDER AGAINST CONTRACT SS00-14-61008 FOR OPTION YEAR II. THIS DELIVERY ORDER IS FOR IT SUPPORT SERVICES.	\$83,705.72	\$83,705.72	2015	5/8/2015	SS001530213	SS001461008	1	SMALL BUSINESS
JAY A STEINBRENNER	VE EXPRESS REPORTING IGF::CT::IGF	\$83,647.00	\$83,647.00	2015	9/30/2015	2015	SS10251120041	0	SMALL BUSINESS

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Vendor Name	Description of Requirement	Action Obligation	Base and All Options Value	Fiscal Year	Date Signed	PO/Delivery Order/Task Order/Call#	Parent Contract	Mod #	Contracting Officers Business Size Selection
PETER L LEE MD	IGF::CL::IGF BLANKET PURCHASE AGREEMENTS FOR CONTRACTORS TO PROVIDE REGIONAL MEDICAL CONSULTANT SERVICES FOR THE SOCIAL SECURITY ADMINISTRATION. REVIEWS BY MEDICAL CONSULTANT OF DISABILITY CLAIM CASE FILES FOR AGENCY DISABILITY PROGRAM. MODIFICATION TO ADD CASES AND EXTEND THE PERIOD OF PERFORMANCE.	\$83,400.00	\$83,400.00	2016	7/29/2016	1	SS09164C028	2	SMALL BUSINESS
E GONZALEZ, DELORES	VE EXPRESS REPORTING IGF::CT::IGF	\$83,271.00	\$83,271.00	2015	9/30/2015	2015	SS10691170023	0	SMALL BUSINESS
BEALE, ANDREW	VE EXPRESS REPORTING IGF::CT::IGF	\$83,258.35	\$83,258.35	2015	9/30/2015	2015	SS10381130175	0	SMALL BUSINESS
FARBER, MARK	ME EXPRESS REPORTING - MENTAL HEALTH IGF::CT::IGF	\$83,110.00	\$83,110.00	2015	9/30/2015	2015	SS10631150052	0	SMALL BUSINESS
GALLEN, AGNUS KLOSINSKI	VE EXPRESS REPORTING IGF::CT::IGF	\$83,096.00	\$83,096.00	2015	9/30/2015	2015	SS10381130065	0	SMALL BUSINESS
INNOVATION DATA PROCESSING, INC.	THIS MODIFICATION IS BEING ISSUED TO RELEASE FUNDI	\$83,095.00	\$83,095.00	2015	4/20/2015	SS001550008		4	OTHER THAN SMALL BUSINESS
MITCHELL, TED	VE EXPRESS REPORTING IGF::CT::IGF	\$83,081.33	\$83,081.33	2015	9/30/2015	2015	SS10541140159	0	SMALL BUSINESS
STEVEN GUMERMAN	VE EXPRESS REPORTING IGF::CT::IGF	\$82,960.00	\$82,960.00	2015	9/30/2015	2015	SS10381130031	0	SMALL BUSINESS
PAULINE PEGRAM-WARGEL	ME EXPRESS REPORTING - MENTAL HEALTH IGF::CT::IGF	\$82,832.00	\$82,832.00	2015	9/30/2015	2015	SS10631150349	0	SMALL BUSINESS
RINGENBERG, SHARON D	ME EXPRESS REPORTING - MENTAL HEALTH IGF::CT::IGF	\$82,823.40	\$82,823.40	2015	9/30/2015	2015	SS10631150123	0	SMALL BUSINESS
CHAPMAN, ILEANA T.	VE EXPRESS REPORTING IGF::CT::IGF	\$82,644.31	\$82,644.31	2015	9/30/2015	2015	SS10541140235	0	SMALL BUSINESS
HEARTLAND REHAB SVCS	ME EXPRESS REPORTING - MENTAL HEALTH IGF::CT::IGF	\$82,503.50	\$82,503.50	2015	9/30/2015	2015	SS10631150073	0	SMALL BUSINESS
ACROLINX GMBH	ACROLINX PLAIN LANGUAGE EDITING SOFTWARE - 500 S	\$82,500.00	\$82,500.00	2015	8/27/2015	SS001550269		0	OTHER THAN SMALL BUSINESS
SCHNEIDER ELECTRIC USA, INC.	IGF::CT::IGF - TECHNICAL SUPPORT, PREVENTIVE MAINTENANCE	\$16,483.36	\$82,416.80	2015	8/31/2015	SS001550277		0	OTHER THAN SMALL BUSINESS
MCCLANAHAN, MICHAEL C PHD	VE EXPRESS REPORTING IGF::CT::IGF	\$82,391.32	\$82,391.32	2015	9/30/2015	2015	SS10541140413	0	SMALL BUSINESS
JUDY L PANEK MD	ME EXPRESS REPORTING - MENTAL HEALTH IGF::CT::IGF	\$82,350.00	\$82,350.00	2015	9/30/2015	2015	SS10691170040	0	SMALL BUSINESS
RICHARDSON, RALPH E	VE EXPRESS REPORTING IGF::CT::IGF	\$82,347.89	\$82,347.89	2015	9/30/2015	2015	SS11501110043	0	SMALL BUSINESS
PSYCHOLOGICAL AND TRAINING SERVICES PA	VE EXPRESS REPORTING IGF::CT::IGF	\$82,255.08	\$82,255.08	2015	9/30/2015	2015	SS10541140613	0	SMALL BUSINESS
STROUD, MARILYN J	VE EXPRESS REPORTING IGF::CT::IGF	\$82,249.88	\$82,249.88	2015	9/30/2015	2015	SS10381330003	0	SMALL BUSINESS
VAUGHN, ANDREW	VE EXPRESS REPORTING IGF::CT::IGF	\$82,231.00	\$82,231.00	2015	9/30/2015	2015	SS10251120045	0	SMALL BUSINESS
CAPPS, A.MARK	VE EXPRESS REPORTING IGF::CT::IGF	\$82,122.00	\$82,122.00	2015	9/30/2015	2015	SS10541140427	0	SMALL BUSINESS
DAVID BISCARDI PHD LTD	IGF::CL::IGF REGION 5 MEDICAL CONSULTANTS. REVIEWS BY MEDICAL CONSULTANT OF DISABILITY CLAIM CASE FILES FOR AGENCY DISABILITY PROGRAM. CALL ORDER TO DAVID BISCARDI.	\$82,116.00	\$82,116.00	2016	3/18/2016	1	SS05164C004	0	SMALL BUSINESS
HEALTH, WASHINGTON STATE DEPARTMENT OF	ELECTRONIC DEATH REGISTRATION WASHINGTON THE PURPOSE OF MODIFICATION NUMBER 5 IS TO EXERCISE OPTION YEAR IV TO EXTEND THE TERM OF THE CONTRACT FROM JANUARY 1, 2016 THROUGH DECEMBER 31, 2016 FOR RECEIPT OF ELECTRONIC DEATH RECORDS.	\$0.00	\$82,095.00	2016	12/10/2015	SS001260023		5	OTHER THAN SMALL BUSINESS
INDEPENDENT ASSESMENT SERVICE	ME EXPRESS REPORTING - MENTAL HEALTH IGF::CT::IGF	\$82,081.09	\$82,081.09	2015	9/30/2015	2015	SS10631150059	0	SMALL BUSINESS
BLASE, MD MARVIN	MEDICAL CONSULTANT SERVICES - MENTAL CASES CLOSELY ASSOCIATED TO INHERENTLY GOVERNMENTAL FUNCTION IGF::CL::IGF	\$82,010.00	\$82,010.00	2015	3/4/2015	13	SS041140059	1	SMALL BUSINESS
DARRELL R CAUDILL M D	MEDICAL CONTRACTING SERVICES - PHYSICAL CASES CLOSELY ASSOCIATED TO INHERENTLY GOVERNMENTAL FUNCTION IGF::CL::IGF	\$82,010.00	\$82,010.00	2015	6/22/2015	12	SS041140035	0	SMALL BUSINESS
DISABILITY CONSULTANTS, LLC	MEDICAL CONTRACTOR SERVICES - MENTAL CASES CLOSELY ASSOCIATED TO INHERENTLY GOVERNMENTAL FUNCTION IGF::CL::IGF	\$82,010.00	\$82,010.00	2015	12/15/2014	33	SS041140025	0	SMALL BUSINESS



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DISABILITY CONSULTANTS, LLC	MEDICAL CONTRACTOR SERVICES - MENTAL CASES CLOSELY ASSOCIATED TO INHERENTLY GOVERNMENTAL FUNCTION IGF::CL::IGF	\$82,010.00	\$82,010.00	2015	6/24/2015	38	SS041140025	0	SMALL BUSINESS
KANG CHANG-WUK MD PA	DR. KANG MODIFICATION TO ADD CASES SS00-11-40086 IGF::CT::IGF	\$82,000.00	\$82,000.00	2015	1/21/2015	7	SS001140086	0	SMALL BUSINESS
JACOB TENDLER MD	DR. TENDLER MODIFICATION TO ADD CASES SS00-11-40032 IGF::CT::IGF	\$82,000.00	\$82,000.00	2015	1/13/2015	6	SS001140032	0	SMALL BUSINESS
ZUNIGA MD, LUIS M	DR. ZUNIGA MODIFICATION TO ADD CASES SS00-11-40021 IGF::OT::IGF	\$82,000.00	\$82,000.00	2015	1/13/2015	5	SS001140021	0	SMALL BUSINESS
RECOVERY DYNAMICS INC	ME EXPRESS REPORTING - MENTAL HEALTH IGF::CT::IGF	\$81,951.00	\$81,951.00	2015	9/30/2015	2015	SS10631150113	0	SMALL BUSINESS
SHI INTERNATIONAL CORP.	SONATYPE NEXUS MAINTENANCE	\$81,650.00	\$81,650.00	2016	3/29/2016	SS001650090		0	OTHER THAN SMALL BUSINESS
BENJAMIN CORTIJO JR MD	IGF::CL::IGF REGION 2 MEDICAL CONSULTANTS. REVIEWS BY MEDICAL CONSULTANT OF DISABILITY CLAIM CASE FILES FOR AGENCY DISABILITY PROGRAM.	\$81,620.00	\$81,620.00	2015	3/2/2015	15	SS021140074	0	SMALL BUSINESS
JUSINO-BERRIOS, CARLOS M	IGF::CL::IGF REGION 2 MEDICAL CONSULTANTS. REVIEWS BY MEDICAL CONSULTANT OF DISABILITY CLAIM CASE FILES FOR AGENCY DISABILITY PROGRAM.	\$81,620.00	\$81,620.00	2015	3/3/2015	13	SS021140086	0	SMALL BUSINESS
OSVALDO FULCO	IGF::CL::IGF REGION 2 MEDICAL CONSULTANTS. REVIEWS BY MEDICAL CONSULTANT OF DISABILITY CLAIM CASE FILES FOR AGENCY DISABILITY PROGRAM.	\$81,620.00	\$81,620.00	2015	5/13/2015	15	SS021140082	0	SMALL BUSINESS
PARK, SEUNG J. MD	IGF::CL::IGF REGION 2 MEDICAL CONSULTANTS. REVIEWS BY MEDICAL CONSULTANT OF DISABILITY CLAIM CASE FILES FOR AGENCY DISABILITY PROGRAM.	\$81,620.00	\$81,620.00	2015	4/7/2015	9	SS021140100	0	SMALL BUSINESS
SEYMOUR R BORTNER MD	IGF::CL::IGF REGION 2 MEDICAL CONSULTANTS. REVIEWS BY MEDICAL CONSULTANT OF DISABILITY CLAIM CASE FILES FOR AGENCY DISABILITY PROGRAM.	\$81,620.00	\$81,620.00	2015	2/27/2015	8	SS021140011	0	SMALL BUSINESS
ANDREW PRZYBYLA MD PC	IGF::CL::IGF REGION 2 MEDICAL CONSULTANTS. REVIEWS BY MEDICAL CONSULTANT OF DISABILITY CLAIM CASE FILES FOR AGENCY DISABILITY PROGRAM. MODIFICATION TO INCREASE QUANTITY AND EXTEND PERFORMANCE.	\$81,620.00	\$81,620.00	2015	6/16/2015	10	SS021140103	1	SMALL BUSINESS
KHURANA, HARPREET MD	IGF::CL::IGF REGION 2 MEDICAL CONSULTANTS. REVIEWS BY MEDICAL CONSULTANT OF DISABILITY CLAIM CASE FILES FOR AGENCY DISABILITY PROGRAM. MODIFICATION TO INCREASE QUANTITY AND EXTEND PERFORMANCE.	\$81,620.00	\$81,620.00	2015	6/18/2015	11	SS021140089	1	SMALL BUSINESS
PARK, SEUNG J. MD	IGF::CL::IGF REGION 2 MEDICAL CONSULTANTS. REVIEWS BY MEDICAL CONSULTANT OF DISABILITY CLAIM CASE FILES FOR AGENCY DISABILITY PROGRAM. MODIFICATION TO INCREASE QUANTITY AND EXTEND PERFORMANCE.	\$81,620.00	\$81,620.00	2015	6/15/2015	9	SS021140100	1	SMALL BUSINESS
WEISBERG, ROBERT A MD	IGF::CL::IGF 1000 CASE REVIEWS AT \$81.50 PER CASE RE	\$81,500.00	\$81,500.00	2016	7/18/2016	3	SS03154C007	0	SMALL BUSINESS



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NAOMI M KELLY	IGF::CL::IGF SS01-16-4C019 CALL ORDER FOR 1000 CASES AND 15 NON-CASE HOURS TO ESTABLISH THE CALL ORDER FOR THE PERIOD OF 04/01/2016 - 03/31/2017. THE RATE OF PAY IS \$80.14 PER CASE AND \$90.57 PER HOUR FOR TOTAL FUNDING OF \$81,498.55.	\$81,498.55	\$81,498.55	2016	2/22/2016	1	SS01164C019	0	SMALL BUSINESS
SKLAROFF, ROBERT B MD	ME EXPRESS REPORTING - MENTAL HEALTH IGF::CT::IGF	\$81,410.00	\$81,410.00	2015	9/30/2015	2015	SS10381130102	0	OTHER THAN SMALL BUSINESS
COGLIANO, ELAINE G	VE EXPRESS REPORTING IGF::CT::IGF	\$81,367.18	\$81,367.18	2015	9/30/2015	2015	SS11501110009	0	SMALL BUSINESS
GERMAN E MALARET MD	ME EXPRESS REPORTING - MENTAL HEALTH IGF::CT::IGF	\$81,280.00	\$81,280.00	2015	9/30/2015	2015	SS10251120070	0	SMALL BUSINESS
LARAIA, MICHAEL	VE EXPRESS REPORTING IGF::CT::IGF	\$81,217.35	\$81,217.35	2015	9/30/2015	2015	SS11501110045	0	SMALL BUSINESS
T.I.S. AMERICA INC.	EFLOW COMPLETION LICENSES	\$81,200.00	\$81,200.00	2015	5/14/2015	SS001550121		0	SMALL BUSINESS
GOLDSMITH, JOYCE MD	IGF::CL::IGF RMC TO CONDUCT INDEPENDENT CASE REVIEWS. REVIEWS BY MEDICAL CONSULTANT OF DISABILITY CLAIM CASE FILES FOR AGENCY DISABILITY PROGRESS	\$81,100.00	\$81,100.00	2016	7/13/2016	3	SS03154C009	0	SMALL BUSINESS
CHICAGO HEART-CHECK, LTD	ME EXPRESS REPORTING - MENTAL HEALTH IGF::CT::IGF	\$81,030.00	\$81,030.00	2015	9/30/2015	2015	SS10631150200	0	SMALL BUSINESS
EXECUTIVE OFFICE OF THE COMMONWEALTH OF PUERTO RICO	IGF::OT::IGF ELECTRONIC ONLINE VERIFICATION OF PUERTO RICO BIRTH, DEATH, AND MARRIAGE RECORDS	\$36,000.00	\$81,000.00	2015	8/6/2015	SS021360003		4	OTHER THAN SMALL BUSINESS
VAN WINKLE, DAVID	VE EXPRESS REPORTING IGF::CT::IGF	\$80,948.00	\$80,948.00	2015	9/30/2015	2015	SS10881190145	0	SMALL BUSINESS
GUSOFF, BERNARD D MD PC	ME EXPRESS REPORTING - MENTAL HEALTH IGF::CT::IGF	\$80,870.00	\$80,870.00	2015	9/30/2015	2015	SS10251120102	0	SMALL BUSINESS
SMITH, KENNETH R MA CRC VOCATIONAL REHABILITATION	VE EXPRESS REPORTING IGF::CT::IGF	\$80,850.00	\$80,850.00	2015	9/30/2015	2015	SS11501110047	0	SMALL BUSINESS
GRANT, ROBERT	VE EXPRESS REPORTING IGF::CT::IGF	\$80,814.00	\$80,814.00	2015	9/30/2015	2015	SS10781260018	0	SMALL BUSINESS
BITTINGER CORP.	MEDICAL CONTRACTOR SERVICES - PHYSICAL CASES CLOSELY ASSOCIATED TO INHERENTLY GOVERNMENTAL FUNCTION IGF::CL::IGF	\$80,779.85	\$80,779.85	2015	6/11/2015	20	SS041140038	0	SMALL BUSINESS
EDGHILL, TANYA M	VE EXPRESS REPORTING IGF::CT::IGF	\$80,674.00	\$80,674.00	2015	9/30/2015	2015	SS10251320027	0	SMALL BUSINESS
CHRISTIAN COMMUNITY RESOURCES	ME EXPRESS REPORTING - MENTAL HEALTH IGF::CT::IGF	\$80,624.75	\$80,624.75	2015	9/30/2015	2015	SS10631150196	0	SMALL BUSINESS
KATHY M HODGSON	VE EXPRESS REPORTING IGF::CT::IGF	\$80,566.00	\$80,566.00	2015	9/30/2015	2015	SS10691170077	0	SMALL BUSINESS
LESSNE, DANA	VE EXPRESS REPORTING IGF::CT::IGF	\$80,482.12	\$80,482.12	2015	9/30/2015	2015	SS10541140569	0	SMALL BUSINESS
COLB MD, A MARK	IGF::CL::IGF SS01-15-4C002 COLB, A MARK CALL ORDER FOR 1000 INDEPENDENT DISABILITY CASE REVIEWS FOR THE PERIOD OF PERFORMANCE 04/01/2016 - 03/31/2017. THE RATE OF PAY IS \$80.41 PER CASE FOR TOTAL FUNDING OF \$80,410.	\$80,410.00	\$80,410.00	2016	2/17/2016	4	SS01154C002	0	SMALL BUSINESS
BLUMENFIELD MD, HERBERT L	IGF::CL::IGF NEW BPA CALL ORDER FOR INDEPENDENT CASE REVIEWS	\$80,325.00	\$80,325.00	2016	5/27/2016	1	SS00164C056	0	SMALL BUSINESS
GUIDANCE PROCESS ASSOCIATES, INC.	ME EXPRESS REPORTING - MENTAL HEALTH IGF::CT::IGF	\$80,183.43	\$80,183.43	2015	9/30/2015	2015	SS10631150165	0	SMALL BUSINESS
MENDONCA, ROHINI HILAIRE	THIS IS TO FUND A NEW CALL ORDER FOR INDEPENDENT CASE REVIEWS AGAINST SS05-15-4C005, CALL ORDER 3, DR ROHINI MENDONCA IGF::CL::IGF	\$80,100.00	\$80,100.00	2016	6/29/2016	3	SS05154C005	0	SMALL BUSINESS
JOSE L. CHAPARRO MA CRC INC	VE EXPRESS REPORTING IGF::CT::IGF	\$80,081.00	\$80,081.00	2015	9/30/2015	2015	SS10881190137	0	SMALL BUSINESS
TIS AMERICAS, INC.	TIS EFLOW CUSTOM STATION LICENSES TO CREATE VIRTUAL	\$80,080.00	\$80,080.00	2016	7/20/2016	SS001650191		0	SMALL BUSINESS
JACK KUNDIN	IGF::CL::IGF MODIFICATION TO ADD CASES, ADD NON-CASES	\$80,043.90	\$80,043.90	2016	7/29/2016	1	SS09164C041	1	SMALL BUSINESS
BILLEHUS, ALLAN S	VE EXPRESS REPORTING IGF::CT::IGF	\$80,006.83	\$80,006.83	2015	9/30/2015	2015	SS10541440013	0	SMALL BUSINESS
NATIONAL GRID USA SERVICE COMPANY, INC.	IGF::OT::IGF GAS UTILITY SERVICE TO THE ADDABBO FEDERAL BUILDING, AT 155-10 JAMAICA AVE, JAMAICA NY 11432 PERIOD OF PERFORMANCE 08/01/2016 TO 07/31/2017.	\$80,000.00	\$80,000.00	2016	7/28/2016	SS021630004	GS00P12BSD0879	0	OTHER THAN SMALL BUSINESS
TENACITY, INC.	THE PROCUREMENT OF A NEW TEXT OVER INTERNET PR	\$40,000.00	\$80,000.00	2015	6/15/2015	SS001560035		0	SMALL BUSINESS
AMERICAN SERVICE NETWORK CORPORATION	IGF::CT::IGF EEO PROGRAM CONSULTANT SERVICES FOR	\$79,953.75	\$79,953.75	2015	6/12/2015	SS001550172		0	SMALL BUSINESS
HEALTH, WASHINGTON STATE DEPARTMENT OF	ELECTRONIC DEATH REGISTRATION - WASHINGTON STATE	\$0.00	\$79,945.00	2015	12/8/2014	SS001260023		4	OTHER THAN SMALL BUSINESS

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Vendor Name	Description of Requirement	Action Obligation	Base and All Options Value	Fiscal Year	Date Signed	PO/Delivery Order/Task Order/Call#	Parent Contract	Mod #	Contracting Officers Business Size Selection
JOHN J. KOMAR, PHD, LLC	VE EXPRESS REPORTING IGF::CT::IGF	\$79,936.00	\$79,936.00	2015	9/30/2015	2015	SS10881390029	0	SMALL BUSINESS
KHUSHALANI, ASHOK I, MD	VE EXPRESS REPORTING IGF::CT::IGF	\$79,850.00	\$79,850.00	2015	9/30/2015	2015	SS10781160012	0	SMALL BUSINESS
HOISETH ASSOCIATES	ME EXPRESS REPORTING - MENTAL HEALTH IGF::CT::IGF	\$79,813.00	\$79,813.00	2015	9/30/2015	2015	SS10631150127	0	SMALL BUSINESS
WORTHINGTON, AIDA Y CONSULTING FIRM	VE EXPRESS REPORTING IGF::CT::IGF	\$79,719.00	\$79,719.00	2015	9/30/2015	2015	SS10881190083	0	SMALL BUSINESS
SUSANNA D ROCHE	VE EXPRESS REPORTING IGF::CT::IGF	\$79,674.60	\$79,674.60	2015	9/30/2015	2015	SS10541140343	0	SMALL BUSINESS
JOHNSON, MYRTLE M	VE EXPRESS REPORTING IGF::CT::IGF	\$79,550.00	\$79,550.00	2015	9/30/2015	2015	SS10781160215	0	SMALL BUSINESS
HUMAN SERVICES OUTCOMES, INC.	VE EXPRESS REPORTING IGF::CT::IGF	\$79,527.00	\$79,527.00	2015	9/30/2015	2015	SS10541140255	0	SMALL BUSINESS
STAR LEADERSHIP DEVELOPMENT INC	VE EXPRESS REPORTING IGF::CT::IGF	\$79,467.56	\$79,467.56	2015	9/30/2015	2015	SS10381130055	0	SMALL BUSINESS
PEARSON AND ASSOCIATES	VE EXPRESS REPORTING IGF::CT::IGF	\$79,099.53	\$79,099.53	2015	9/30/2015	2015	SS10541140511	0	SMALL BUSINESS
KARANDE MD, MEGHANA C	RMC - CASE REVIEWS IGF::CL::IGF CLOSELY ASSOCIATED	\$79,070.00	\$79,070.00	2015	3/26/2015	11	SS011140019	0	SMALL BUSINESS
PARAMETERS REHABILITATION SERVICES, INC.	VE EXPRESS REPORTING IGF::CT::IGF	\$79,034.00	\$79,034.00	2015	9/30/2015	2015	SS10881390011	0	SMALL BUSINESS
JOHN J SHANE,JOHN J MD INC	IGF::CL::IGF REGIONAL MEDICAL CONSULTANT TO CONDUCT INDEPENDENT CASE REVIEWS. REVIEWS BY MEDICAL CONSULTANT OF DISABILITY CLAIM CASE FILES FOR AGENCY DISABILITY PROGRAM	\$79,000.00	\$79,000.00	2016	7/11/2016	2	SS03154C004	0	SMALL BUSINESS
JACQUELINE FARWELL	MEDICAL CONSULTANT SERVICES IGF::CT::IGF INDEPENDENT CASE REVIEWS	\$78,960.00	\$78,960.00	2015	4/13/2015	1	SS10154C006	0	SMALL BUSINESS
HERMAN MILLER, INC.	EX97 - OAKLAND (ODAR), CA - REQUISITION IS TO ORDER	\$78,865.52	\$78,865.52	2015	4/14/2015	SS001530403	SS001260003	0	OTHER THAN SMALL BUSINESS
SALVA, AMY	VE EXPRESS REPORTING IGF::CT::IGF	\$78,832.00	\$78,832.00	2015	9/30/2015	2015	SS10691170079	0	SMALL BUSINESS
SIMS, DIANA C & ASSOCIATES INC	VE EXPRESS REPORTING IGF::CT::IGF	\$78,728.00	\$78,728.00	2015	9/30/2015	2015	SS10381130125	0	SMALL BUSINESS
WILLIAMS, SONIA	OMA MEDICAL CONSULTANTS. REVIEWS BY MEDICAL CONSULTANT OF DISABILITY CLAIM CASE FILES FOR AGENCY DISABILITY PROGRAM. AWARD DR. WILLIAMS. INDEPENDENT CASE REVIEWS AND NON-CASE SERVICES. IGF::CL::IGF	\$78,575.00	\$78,575.00	2016	5/31/2016	1	SS00164C052	0	SMALL BUSINESS
KULATHUNGAM, MANORANJITHAM	IGF::CL::IGF OMA MEDICAL CONSULTANTS. REVIEWS BY MEDICAL CONSULTANT OF DISABILITY CLAIM CASE FILES FOR AGENCY DISABILITY PROGRAM.	\$78,510.00	\$78,510.00	2016	5/25/2016	1	SS00164C027	0	SMALL BUSINESS
SILLS MD,EDWARD M	OMA MEDICAL CONSULTANTS. REVIEWS BY MEDICAL CONSULTANT OF DISABILITY CLAIM CASE FILES FOR AGENCY DISABILITY PROGRAM. IGF::CL::IGF	\$78,510.00	\$78,510.00	2016	5/25/2016	1	SS00164C042	0	SMALL BUSINESS
STOLLER, DANA M.	VE EXPRESS REPORTING IGF::CT::IGF	\$78,493.00	\$78,493.00	2015	9/30/2015	2015	SS10541340009	0	SMALL BUSINESS
OLIVE, DON A	ME EXPRESS REPORTING - MENTAL HEALTH IGF::CT::IGF	\$78,470.00	\$78,470.00	2015	9/30/2015	2015	SS10631150130	0	SMALL BUSINESS
KRAVITZ, LARRY	ME EXPRESS REPORTING - MENTAL HEALTH IGF::CT::IGF	\$78,340.00	\$78,340.00	2015	9/30/2015	2015	SS10631150220	0	OTHER THAN SMALL BUSINESS
STEIN, LINDA A	VE EXPRESS REPORTING IGF::CT::IGF	\$78,338.00	\$78,338.00	2015	9/30/2015	2015	SS10251320047	0	SMALL BUSINESS
STEPHENS, CYNTHIA	VE EXPRESS REPORTING IGF::CT::IGF	\$78,232.19	\$78,232.19	2015	9/30/2015	2015	SS10541340037	0	SMALL BUSINESS
DIANNE G SMITH	VE EXPRESS REPORTING IGF::CT::IGF	\$78,175.00	\$78,175.00	2015	9/30/2015	2015	SS10781160091	0	SMALL BUSINESS
LANE, SHARON	VE EXPRESS REPORTING IGF::CT::IGF	\$78,121.00	\$78,121.00	2015	9/30/2015	2015	SS10541140425	0	SMALL BUSINESS
PERSONNEL RESOURCE CONSULTANTS	VE EXPRESS REPORTING IGF::CT::IGF	\$77,962.00	\$77,962.00	2015	9/30/2015	2015	SS11511180085	0	SMALL BUSINESS
FIDANZA, NICHOLAS S	VE EXPRESS REPORTING IGF::CT::IGF	\$77,949.18	\$77,949.18	2015	9/30/2015	2015	SS10541140481	0	SMALL BUSINESS
CROSSROADS BUILDING SERVICES INCORPORATED	JANITORIAL/CUSTODIAL SERVICES FOR FRANK HAGEL FEDERAL BUILDING, RICHMOND, CALIFORNIA. FOLLOW- ON YEAR EIGHT - JULY 1, 2015 TO JUNE 30, 2016 N/A PRIOR 03/01/2012	\$1,433,078.22	\$77,787.08	2015	6/22/2015	SS000760045		31	OTHER THAN SMALL BUSINESS
DIVERSIFIED DISABILITY & VOCATIONAL SERVICES, INC.	VE EXPRESS REPORTING IGF::CT::IGF	\$77,786.00	\$77,786.00	2015	9/30/2015	2015	SS10381130153	0	SMALL BUSINESS
GLOBAL CAREER CONSULTANTS, INCORPORATED	VE EXPRESS REPORTING IGF::CT::IGF	\$77,781.35	\$77,781.35	2015	9/30/2015	2015	SS10381130267	0	SMALL BUSINESS
GM PSYCHOLOGICAL SERVICES, INC.	MEDICAL CONSULTANT SERVICES DR. ERIKA GILYOT-MONTGOMERY IGF::CL::IGF	\$77,554.00	\$77,554.00	2016	3/15/2016	1	SS05164C032	0	SMALL BUSINESS
HARMON, BRIAN	VE EXPRESS REPORTING IGF::CT::IGF	\$77,487.00	\$77,487.00	2015	9/30/2015	2015	SS10631350003	0	SMALL BUSINESS
MOSLEY REHABILITATION MANAGEMENT, LLC	VE EXPRESS REPORTING IGF::CT::IGF	\$77,413.00	\$77,413.00	2015	9/30/2015	2015	SS10631350039	0	SMALL BUSINESS

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FORTUNO, RAMON O MD	ME EXPRESS REPORTING - MENTAL HEALTH IGF::CT::IGF	\$77,400.00	\$77,400.00	2015	9/30/2015	2015	SS10251120046	0	SMALL BUSINESS
ANDERSON ASSOCIATES PSYCHOLOGY & CONSULTING	VE EXPRESS REPORTING IGF::CT::IGF	\$77,376.80	\$77,376.80	2015	9/30/2015	2015	SS10381130099	0	SMALL BUSINESS
CHRISTENSEN, JESSICA	ME EXPRESS REPORTING - MENTAL HEALTH IGF::CT::IGF	\$77,363.62	\$77,363.62	2015	9/30/2015	2015	SS10631150071	0	SMALL BUSINESS
DIRECTIONS GROUP INC, THE	VE EXPRESS REPORTING IGF::CT::IGF	\$77,223.25	\$77,223.25	2015	9/30/2015	2015	SS10541140687	0	SMALL BUSINESS
CHANDLER, CHERYL R MA	VE EXPRESS REPORTING IGF::CT::IGF	\$77,175.00	\$77,175.00	2015	9/30/2015	2015	SS10881190009	0	SMALL BUSINESS
NEWTON, JAMES R	VE EXPRESS REPORTING IGF::CT::IGF	\$77,164.36	\$77,164.36	2015	9/30/2015	2015	SS10541140641	0	SMALL BUSINESS
VXD SYSTEMS INC.	TONER FOR THE PANASONIC PANAFAX MACHINES	\$77,144.90	\$77,144.90	2016	9/30/2016	SS091652004		0	SMALL BUSINESS
BURKHAMMER, GENE J	ME EXPRESS REPORTING - MENTAL HEALTH IGF::CT::IGF	\$77,135.00	\$77,135.00	2015	9/30/2015	2015	SS10631150277	0	SMALL BUSINESS
KHURANA MD, HARPREET	IGF::CL::IGF REGION 2 MEDICAL CONSULTANTS. REVIEWS BY MEDICAL CONSULTANT OF DISABILITY CLAIM CASE FILES FOR AGENCY DISABILITY PROGRAM. INCREASE CASE REVIEW QUANTITY AND EXTEND PERIOD OF PERFORMANCE.	\$77,041.20	\$77,041.20	2016	6/8/2016	1	SS02164C014	1	SMALL BUSINESS
DIRECTIONS GROUP INC, THE	VE EXPRESS REPORTING IGF::CT::IGF	\$77,002.00	\$77,002.00	2015	9/30/2015	2015	SS10541140687	0	SMALL BUSINESS
YOUNGER, CYNTHIA A	VE EXPRESS REPORTING IGF::CT::IGF	\$76,978.00	\$76,978.00	2015	9/30/2015	2015	SS10691170083	0	SMALL BUSINESS
KRAMER CONSULTING	VE EXPRESS REPORTING IGF::CT::IGF	\$76,863.48	\$76,863.48	2015	9/30/2015	2015	SS11521100031	0	SMALL BUSINESS
THOMAS G. MUNGALL, LRC	VE EXPRESS REPORTING IGF::CT::IGF	\$76,834.90	\$76,834.90	2015	9/30/2015	2015	SS10781160017	0	SMALL BUSINESS
JACQUELYN SCHABACKER	ME EXPRESS REPORTING - MENTAL HEALTH IGF::CT::IGF	\$76,668.00	\$76,668.00	2015	9/30/2015	2015	SS10631150205	0	SMALL BUSINESS
RAMIREZ, RICARDO J	IGF::CL::IGF SS01-16-4C025 RAMIREZ, RICARDO REQUISITION CALL ORDER FOR 900 INDEPENDENT DISABILITY CASE REVIEWS AND 50 NON-CASE HOURS TO ESTABLISH FOR THE PERIOD OF 04/01/2016 - 03/31/2017. THE RATE OF PAY IS \$80.14 PER CASE AND \$90.57 PER HOUR FOR TOTAL FUNDING OF \$76,654.50.	\$76,654.50	\$76,654.50	2016	2/17/2016	1	SS01164C025	0	SMALL BUSINESS
WILLIAM T CODY	ME EXPRESS REPORTING - MENTAL HEALTH IGF::CT::IGF	\$76,394.66	\$76,394.66	2015	9/30/2015	2015	SS10631150051	0	SMALL BUSINESS
ELLEN ROZENFELD	ME EXPRESS REPORTING - MENTAL HEALTH IGF::CT::IGF	\$76,300.00	\$76,300.00	2015	9/30/2015	2015	SS10631150192	0	SMALL BUSINESS
ELLEN ROZENFELD	ME EXPRESS REPORTING - MENTAL HEALTH IGF::CT::IGF	\$76,230.00	\$76,230.00	2015	9/30/2015	2015	SS10631150192	0	SMALL BUSINESS
TOPCIK, HELEN M	VE EXPRESS REPORTING IGF::CT::IGF	\$76,146.00	\$76,146.00	2015	9/30/2015	2015	SS10631150027	0	SMALL BUSINESS
CHRISTINE SPAULDING	VE EXPRESS REPORTING IGF::CT::IGF	\$76,091.50	\$76,091.50	2015	9/30/2015	2015	SS11501110049	0	SMALL BUSINESS
STACY KOUTRAKOS, PSY.D.	IGF::CL::IGF CLOSELY ASSOCIATED CLOSELY ASSOCIATE	\$76,000.00	\$76,000.00	2016	3/11/2016	3	SS08164C012	0	SMALL BUSINESS
CAREER CONSULTING INCORPORATED	VE EXPRESS REPORTING IGF::CT::IGF	\$75,998.65	\$75,998.65	2015	9/30/2015	2015	SS10691170073	0	SMALL BUSINESS
CAREER CONSULTING INCORPORATED	VE EXPRESS REPORTING IGF::CT::IGF	\$75,983.00	\$75,983.00	2015	9/30/2015	2015	SS10691170073	0	SMALL BUSINESS
CLIFTON KING JR	VE EXPRESS REPORTING IGF::CT::IGF	\$75,958.00	\$75,958.00	2015	9/30/2015	2015	SS10781160309	0	SMALL BUSINESS
TED S MACY	ME EXPRESS REPORTING - MENTAL HEALTH IGF::CT::IGF	\$75,941.00	\$75,941.00	2015	9/30/2015	2015	SS10631150159	0	SMALL BUSINESS
DISABILITY VOC ASSOC	VE EXPRESS REPORTING IGF::CT::IGF	\$75,842.18	\$75,842.18	2015	9/30/2015	2015	SS10781160197	0	SMALL BUSINESS
HEALD, MARSHA N	VE EXPRESS REPORTING IGF::CT::IGF	\$75,810.50	\$75,810.50	2015	9/30/2015	2015	SS10781160085	0	SMALL BUSINESS
SECURITY DETECTION, INC.	WE SEEK TO AWARD A FIRM-FIXED-PRICE PURCHASE OR	\$75,762.63	\$75,762.63	2016	9/6/2016	SS001650242		0	SMALL BUSINESS
ZEEDA'S VOCATIONAL COUNSELING & PLACEMENT SERVICES	VE EXPRESS REPORTING IGF::CT::IGF	\$75,688.00	\$75,688.00	2015	9/30/2015	2015	SS10781160123	0	SMALL BUSINESS
JOE WESLEY MANN	VE EXPRESS REPORTING IGF::CT::IGF	\$75,660.67	\$75,660.67	2015	9/30/2015	2015	SS10541140289	0	SMALL BUSINESS
DUFFY, JENNIFER M	IGF::CL::IGF REGION 9 MEDICAL CONSULTANTS. REVIEWS BY MEDICAL CONSULTANT OF DISABILITY CLAIM CASE FILES FOR AGENCY DISABILITY PROGRAM. CALL ORDER TO AWARD JENNIFER DUFFY 900 CASES AND 6 NON-CASE HOURS.	\$75,639.78	\$75,639.78	2016	2/26/2016	1	SS09164C035	0	SMALL BUSINESS
ALVIN SMITH PHD	VE EXPRESS REPORTING IGF::CT::IGF	\$75,600.00	\$75,600.00	2015	9/30/2015	2015	SS10781160036	0	SMALL BUSINESS
BOARDMAN, CHRISTINA	VE EXPRESS REPORTING IGF::CT::IGF	\$75,485.00	\$75,485.00	2015	9/30/2015	2015	SS10251120003	0	OTHER THAN SMALL BUSINESS
TENDLER, JACOB MD	IGF::CL::IGF OMA MEDICAL CONSULTANTS. REVIEWS BY MEDICAL CONSULTANT OF DISABILITY CLAIM CASE FILES FOR AGENCY DISABILITY PROGRAM. ADDING NON-CASE SERVICES (AND/OR CASE REVIEWS AS APPLICABLE).	\$75,400.00	\$75,400.00	2016	9/6/2016	1	SS00164C046	1	SMALL BUSINESS
GEORGE HORNE	VE EXPRESS REPORTING IGF::CT::IGF	\$75,363.00	\$75,363.00	2015	9/30/2015	2015	SS10691170025	0	SMALL BUSINESS
MCKAY, JACKSON C	VE EXPRESS REPORTING IGF::CT::IGF	\$75,337.00	\$75,337.00	2015	9/30/2015	2015	SS10541140185	0	SMALL BUSINESS
ALEXANDER III MD, HADDON C	ME EXPRESS REPORTING - MENTAL HEALTH IGF::CT::IGF	\$75,320.00	\$75,320.00	2015	9/30/2015	2015	SS10381130024	0	SMALL BUSINESS

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BUNN-DURHAM & ASSOCIATES, INC	VE EXPRESS REPORTING IGF::CT::IGF	\$75,264.00	\$75,264.00	2015	9/30/2015	2015	SS10541140581	0	SMALL BUSINESS
CLEMMONS & ASSOCIATES LLC	VE EXPRESS REPORTING IGF::CT::IGF	\$75,248.00	\$75,248.00	2015	9/30/2015	2015	SS10541140391	0	SMALL BUSINESS
	REQUEST FOR NEW CALL ORDER FOR LARRY CALDWELL FOR CASES AND NON CASE SERVICE HOURS								
CALDWELL MD, LARRY V	IGF::CL::IGF	\$75,060.00	\$75,060.00	2016	3/14/2016	1	SS04164C035	0	SMALL BUSINESS
GENERAUX BUSINESS CONSULTANTS INC	VE EXPRESS REPORTING IGF::CT::IGF	\$75,028.00	\$75,028.00	2015	9/30/2015	2015	SS10881190057	0	SMALL BUSINESS
WISE, CAROLYN KAYE	VE EXPRESS REPORTING IGF::CT::IGF	\$75,026.90	\$75,026.90	2015	9/30/2015	2015	SS11521100107	0	SMALL BUSINESS
	FHFB UTILITIES- GAS AND ELECTRIC (8/1/14 - 7/31/15)								
PACIFIC GAS AND ELECTRIC COMPANY	IGF::CT::IGF CRITICAL FUNCTIONS	\$75,000.00	\$75,000.00	2015	7/11/2015	SS091430001	GS00P07BSD0505	1	OTHER THAN SMALL BUSINESS
	IGF::OT::IGF PURCHASE ORDER FOR RENEWAL OF ELECTRONIC SUBSCRIPTION ENTITLED, GVISOR.								
GALLAGHER BENEFIT SERVICES, INC.	PREVIOUSLY PURCHASED UNDER SS00-12-50086.	\$25,000.00	\$75,000.00	2015	12/18/2014	SS001550050		0	OTHER THAN SMALL BUSINESS
LEAD TECHNOLOGIES, INC.	LEADTOOLS DOCUMENT IMAGING SDK VERSION 14.5 SW	\$75,000.00	\$75,000.00	2016	6/2/2016	SS001650144		0	SMALL BUSINESS
KUUTTILA, KARYL	VE EXPRESS REPORTING IGF::CT::IGF	\$74,979.75	\$74,979.75	2015	9/30/2015	2015	SS10781160273	0	SMALL BUSINESS
DONNA VERALDI MD	VE EXPRESS REPORTING IGF::CT::IGF	\$74,850.00	\$74,850.00	2015	9/30/2015	2015	SS11511180012	0	SMALL BUSINESS
	IGF::CL::IGF REGION 2 MEDICAL CONSULTANTS. REVIEWS BY MEDICAL CONSULTANT OF DISABILITY CLAIM CASE FILES FOR AGENCY DISABILITY PROGRAM.	\$74,721.68	\$74,721.68	2016	12/31/2015	1	SS02164C004	0	SMALL BUSINESS
CHOPRA, MD, ARVIND	VE EXPRESS REPORTING IGF::CT::IGF	\$74,710.00	\$74,710.00	2015	9/30/2015	2015	SS10691170059	0	SMALL BUSINESS
TEIXEIRA, JENIFER	ME EXPRESS REPORTING - MENTAL HEALTH IGF::CT::IGF	\$74,694.70	\$74,694.70	2015	9/30/2015	2015	SS10631150241	0	SMALL BUSINESS
ROBB, MICHELE	VE EXPRESS REPORTING IGF::CT::IGF	\$74,584.08	\$74,584.08	2015	9/30/2015	2015	SS10541140287	0	SMALL BUSINESS
HEARTSILL & ASSOCIATES, INC.	OMA MEDICAL CONSULTANTS. REVIEWS BY MEDICAL CONSULTANT OF DISABILITY CLAIM CASE FILES FOR AGENCY DISABILITY PROGRAM. AWARDING DR. BONGIOVANI INDEPENDENT CASE REVIEWS AND NON-CASE SERVICES.								
BONGIOVANI, MARYANNE PHD	IGF::CL::IGF	\$74,550.00	\$74,550.00	2016	5/27/2016	1	SS00164C072	0	SMALL BUSINESS
JUDITH A HARPER	VE EXPRESS REPORTING IGF::CT::IGF	\$74,438.00	\$74,438.00	2015	9/30/2015	2015	SS10781160305	0	SMALL BUSINESS
VOCATIONAL ASSESSMENT AND COUNSELING SERVICES, INC.	ME EXPRESS REPORTING - MENTAL HEALTH IGF::CT::IGF	\$74,436.00	\$74,436.00	2015	9/30/2015	2015	SS10631150155	0	SMALL BUSINESS
JMK OF TAMPA, INC.	VE EXPRESS REPORTING IGF::CT::IGF	\$74,416.60	\$74,416.60	2015	9/30/2015	2015	SS10541140491	0	SMALL BUSINESS
DIAMOND MIND, LLC	VE EXPRESS REPORTING IGF::CT::IGF	\$74,275.67	\$74,275.67	2015	9/30/2015	2015	SS10781460002	0	SMALL BUSINESS
COHEN, CHARLES	VE EXPRESS REPORTING IGF::CT::IGF	\$74,241.00	\$74,241.00	2015	9/30/2015	2015	SS10381130089	0	SMALL BUSINESS
KATHLEEN O'BRIEN	ME EXPRESS REPORTING - MENTAL HEALTH IGF::CT::IGF	\$74,210.00	\$74,210.00	2015	9/30/2015	2015	SS10631150120	0	SMALL BUSINESS
DR TOM WAGNER	ME EXPRESS REPORTING - MENTAL HEALTH IGF::CT::IGF	\$74,208.70	\$74,208.70	2015	9/30/2015	2015	SS10541140186	0	SMALL BUSINESS
ROSKO, MICHAEL E	ME EXPRESS REPORTING - MENTAL HEALTH IGF::CT::IGF	\$74,207.00	\$74,207.00	2015	9/30/2015	2015	SS10631150379	0	SMALL BUSINESS
ANDERSON, CARRIE	VE EXPRESS REPORTING IGF::CT::IGF	\$74,168.00	\$74,168.00	2015	9/30/2015	2015	SS10631150429	0	SMALL BUSINESS
MICHAEL SWANSON	VE EXPRESS REPORTING IGF::CT::IGF	\$74,125.00	\$74,125.00	2015	9/30/2015	2015	SS11521100041	0	SMALL BUSINESS
DONNA JOHNSON	VE EXPRESS REPORTING IGF::CT::IGF	\$73,973.00	\$73,973.00	2015	9/30/2015	2015	SS10781160163	0	SMALL BUSINESS
	IGF::CL::IGF REGION 9 MEDICAL CONSULTANTS. REVIEWS BY MEDICAL CONSULTANT OF DISABILITY CLAIM CASE FILES FOR AGENCY DISABILITY PROGRAM. CALL ORDER TO AWARD ALICIA BLANDO 875 CASES AND 10 NON-CASE HOURS.	\$73,941.30	\$73,941.30	2016	2/29/2016	1	SS09164C031	0	SMALL BUSINESS
BLANDO, ALICIA V	VE EXPRESS REPORTING IGF::CT::IGF	\$73,908.98	\$73,908.98	2015	9/30/2015	2015	SS10381130255	0	SMALL BUSINESS
POSEY, PATRICIA	VE EXPRESS REPORTING IGF::CT::IGF	\$73,862.00	\$73,862.00	2015	9/30/2015	2015	SS10251120051	0	SMALL BUSINESS
GUERRA PRADOS, HECTOR J, DR	VE EXPRESS REPORTING IGF::CT::IGF	\$73,856.00	\$73,856.00	2015	9/30/2015	2015	SS10541140355	0	SMALL BUSINESS
CARLISLE REHABILITATION SERVICES	VE EXPRESS REPORTING IGF::CT::IGF	\$73,810.02	\$73,810.02	2015	9/30/2015	2015	SS10541140321	0	SMALL BUSINESS
MED-VOC SOLUTIONS	OMA MEDICAL CONSULTANTS. REVIEWS BY MEDICAL CONSULTANT OF DISABILITY CLAIM CASE FILES FOR AGENCY DISABILITY PROGRAM. AWARDING DR. WALCHER INDEPENDENT CASE REVIEWS AND NON-CASE SERVICES.								
JAMES R WALCHER MD	IGF::CL::IGF	\$73,810.00	\$73,810.00	2016	5/27/2016	1	SS00164C049	0	SMALL BUSINESS

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Vendor Name	Description of Requirement	Action Obligation	Base and All Options Value	Fiscal Year	Date Signed	PO/Delivery Order/Task Order/Call#	Parent Contract	Mod #	Contracting Officers Business Size Selection
HARPER, JOHN T	MEDICAL CONSULTANT SERVICES - PHYSICAL CASES CLOSELY ASSOCIATED TO INHERENTLY GOVERNMENTAL FUNCTION IGF::CL::IGF	\$73,809.00	\$73,809.00	2015	6/22/2015	12	SS041140051	0	SMALL BUSINESS
HAMMONDS, T MICHAEL PHD	MEDICAL CONTRACTOR SERVICES - MENTAL CASES CLOSELY ASSOCIATED TO INHERENTLY GOVERNMENTAL FUNCTION IGF::CL::IGF FOR CLOSELY ASSOCIATED	\$73,809.00	\$73,809.00	2015	3/3/2015	16	SS041140022	1	SMALL BUSINESS
PARKER VOCATIONAL CONSULTING	VE EXPRESS REPORTING IGF::CT::IGF	\$73,768.22	\$73,768.22	2015	9/30/2015	2015	SS11501110071	0	SMALL BUSINESS
JIMENEZ PSYD, JUNE	ME EXPRESS REPORTING - MENTAL HEALTH IGF::CT::IGF	\$73,730.00	\$73,730.00	2015	9/30/2015	2015	SS10251120034	0	SMALL BUSINESS
HERMAN MILLER, INC.	SAN RAFAEL, CA #S988 - RELOCATION WITH DEMOUNTA	\$73,566.58	\$73,566.58	2016	9/15/2016	SS001630801	SS001260003	0	OTHER THAN SMALL BUSINESS
MARY JONES	REGION V MEDICAL CONSULTANT SERVICES FOR THE SOCIAL SECURITY ADMINISTRATION. REVIEWS BY MEDICAL CONSULTANT OF DISABILITY CLAIM CASE FILES FOR AGENCY DISABILITY PROGRAM. ADDING INDEPENDENT CASE REVIEWS. IGF::CL::IGF	\$73,539.44	\$73,539.44	2016	9/28/2016	2	SS05164C033	1	SMALL BUSINESS
JERRY TAYLOR	VE EXPRESS REPORTING IGF::CT::IGF	\$73,514.28	\$73,514.28	2015	9/30/2015	2015	SS10781160295	0	SMALL BUSINESS
KHURANA, HARPREET MD	IGF::CL::IGF REGION 2 MEDICAL CONSULTANTS. REVIEWS BY MEDICAL CONSULTANT OF DISABILITY CLAIM CASE FILES FOR AGENCY DISABILITY PROGRAM.	\$73,458.00	\$73,458.00	2015	3/3/2015	11	SS021140089	0	SMALL BUSINESS
JUSINO-BERRIOS, CARLOS M	IGF::CL::IGF REGION 2 MEDICAL CONSULTANTS. REVIEWS BY MEDICAL CONSULTANT OF DISABILITY CLAIM CASE FILES FOR AGENCY DISABILITY PROGRAM. MODIFICATION TO INCREASE QUANTITY AND EXTEND PERFORMANCE.	\$73,458.00	\$73,458.00	2015	6/12/2015	13	SS021140086	1	SMALL BUSINESS
COWART & ASSOCIATES	VE EXPRESS REPORTING IGF::CT::IGF	\$73,419.92	\$73,419.92	2015	9/30/2015	2015	SS11511180109	0	SMALL BUSINESS
PEARSON, JOSIAH L	VE EXPRESS REPORTING IGF::CT::IGF	\$73,418.00	\$73,418.00	2015	9/30/2015	2015	SS10251220008	0	SMALL BUSINESS
H RICHARD WARANCH	IGF::CL::IGF OMA MEDICAL CONSULTANTS. REVIEWS BY MEDICAL CONSULTANT OF DISABILITY CLAIM CASE FILES FOR AGENCY DISABILITY PROGRAM.	\$73,400.00	\$73,400.00	2016	5/31/2016	1	SS00164C051	0	SMALL BUSINESS
SANDRA TROST & ASSOCIATES	VE EXPRESS REPORTING IGF::CT::IGF	\$73,354.00	\$73,354.00	2015	9/30/2015	2015	SS10881190175	0	SMALL BUSINESS
CHUKWUEMEKA, EFOBI	ME EXPRESS REPORTING - MENTAL HEALTH IGF::CT::IGF	\$73,320.00	\$73,320.00	2015	9/30/2015	2015	SS10251120042	0	SMALL BUSINESS
RONALD W MORRELL	VE EXPRESS REPORTING IGF::CT::IGF	\$73,303.00	\$73,303.00	2015	9/30/2015	2015	SS10881190141	0	SMALL BUSINESS
BARRY F RUDNICK MD	OMA MEDICAL CONSULTANTS. REVIEWS BY MEDICAL CO	\$73,100.00	\$73,100.00	2016	8/30/2016	1	SS00164C039	1	SMALL BUSINESS
PSYCHOTHERAPY AND COUNSELING SERVICES, PLLC	VE EXPRESS REPORTING IGF::CT::IGF	\$73,066.07	\$73,066.07	2015	9/30/2015	2015	SS10541140521	0	SMALL BUSINESS
HEALTH & HUMAN SERVICES, NORTH CAROLINA DEPARTMENT OF	IGF::CL::IGF CLOSELY ASSOCIATED DC SS00-12-60019 ELECTRONIC DEATH REGISTRATION DELIVERY ORDER. 83,000 EDR RECORDS TOTAL DELIVERY ORDER \$73,040.00. PERIOD OF PERFORMANCE 1/01/2016 - 12/31/2016.	\$73,040.00	\$73,040.00	2016	12/22/2015	5	SS001260049	0	OTHER THAN SMALL BUSINESS
BYRON PETTINGILL	VE EXPRESS REPORTING IGF::CT::IGF	\$73,033.00	\$73,033.00	2015	9/30/2015	2015	SS10781160167	0	SMALL BUSINESS
LEE A FISCHER MD PC	ME EXPRESS REPORTING - MENTAL HEALTH IGF::CT::IGF	\$73,020.00	\$73,020.00	2015	9/30/2015	2015	SS10631150056	0	SMALL BUSINESS
LIPETZ, PSY. D, BRUCE D	IGF::CL::IGF CLOSELY ASSOCIATED - REGIONAL MEDICA	\$72,960.00	\$72,960.00	2016	5/10/2016	3	SS08164C014	0	SMALL BUSINESS
HILEMAN VOCATIONAL SERVICES, INC.	VE EXPRESS REPORTING IGF::CT::IGF	\$72,937.00	\$72,937.00	2015	9/30/2015	2015	SS10381130053	0	SMALL BUSINESS
HECK, MARGARET	VE EXPRESS REPORTING IGF::CT::IGF	\$72,929.00	\$72,929.00	2015	9/30/2015	2015	SS10251420011	0	SMALL BUSINESS
SHELLY EIKE & ASSOCIATES	VE EXPRESS REPORTING IGF::CT::IGF	\$72,921.43	\$72,921.43	2015	9/30/2015	2015	SS10781160127	0	SMALL BUSINESS
BARRY W MURPHY	VE EXPRESS REPORTING IGF::CT::IGF	\$72,897.15	\$72,897.15	2015	9/30/2015	2015	SS10541140661	0	SMALL BUSINESS
KAREN BUTLER	ME EXPRESS REPORTING - MENTAL HEALTH IGF::CT::IGF	\$72,850.00	\$72,850.00	2015	9/30/2015	2015	SS10631150028	0	SMALL BUSINESS
REHABILITATION APPROACH THE	VE EXPRESS REPORTING IGF::CT::IGF	\$72,760.00	\$72,760.00	2015	9/30/2015	2015	SS10631350007	0	SMALL BUSINESS
VERCILLO, AMY E	VE EXPRESS REPORTING IGF::CT::IGF	\$72,739.00	\$72,739.00	2015	9/30/2015	2015	SS11501110065	0	SMALL BUSINESS
WILLIAM A RACK MEDICAL CORP	ME EXPRESS REPORTING - MENTAL HEALTH IGF::CT::IGF	\$72,700.00	\$72,700.00	2015	9/30/2015	2015	SS10881190054	0	SMALL BUSINESS
CATHY SANDERS	VE EXPRESS REPORTING IGF::CT::IGF	\$72,699.69	\$72,699.69	2015	9/30/2015	2015	SS10541140637	0	SMALL BUSINESS
PASIKOWSKI, ELIZABETH	ME EXPRESS REPORTING - MENTAL HEALTH IGF::CT::IGF	\$72,691.48	\$72,691.48	2015	9/30/2015	2015	SS10631150395	0	SMALL BUSINESS

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DEZACK, LINDA L	VE EXPRESS REPORTING IGF::CT::IGF	\$72,666.80	\$72,666.80	2015	9/30/2015	2015	SS10381130219	0	SMALL BUSINESS
PRC VOCATIONAL TESTING CENTER INC	VE EXPRESS REPORTING IGF::CT::IGF	\$72,658.36	\$72,658.36	2015	9/30/2015	2015	SS10781160109	0	SMALL BUSINESS
BASSEM INC.	ME EXPRESS REPORTING - MENTAL HEALTH IGF::CT::IGF	\$72,491.00	\$72,491.00	2015	9/30/2015	2015	SS10541140165	0	SMALL BUSINESS
BENJAMIN CORTIJO JR MD	IGF::CL::IGF REGION 2 MEDICAL CONSULTANTS. REVIEWS BY MEDICAL CONSULTANT OF DISABILITY CLAIM CASE FILES FOR AGENCY DISABILITY PROGRAM.	\$72,485.00	\$72,485.00	2016	5/9/2016	1	SS02164C008	1	SMALL BUSINESS
YARED, THOMAS A MD	IGF::CL::IGF REGION 2 MEDICAL CONSULTANTS. REVIEWS BY MEDICAL CONSULTANT OF DISABILITY CLAIM CASE FILES FOR AGENCY DISABILITY PROGRAM. MODIFICATION TO ADD CASES AND EXTEND THE PERFORMANCE PERIOD.	\$72,485.00	\$72,485.00	2016	6/3/2016	1	SS02164C023	1	SMALL BUSINESS
SUZETTE SKINNER	VE EXPRESS REPORTING IGF::CT::IGF	\$72,411.00	\$72,411.00	2015	9/30/2015	2015	SS10781160015	0	SMALL BUSINESS
TIERSTEN, DAIVD, M.D.	IGF::CL::IGF REGION 2 MEDICAL CONSULTANTS. REVIEWS BY MEDICAL CONSULTANT OF DISABILITY CLAIM CASE FILES FOR AGENCY DISABILITY PROGRAM. MODIFICATION TO INCREASE QUANTITY AND EXTEND PERFORMANCE.	\$72,378.00	\$72,378.00	2015	4/8/2015	10	SS021040026	1	SMALL BUSINESS
BACK TO WORK	ME EXPRESS REPORTING - MENTAL HEALTH IGF::CT::IGF	\$72,373.84	\$72,373.84	2015	9/30/2015	2015	SS10781360005	0	SMALL BUSINESS
FELDMAN, HELENE J.	VE EXPRESS REPORTING IGF::CT::IGF	\$72,275.00	\$72,275.00	2015	9/30/2015	2015	SS10251220006	0	SMALL BUSINESS
NEW LINK SERVICES, LLC	ME EXPRESS REPORTING - MENTAL HEALTH IGF::CT::IGF	\$72,263.32	\$72,263.32	2015	9/30/2015	2015	SS10631150185	0	SMALL BUSINESS
RUIZ, JOSE TADEO P.	IGF::CL::IGF OMA MEDICAL CONSULTANTS. REVIEWS BY MEDICAL CONSULTANT OF DISABILITY CLAIM CASE FILES FOR AGENCY DISABILITY PROGRAM.	\$72,250.00	\$72,250.00	2016	5/31/2016	1	SS00164C038	0	SMALL BUSINESS
WORK & YOU	VE EXPRESS REPORTING IGF::CT::IGF	\$72,128.00	\$72,128.00	2015	9/30/2015	2015	SS10781160207	0	SMALL BUSINESS
MICHAEL BOHNERT MD	IGF::CL::IGF SS01-16-4C003 BOHNERT, MICHAEL CALL ORDER FOR 900 INDEPENDENT DISABILITY CASE REVIEWS FOR THE PERIOD OF PERFORMANCE 04/01/2016 - 03/31/2017. THE RATE OF PAY IS \$80.14 PER CASE, FOR TOTAL FUNDING NEEDS OF \$72,126.	\$72,126.00	\$72,126.00	2016	2/16/2016	1	SS01164C003	0	SMALL BUSINESS
NAOMI M KELLY	IGF::CL::IGF- SS01-16-4C019- KELLY, NAOMI REQUISITION	\$72,126.00	\$72,126.00	2017	10/3/2016	2	SS01164C019	0	SMALL BUSINESS
EXPERT VOCATIONAL SERVICES, LLC	VE EXPRESS REPORTING IGF::CT::IGF	\$72,118.00	\$72,118.00	2015	9/30/2015	2015	SS10381130265	0	SMALL BUSINESS
OSTROWSKI & ASSOC	VE EXPRESS REPORTING IGF::CT::IGF	\$72,026.52	\$72,026.52	2015	9/30/2015	2015	SS10381130187	0	SMALL BUSINESS
WILLIAMS, REBECCA VOCATIONAL CONSULTING SERVICES	VE EXPRESS REPORTING IGF::CT::IGF	\$72,002.00	\$72,002.00	2015	9/30/2015	2015	SS10541140557	0	SMALL BUSINESS
MCKINNEY, JOHN W III CRC CVE CCA	VE EXPRESS REPORTING IGF::CT::IGF	\$71,969.30	\$71,969.30	2015	9/30/2015	2015	SS10541140597	0	SMALL BUSINESS
HERMAN MILLER, INC.	EVANSVILLE, IN RX84 - DESIGN, INSTALLATION AND PRO	\$71,935.30	\$71,935.30	2015	2/6/2015	SS001530255	SS001260003	0	OTHER THAN SMALL BUSINESS
RESOURCE DESIGNS	ME EXPRESS REPORTING - MENTAL HEALTH IGF::CT::IGF	\$71,866.00	\$71,866.00	2015	9/30/2015	2015	SS10631150119	0	SMALL BUSINESS
MCFARLAND CONSULTING, LLC	ME EXPRESS REPORTING - MENTAL HEALTH IGF::CT::IGF	\$71,837.54	\$71,837.54	2015	9/30/2015	2015	SS10631150221	0	SMALL BUSINESS
GAIR, CELINE PAYNE PHD	MEDICAL CONTRACTOR SERVICES - MENTAL CASES CLOSELY ASSOCIATED TO INHERENTLY GOVERNMENTAL FUNCTION IGF::CL::IGF	\$71,758.75	\$71,758.75	2015	1/21/2015	15	SS041040091	1	SMALL BUSINESS
CORTEZ, JENNIFER A	IGF::CL::IGF REGION 2 MEDICAL CONSULTANTS. REVIEWS BY MEDICAL CONSULTANT OF DISABILITY CLAIM CASE FILES FOR AGENCY DISABILITY PROGRAM.	\$71,750.00	\$71,750.00	2015	3/13/2015	5	SS021240005	0	SMALL BUSINESS
WINN, KELLY & ASSOC	VE EXPRESS REPORTING IGF::CT::IGF	\$71,711.00	\$71,711.00	2015	9/30/2015	2015	SS10881190109	0	SMALL BUSINESS
NANCY HARTER	VE EXPRESS REPORTING IGF::CT::IGF	\$71,660.00	\$71,660.00	2015	9/30/2015	2015	SS10381130177	0	SMALL BUSINESS
REHABILITATION SERVICES ASSOC	ME EXPRESS REPORTING - MENTAL HEALTH IGF::CT::IGF	\$71,629.00	\$71,629.00	2015	9/30/2015	2015	SS10631150085	0	SMALL BUSINESS
LLOYD, ROSALIND Y	VE EXPRESS REPORTING IGF::CT::IGF	\$71,622.00	\$71,622.00	2015	9/30/2015	2015	SS10781160339	0	SMALL BUSINESS
FINDORA, JUDITH KATHERYN	VE EXPRESS REPORTING IGF::CT::IGF	\$71,578.00	\$71,578.00	2015	9/30/2015	2015	SS10631350021	0	SMALL BUSINESS
BELL, GERALD I MD	ME EXPRESS REPORTING - MENTAL HEALTH IGF::CT::IGF	\$71,560.00	\$71,560.00	2015	9/30/2015	2015	SS10111100009	0	SMALL BUSINESS
JOHN R MORSE MD INC	ME EXPRESS REPORTING - MENTAL HEALTH IGF::CT::IGF	\$71,560.00	\$71,560.00	2015	9/30/2015	2015	SS10881190048	0	SMALL BUSINESS

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HEALTH & HUMAN SERVICES, NORTH CAROLINA DEPARTMENT OF	IGF::OT::IGF OTHER FUNCTIONS NC RECEIPT OF NON-ELECTRONIC DEATH RECORDS FOR OPTION YEAR III PERIOD OF PERFORMANCE JANUARY 1, 2015 - DECEMBER 31, 2015.	\$71,380.00	\$71,380.00	2015	12/30/2014	4	SS001260049	0	OTHER THAN SMALL BUSINESS
LEAF, LEIF E. PHD	IGF::CL::IGF CLOSELY ASSOCIATED - CALL ORDER FOR IN	\$71,225.00	\$71,225.00	2016	7/7/2016	4	SS07164C011	0	SMALL BUSINESS
ELLIS VOCATIONAL EVALUATION SERVICES IN	VE EXPRESS REPORTING IGF::CT::IGF	\$71,185.84	\$71,185.84	2015	9/30/2015	2015	SS10541140519	0	SMALL BUSINESS
SPENCER, CATHLEEN	VE EXPRESS REPORTING IGF::CT::IGF	\$71,074.00	\$71,074.00	2015	9/30/2015	2015	SS10881490010	0	SMALL BUSINESS
EMW VOCATIONAL CONSULTING, LLC	VE EXPRESS REPORTING IGF::CT::IGF	\$71,056.00	\$71,056.00	2015	9/30/2015	2015	SS10881190027	0	SMALL BUSINESS
RICHMOND, CITY OF	IGF::CT::IGF  CONTRACTOR SHALL PROVIDE SUPERVISION, LABOR, MATERIAL, AND NECESSARY EQUIPMENT TO MAINTAIN THE SEWER AND DRAIN SYSTEMS LOCATED AT THE FRANK HAGEL FEDERAL BUILDING, 1221 NEVIN AVENUE, RICHMOND, CA 94801.	\$71,021.04	\$71,021.04	2016	2/5/2016	SS091651002		0	OTHER THAN SMALL BUSINESS
RUSSELL BOWDEN COUNSELOR	VE EXPRESS REPORTING IGF::CT::IGF	\$71,000.00	\$71,000.00	2015	9/30/2015	2015	SS10781160027	0	SMALL BUSINESS
CONNIE GUILLORY	VE EXPRESS REPORTING IGF::CT::IGF	\$70,911.00	\$70,911.00	2015	9/30/2015	2015	SS10881190209	0	SMALL BUSINESS
STROKER, KELLY	ME EXPRESS REPORTING - MENTAL HEALTH IGF::CT::IGF	\$70,815.25	\$70,815.25	2015	9/30/2015	2015	SS10631150381	0	SMALL BUSINESS
BOWHEAD PROFESSIONAL SOLUTIONS, LLC	IGF::OT::IGF THE SOCIAL SECURITY ADMINISTRATION (SSA) HAS A REQUIREMENT TO FUND TECHNICAL SUPPORT SERVICES SUPPORTING AUTOMATED DATA PROCESSING CAPABILITIES AND RELOCATIONS (MOVES)AT CLAIMS- TAKING FSP SITES. TWO SITES OSLO, NORWAY AND LONDON, ENGLAND WILL RELOCATE(MOVE)FROM THEIR CURRENT LOCATION TO ANOTHER LOCATION FROM DECEMBER 2016 THROUGH APRIL 30, 2017.	\$70,736.98	\$70,736.98	2017	10/21/2016	SS001730013	SS001461008	0	SMALL BUSINESS
ANDREWS, JULIE	VE EXPRESS REPORTING IGF::CT::IGF	\$70,705.00	\$70,705.00	2015	9/30/2015	2015	SS10251120033	0	OTHER THAN SMALL BUSINESS
JUBREY, RENEE	VE EXPRESS REPORTING IGF::CT::IGF	\$70,694.00	\$70,694.00	2015	9/30/2015	2015	SS11501110027	0	SMALL BUSINESS
MAY, ABBE	VE EXPRESS REPORTING IGF::CT::IGF	\$70,661.00	\$70,661.00	2015	9/30/2015	2015	SS10881190093	0	SMALL BUSINESS
VALERIE WILLIAMS	VE EXPRESS REPORTING IGF::CT::IGF	\$70,632.00	\$70,632.00	2015	9/30/2015	2015	SS10881390005	0	SMALL BUSINESS
THOMAS DACHELET	VE EXPRESS REPORTING IGF::CT::IGF	\$70,550.00	\$70,550.00	2015	9/30/2015	2015	SS10881190051	0	SMALL BUSINESS
HILDRE, JEROLD L	VE EXPRESS REPORTING IGF::CT::IGF	\$70,486.00	\$70,486.00	2015	9/30/2015	2015	SS10781160203	0	SMALL BUSINESS
TIERSTEN, DAIVD, M.D.	IGF::CL::IGF REGION 2 MEDICAL CONSULTANTS. REVIEWS BY MEDICAL CONSULTANT OF DISABILITY CLAIM CASE FILES FOR AGENCY DISABILITY PROGRAM. INCREASE CASE REVIEW QUANTITY AND EXTEND PERIOD OF PERFORMANCE.	\$70,414.00	\$70,414.00	2016	6/8/2016	1	SS02164C022	1	SMALL BUSINESS
SMITH, MICHAEL	VE EXPRESS REPORTING IGF::CT::IGF	\$70,350.00	\$70,350.00	2015	9/30/2015	2015	SS10251320021	0	SMALL BUSINESS
MOSLEY, ROBERT A & ASSOCIATES	VE EXPRESS REPORTING IGF::CT::IGF	\$70,328.00	\$70,328.00	2015	9/30/2015	2015	SS10631150019	0	SMALL BUSINESS
JACK E THOMAS	ME EXPRESS REPORTING - MENTAL HEALTH IGF::CT::IGF	\$70,240.00	\$70,240.00	2015	9/30/2015	2015	SS10631150004	0	SMALL BUSINESS
R. EVANS PROFESSIONAL DEVELOPMENT CONSULTATION, INC.	VE EXPRESS REPORTING IGF::CT::IGF	\$70,160.97	\$70,160.97	2015	9/30/2015	2015	SS10541140551	0	SMALL BUSINESS
SCHMITTER, ERIC	VE EXPRESS REPORTING IGF::CT::IGF	\$70,150.00	\$70,150.00	2015	9/30/2015	2015	SS10881190162	0	OTHER THAN SMALL BUSINESS
JULIA A RUSSELL	VE EXPRESS REPORTING IGF::CT::IGF	\$70,111.91	\$70,111.91	2015	9/30/2015	2015	SS10541140277	0	SMALL BUSINESS
JAMES BREEN	ME EXPRESS REPORTING - MENTAL HEALTH IGF::CT::IGF	\$70,104.00	\$70,104.00	2015	9/30/2015	2015	SS10631150061	0	SMALL BUSINESS
DW STRATEGIC SOLUTIONS LLC	IGF::CL::IGF  REGION 9 MEDICAL CONSULTANTS. REVIEWS BY MEDICAL CONSULTANT OF DISABILITY CLAIM CASE FILES FOR AGENCY DISABILITY PROGRAM. CALL ORDER TO AWARD DEBORAH WAFER 840 CASES.	\$70,056.00	\$70,056.00	2016	2/29/2016	1	SS09164C055	0	SMALL BUSINESS



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MALCOLM DRUSKIN MD	IGF::CL::IGF OMA MEDICAL CONSULTANTS. REVIEWS BY MEDICAL CONSULTANT OF DISABILITY CLAIM CASE FILES FOR AGENCY DISABILITY PROGRAM.	\$70,000.00	\$70,000.00	2016	5/27/2016	1	SS00164C011	0	SMALL BUSINESS
UGI PENN NATURAL GAS, INC.	IGF::OT::IGF TO PROVIDE NATURAL GAS UTILITY SERVICE	\$70,000.00	\$70,000.00	2016	7/21/2016	SS001650193		0	SMALL BUSINESS
CHARLES E LAWRENCE PHD PC	IGF::CL::IGF OMA MEDICAL CONSULTANTS. REVIEWS BY MEDICAL CONSULTANT OF DISABILITY CLAIM CASE FILES FOR AGENCY DISABILITY PROGRAM.	\$69,975.00	\$69,975.00	2016	5/25/2016	1	SS00164C029	0	SMALL BUSINESS
WALKER, GEORGE	IGF::CL::IGF REQUEST FOR NEW CALL ORDER FOR GEORGE WALKER, MD	\$69,968.25	\$69,968.25	2017	11/7/2016	5	SS04164C025	0	SMALL BUSINESS
ARNOLD OSTROW MD INC	ME EXPRESS REPORTING - MENTAL HEALTH IGF::CT::IGF	\$69,890.00	\$69,890.00	2015	9/30/2015	2015	SS10881190130	0	SMALL BUSINESS
SAVAGE, HUGH R MD	ME EXPRESS REPORTING - MENTAL HEALTH IGF::CT::IGF	\$69,880.00	\$69,880.00	2015	9/30/2015	2015	SS10631150262	0	SMALL BUSINESS
SAI R NIMMAGADDA	REGION V MEDICAL CONSULTANT SERVICES FOR THE SOCIAL SECURITY ADMINISTRATION. REVIEWS BY MEDICAL CONSULTANT OF DISABILITY CLAIM CASE FILES FOR AGENCY DISABILITY PROGRAM. IGF::CL::IGF	\$69,798.60	\$69,798.60	2016	6/30/2016	2	SS05164C020	0	SMALL BUSINESS
GAWO MD, YACOB	REGION V MEDICAL CONSULTANT SERVICES FOR THE SOCIAL SECURITY ADMINISTRATION. REVIEWS BY MEDICAL CONSULTANT OF DISABILITY CLAIM CASE FILES FOR AGENCY DISABILITY PROGRAM. AWARDING DR. YACOB GAWO INDEPENDENT CASE REVIEWS. IGF::CL::IGF	\$69,798.60	\$69,798.60	2016	6/24/2016	2	SS05164C011	0	SMALL BUSINESS
MARK GILSON, PH.D., P.C.	MEDICAL CONTRACTOR SERVICES - MENTAL CASES CLOSELY ASSOCIATED TO INHERENTLY GOVERNMENTAL FUNCTION IGF::CL::IGF	\$69,708.50	\$69,708.50	2015	6/9/2015	14	SS041140063	0	SMALL BUSINESS
MELISSA NEEL VOCATIONAL COUNSELOR	VE EXPRESS REPORTING IGF::CT::IGF	\$69,608.39	\$69,608.39	2015	9/30/2015	2015	SS10541140529	0	SMALL BUSINESS
RAYMOND CESTAR	VE EXPRESS REPORTING IGF::CT::IGF	\$69,601.00	\$69,601.00	2015	9/30/2015	2015	SS10251120007	0	SMALL BUSINESS
EMPLOYMENT DYNAMICS INC	VE EXPRESS REPORTING IGF::CT::IGF	\$69,446.00	\$69,446.00	2015	9/30/2015	2015	SS10381130141	0	SMALL BUSINESS
KING, NICOLE B	VE EXPRESS REPORTING IGF::CT::IGF	\$69,435.29	\$69,435.29	2015	9/30/2015	2015	SS10781160057	0	SMALL BUSINESS
MICHAEL A, PHD KLEIN	ME EXPRESS REPORTING - MENTAL HEALTH IGF::CT::IGF	\$69,430.00	\$69,430.00	2015	9/30/2015	2015	SS10631150251	0	SMALL BUSINESS
LESSNE, DEVIN	VE EXPRESS REPORTING IGF::CT::IGF	\$69,427.93	\$69,427.93	2015	9/30/2015	2015	SS10541140729	0	OTHER THAN SMALL BUSINESS
GHAZI, DARIUS	ME EXPRESS REPORTING - MENTAL HEALTH IGF::CT::IGF	\$69,390.00	\$69,390.00	2015	9/30/2015	2015	SS10541140068	0	SMALL BUSINESS
SCHER, ROBIN S	VE EXPRESS REPORTING IGF::CT::IGF	\$69,353.00	\$69,353.00	2015	9/30/2015	2015	SS10881190159	0	SMALL BUSINESS
HERMAN MILLER, INC.	CHICAGO, IL ODAR #AX26 THE OFFICE IS ADDING 7 NEW	\$69,278.24	\$69,278.24	2015	4/29/2015	SS001530452	SS001260003	0	OTHER THAN SMALL BUSINESS
HOWARD T HORSLEY JR MD PC	IGF::CL::IGF CLOSELY ASSOCIATED - INDEPENDENT CAS	\$69,160.00	\$69,160.00	2016	6/23/2016	2	SS08164C009	0	SMALL BUSINESS
UNDERWOOD & ASSOCIATES	VE EXPRESS REPORTING IGF::CT::IGF	\$69,112.00	\$69,112.00	2015	9/30/2015	2015	SS10541140623	0	SMALL BUSINESS
KLAMM, WENDY P	VE EXPRESS REPORTING IGF::CT::IGF	\$69,038.95	\$69,038.95	2015	9/30/2015	2015	SS10781160161	0	SMALL BUSINESS
ANAYA, JAVIER	ME EXPRESS REPORTING - MENTAL HEALTH IGF::CT::IGF	\$69,030.00	\$69,030.00	2015	9/30/2015	2015	SS10251320010	0	SMALL BUSINESS
MICHAEL BOHNERT MD	IGF::CL::IGF REGION 1 MEDICAL CONSULTANTS. REVIEWS BY MEDICAL CONSULTANT OF DISABILITY CLAIM CASE FILES FOR AGENCY DISABILITY PROGRAM. THE PURPOSE OF THIS BPA CALL IS TO REQUEST 850 CASES AND 20 HOURS.	\$68,996.50	\$68,996.50	2015	4/3/2015	8	SS011140026	0	SMALL BUSINESS
HOWELL VOCATIONAL SERVICES INC	VE EXPRESS REPORTING IGF::CT::IGF	\$68,963.00	\$68,963.00	2015	9/30/2015	2015	SS10541140301	0	SMALL BUSINESS
HECTOR PUIG	VE EXPRESS REPORTING IGF::CT::IGF	\$68,922.00	\$68,922.00	2015	9/30/2015	2015	SS10251120055	0	SMALL BUSINESS
MCKNIGHT, THOMAS PHD	VE EXPRESS REPORTING IGF::CT::IGF	\$68,890.00	\$68,890.00	2015	9/30/2015	2015	SS11521100022	0	SMALL BUSINESS
MCWILLIAMS JUNKO	IGF::CL::IGF OMA MEDICAL CONSULTANTS. REVIEWS BY MEDICAL CONSULTANT OF DISABILITY CLAIM CASE FILES FOR AGENCY DISABILITY PROGRAM. ADDING 800 CASE REVIEWS.	\$68,800.00	\$68,800.00	2016	9/12/2016	1	SS00164C033	1	SMALL BUSINESS
DISABILITY INNOVATIONS, LTD.	ME EXPRESS REPORTING - MENTAL HEALTH IGF::CT::IGF	\$68,706.00	\$68,706.00	2015	9/30/2015	2015	SS10631150083	0	SMALL BUSINESS



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SCHWARTZ, MILFORD	IGF::CL::IGF MEDICAL CONSULTANT SERVICES- REGION 5 AWARDING DR. MILFORD SCHWARTZ INDEPENDENT CASE REVIEWS AGAINST SS05-16-4C023	\$68,430.00	\$68,430.00	2016	3/24/2016	1	SS05164C023	0	SMALL BUSINESS
KRAVITZ, LARRY NEIL, THOMAS C.	THIS IS TO FUND A NEW CALL ORDER FOR INDEPENDENT CASE REVIEWS AGAINST SS05-16-4C015, CALL ORDER 1. DR LARRY KRAVITZ PH.D. IGF::CT::IGF VE EXPRESS REPORTING IGF::CT::IGF	\$68,430.00 \$68,415.00	\$68,430.00 \$68,415.00	2016 2015	3/23/2016 9/30/2015	1 2015	SS05164C015 SS10541140233	0	SMALL BUSINESS SMALL BUSINESS
JOSE J RABELO MD AMERICAN SERVICE NETWORK CORPORATION WELCH, MACK PEAK SOLUTIONS VOCATIONAL SERVICES, LLC	IGF::CL::IGF REGION 2 MEDICAL CONSULTANTS. REVIEWS BY MEDICAL CONSULTANT OF DISABILITY CLAIM CASE FILES FOR AGENCY DISABILITY PROGRAM. IGF::CT::IGF EEO PROGRAM CONSULTANT SERVICES FOR VE EXPRESS REPORTING IGF::CT::IGF VE EXPRESS REPORTING IGF::CT::IGF	\$68,343.00 \$68,227.20 \$68,225.00 \$68,212.00	\$68,343.00 \$68,227.20 \$68,225.00 \$68,212.00	2016 2016 2015 2015	4/7/2016 12/29/2015 9/30/2015 9/30/2015	1 SS001550172 2015 2015	SS02164C019 SS10781160299 SS10251320001	1 1 0 0	SMALL BUSINESS SMALL BUSINESS SMALL BUSINESS SMALL BUSINESS
VIDEK INC	MAINTENANCE OF VIDEK 8600 TRACK AND TRACE SYSTEM IGF::OT::IGF	\$68,120.00	\$68,120.00	2016	5/12/2016	SS001650134		0	SMALL BUSINESS
MOORE, YONDELL SEMERDJIAN, RONALD A	IGF::CL::IGF MOORE, Y - CALL ORDER - CASES ME EXPRESS REPORTING - MENTAL HEALTH IGF::CT::IGF	\$68,085.00 \$67,990.00	\$68,085.00 \$67,990.00	2015 2015	5/29/2015 9/30/2015	15 2015	SS061140019 SS10631150246	0	SMALL BUSINESS SMALL BUSINESS
BARRICKS, MICHAEL E.MD JOHN R FINCH ADAMS, JAMES B & ASSOC INC HUMES, DAVID H	IGF::CL::IGF BLANKET PURCHASE AGREEMENTS FOR CONTRACTORS TO PROVIDE REGIONAL MEDICAL CONSULTANT SERVICES FOR THE SOCIAL SECURITY ADMINISTRATION. REVIEWS BY MEDICAL CONSULTANT OF DISABILITY CLAIM CASE FILES FOR AGENCY DISABILITY PROGRAM. MODIFICATION TO ADD CASES AND EXTEND THE PERIOD OF PERFORMANCE. ME EXPRESS REPORTING - MENTAL HEALTH IGF::CT::IGF VE EXPRESS REPORTING IGF::CT::IGF VE EXPRESS REPORTING IGF::CT::IGF	\$67,971.00 \$67,911.00 \$67,787.04 \$67,785.00	\$67,971.00 \$67,911.00 \$67,787.04 \$67,785.00	2016 2015 2015 2015	7/31/2016 9/30/2015 9/30/2015 9/30/2015	1 2015 2015 2015	SS09164C029 SS10631150157 SS10541140217 SS10381130263	1 0 0 0	SMALL BUSINESS OTHER THAN SMALL BUSINESS SMALL BUSINESS SMALL BUSINESS
PHILADELPHIA, CITY OF	AWARD FOR THE DISTRIBUTION OF NATURAL GAS FOR THE MATSSC IGF::CT::IGF	\$67,711.00	\$67,711.00	2015	6/17/2015	SS031530004	GS00P08BSD0546	0	OTHER THAN SMALL BUSINESS
DISABILITY CONSULTANTS, LLC GRISCOM JOHN	MEDICAL CONTRACTOR SERVICES - MENTAL CASES CLOSELY ASSOCIATED TO INHERENTLY GOVERNMENTAL FUNCTION IGF::CL::IGF ME EXPRESS REPORTING - MENTAL HEALTH IGF::CT::IGF	\$67,658.25 \$67,640.00	\$67,658.25 \$67,640.00	2015 2015	3/4/2015 9/30/2015	33 2015	SS041140025 SS10541140136	1 0	SMALL BUSINESS SMALL BUSINESS
RICHMOND, CITY OF COX, LISA AMY H LEOPOLD A-T VOCATIONAL SERVI THE ARC OF BALTIMORE INCORPORATED (1428) NERO INC CASTELLANA ASSOCIATES INC MAS, LUIS PULMONARY ASSOCIATES OF THE SOUTHEAST, P.C.	BUILDING SANITARY SEWER/STORM FEES IGF::CT::IGF VE EXPRESS REPORTING IGF::CT::IGF VE EXPRESS REPORTING IGF::CT::IGF VE EXPRESS REPORTING IGF::CT::IGF LANDSCAPING AND RENOVATION: TREE AND SHRUB REN RENEWAL ON NERO 9 SOFTWARE LICENSE MAINTENANCE VE EXPRESS REPORTING IGF::CT::IGF VE EXPRESS REPORTING IGF::CT::IGF ME EXPRESS REPORTING - MENTAL HEALTH IGF::CT::IGF	\$67,455.00 \$67,441.04 \$67,407.00 \$67,318.86 \$67,294.17 \$86,321.09 \$67,261.00 \$67,242.21 \$67,200.00	\$67,455.00 \$67,441.04 \$67,407.00 \$67,318.86 \$67,294.17 \$67,263.27 \$67,261.00 \$67,242.21 \$67,200.00	2015 2015 2015 2015 2016 2017 2015 2015 2015	1/26/2015 9/30/2015 9/30/2015 9/30/2015 9/20/2016 11/3/2016 9/30/2015 9/30/2015 9/30/2015	SS091551004 2015 2015 2015 SS000860012 SS001560003 2015 2015 2015	SS10781160117 SS10251120043 SS11521100111 SS10881390009 SS10541140120	0 0 0 0 51 2 0 0 0	OTHER THAN SMALL BUSINESS SMALL BUSINESS SMALL BUSINESS SMALL BUSINESS OTHER THAN SMALL BUSINESS SMALL BUSINESS SMALL BUSINESS SMALL BUSINESS SMALL BUSINESS

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BIDDISON, JAMES MD	IGF::CL::IGF OMA MEDICAL CONSULTANTS. REVIEWS BY MEDICAL CONSULTANT OF DISABILITY CLAIM CASE FILES FOR AGENCY DISABILITY PROGRAM.	\$67,175.00	\$67,175.00	2016	5/31/2016	1	SS00164C003	0	SMALL BUSINESS
HERMAN MILLER, INC.	ALBUQUERQUE NM ODAR #YX12 INSTALLATION OF 11 E	\$67,154.74	\$67,154.74	2015	5/20/2015	SS001530521	SS001260003	0	OTHER THAN SMALL BUSINESS
ADINA P LEVITON PHD CRC	VE EXPRESS REPORTING IGF::CT::IGF	\$67,149.23	\$67,149.23	2015	9/30/2015	2015	SS10381130081	0	SMALL BUSINESS
NEW ABILITIES	VE EXPRESS REPORTING IGF::CT::IGF	\$67,043.00	\$67,043.00	2015	9/30/2015	2015	SS10381130171	0	SMALL BUSINESS
NORTH FLORIDA VOCATIONAL CASE MANAGEMENT SERVICES	VE EXPRESS REPORTING IGF::CT::IGF	\$67,028.50	\$67,028.50	2015	9/30/2015	2015	SS10541140577	0	SMALL BUSINESS
BERKLEY, LYNDA	VE EXPRESS REPORTING IGF::CT::IGF	\$66,995.00	\$66,995.00	2015	9/30/2015	2015	SS10881190085	0	SMALL BUSINESS
FLYNN, JAMES D	VE EXPRESS REPORTING IGF::CT::IGF	\$66,819.07	\$66,819.07	2015	9/30/2015	2015	SS10541140249	0	SMALL BUSINESS
BROWN, CORY A	IGF::CL::IGF  REGION 9 MEDICAL CONSULTANTS. REVIEWS BY MEDICAL CONSULTANT OF DISABILITY CLAIM CASE FILES FOR AGENCY DISABILITY PROGRAM. CALL ORDER TO AWARD CORY BROWN 800 CASES AND 4 NON-CASE HOURS.	\$66,784.00	\$66,784.00	2016	2/29/2016	1	SS09164C033	0	SMALL BUSINESS
CORTEZ, JENNIFER A	IGF::CL::IGF MEDICAL CONSULTANT TO CONDUCT INDEPENDENT CASE REVIEWS.	\$66,600.00	\$66,600.00	2016	7/13/2016	6	SS021240005	0	SMALL BUSINESS
HENSEL PHELPS SERVICES LLC	ONYX WORKSTATION IGF::CT::IGF	\$66,582.00	\$66,582.00	2015	9/8/2015	SS001530816	SS001461106	0	OTHER THAN SMALL BUSINESS
DRUMWRIGHT PHD, BONNIE	VE EXPRESS REPORTING IGF::CT::IGF	\$66,564.00	\$66,564.00	2015	9/30/2015	2015	SS10881190063	0	SMALL BUSINESS
KOFAX, INC.	MAINTAIN KOFAX MARKVIEW INVOICING SOFTWARE	\$66,561.80	\$66,561.80	2015	12/18/2014	SS001550048		0	SMALL BUSINESS
MCWATTERS, JACK	OMA MEDICAL CONSULTANTS. REVIEWS BY MEDICAL CONSULTANT OF DISABILITY CLAIM CASE FILES FOR AGENCY DISABILITY PROGRAM. AWARDING DR. MCWATTERS INDEPENDENT CASE REVIEWS AND NON-CASE SERVICES. IGF::CL::IGF	\$66,550.00	\$66,550.00	2016	5/31/2016	1	SS00164C066	0	SMALL BUSINESS
UGI PENN NATURAL GAS, INC.	IGF::CT::IGF DELIVERY OF GAS SERVICE TO WBD0C 1150	\$66,500.00	\$66,500.00	2015	7/29/2015	SS001550223		0	OTHER THAN SMALL BUSINESS
LAYTON, KENT	VE EXPRESS REPORTING IGF::CT::IGF	\$66,500.00	\$66,500.00	2015	9/30/2015	2015	SS10881190140	0	SMALL BUSINESS
BORDEN, BETTY L.	VE EXPRESS REPORTING IGF::CT::IGF	\$66,480.00	\$66,480.00	2015	9/30/2015	2015	SS10881190058	0	SMALL BUSINESS
JAMES L GRECO MD	REGION V MEDICAL CONSULTANT SERVICES FOR THE SOCIAL SECURITY ADMINISTRATION. REVIEWS BY MEDICAL CONSULTANT OF DISABILITY CLAIM CASE FILES FOR AGENCY DISABILITY PROGRAM. AWARDING DR. JAMES GRECO FOR MEDICAL ADVISOR SERVICES. IGF::CL::IGF	\$66,451.20	\$66,451.20	2016	6/30/2016	4	SS05164C028	0	SMALL BUSINESS
KUMAR SWAMI MD	IGF::CL::IGF RMC TO CONDUCT INDEPENDENT CASE REVIEWS. REVIEWS BY MEDICAL CONSULTANT OF DISABILITY CLAIM CASE FILES FOR AGENCY DISABILITY PROGRESS	\$66,352.00	\$66,352.00	2016	7/13/2016	3	SS03154C015	0	SMALL BUSINESS
SURVIVAL SKILLS FOR 21ST CENTU	VE EXPRESS REPORTING IGF::CT::IGF	\$66,270.84	\$66,270.84	2015	9/30/2015	2015	SS10541140483	0	SMALL BUSINESS
MCLAUGHLIN CONSULTANTS, LLC	VE EXPRESS REPORTING IGF::CT::IGF	\$66,211.62	\$66,211.62	2015	9/30/2015	2015	SS10781460014	0	SMALL BUSINESS
HAYWARD, NANCY	VE EXPRESS REPORTING IGF::CT::IGF	\$66,182.26	\$66,182.26	2015	9/30/2015	2015	SS10541140295	0	SMALL BUSINESS
BROWDE REHABILITATION CONSULTING, LLC	ME EXPRESS REPORTING - MENTAL HEALTH IGF::CT::IGF	\$66,139.25	\$66,139.25	2015	9/30/2015	2015	SS10631150371	0	SMALL BUSINESS
VIDEK INC	IGF::OT::IGF OTHER FUNCTIONS TRACK AND TRACE SYSTEM MAINTENANCE	\$66,130.00	\$66,130.00	2015	9/16/2015	SS001550292		0	SMALL BUSINESS
PRESTON, BERNARD	VE EXPRESS REPORTING IGF::CT::IGF	\$66,079.00	\$66,079.00	2015	9/30/2015	2015	SS10881190035	0	SMALL BUSINESS
DRISCOLL, MICHAEL	VE EXPRESS REPORTING IGF::CT::IGF	\$66,069.06	\$66,069.06	2015	9/30/2015	2015	SS10781160241	0	SMALL BUSINESS
CONSTANCE R. BROWN, LLC	ME EXPRESS REPORTING - MENTAL HEALTH IGF::CT::IGF	\$66,029.00	\$66,029.00	2015	9/30/2015	2015	SS10631150067	0	SMALL BUSINESS
KLEPPEL, JUDY MD PH	IGF::CL::IGF RMC TO CONDUCT INDEPENDENT CASE REVIEWS. REVIEWS BY MEDICAL CONSULTANT OF DISABILITY CLAIM CASE FILES FOR AGENCY DISABILITY PROGRESS	\$66,026.80	\$66,026.80	2016	7/13/2016	4	SS03154C010	0	SMALL BUSINESS

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HEALTH, TENNESSEE DEPT OF	IGF::CL::IGF CLOSELY ASSOCIATED TN SS00-12-60056 ELECTRONIC DEATH REGISTRATION DELIVERY ORDER. 75,000 EDR RECORDS TOTAL DELIVERY ORDER \$66,000.00. PERIOD OF PERFORMANCE 1/01/2016 - 12/31/2016.	\$66,000.00	\$66,000.00	2016	12/22/2015	5	SS001260056	0	OTHER THAN SMALL BUSINESS
KATHRYN A ATHA	VE EXPRESS REPORTING IGF::CT::IGF	\$65,803.00	\$65,803.00	2015	9/30/2015	2015	SS10881190189	0	SMALL BUSINESS
MICROSOFT CORPORATION SITZ IN REDMOND CORPORATION	IGF::OT::IGF  MODIFICATION 1 TO TASK ORDER 18 TO CONTRACT SS00-13-60014. MICROSOFT WILL PROVIDE ENGINEERING AND CONSULTING SERVICES FOR THE OFFICE OF RETIREMENT AND DISABILITY POLICY. THE HOURS INITIALLY ORDERED WERE EXHAUSTED AND ADDITIONAL HOURS ARE BEING ORDERED TO COMPLETE THE REQUIRED TASK UNDER THE EXISTING PERIOD OF PERFORMANCE.	\$65,750.00	\$65,750.00	2015	8/20/2015	18	SS001360014	1	OTHER THAN SMALL BUSINESS
POLLACK, MARGARET PHD	IGF::CL::IGF  REGION 9 MEDICAL CONSULTANTS. REVIEWS BY MEDICAL CONSULTANT OF DISABILITY CLAIM CASE FILES FOR AGENCY DISABILITY PROGRAM. CALL ORDER TO AWARD MARGARET POLLACK 800 CASES AND 4 NON- CASE HOURS.	\$65,745.08	\$65,745.08	2016	2/29/2016	1	SS09164C050	0	SMALL BUSINESS
MICHAEL COLANDREA	REGION V MEDICAL CONSULTANT SERVICES FOR THE SOCIAL SECURITY ADMINISTRATION. REVIEWS BY MEDICAL CONSULTANT OF DISABILITY CLAIM CASE FILES FOR AGENCY DISABILITY PROGRAM. AWARDDING DR. MICHAEL COLANDREA INDEPENDENT CASE REVIEWS. IGF::CL::IGF	\$65,692.80	\$65,692.80	2016	6/28/2016	2	SS05164C031	0	SMALL BUSINESS
HAMERSMA PHD, RICHARD	THIS IS TO FUND A NEW CALL ORDER FOR INDEPENDENT	\$65,692.80	\$65,692.80	2016	3/23/2016	1	SS05164C012	0	SMALL BUSINESS
DUONG, BICH THUY, MD	IGF::CL::IGF OMA MEDICAL CONSULTANTS. REVIEWS BY MEDICAL CONSULTANT OF DISABILITY CLAIM CASE FILES FOR AGENCY DISABILITY PROGRAM.	\$65,675.00	\$65,675.00	2016	5/31/2016	1	SS00164C012	0	SMALL BUSINESS
THOMAS, SUSAN E	VE EXPRESS REPORTING IGF::CT::IGF	\$65,658.60	\$65,658.60	2015	9/30/2015	2015	SS10541140695	0	SMALL BUSINESS
BLUSIEWICZ, CATHY PHD	MEDICAL CONSULTANT SERVICES - MENTAL CASES CLOSELY ASSOCIATED TO INHERENTLY GOVERNMENTAL FUNCTION IGF::CL::IGF	\$65,608.00	\$65,608.00	2015	3/4/2015	8	SS041140067	1	SMALL BUSINESS
RICHARD T THIO MD	MEDICAL CONSULTANT SERVICES - PHYSICAL CASES CLOSELY ASSOCIATED TO INHERENTLY GOVERNMENTAL FUNCTION IGF::CL::IGF FOR CLOSELY ASSOCIATED	\$65,608.00	\$65,608.00	2015	6/23/2015	17	SS041140058	0	SMALL BUSINESS
KNOTT MD, HURLEY W	MEDICAL CONTRACTOR SERVICES - PHYSICAL CASES CLOSELY ASSOCIATED TO INHERENTLY GOVERNMENTAL FUNCTION IGF::CL::IGF FOR CLOSELY ASSOCIATED	\$65,608.00	\$65,608.00	2015	3/3/2015	11	SS041140028	1	SMALL BUSINESS
LARRY V CALDWELL MD	MEDICAL CONTRACTOR SERVICES - PHYSICAL CASES CLOSELY ASSOCIATED TO INHERENTLY GOVERNMENTAL FUNCTION IGF::CL::IGF	\$65,608.00	\$65,608.00	2015	6/22/2015	18	SS041040096	0	SMALL BUSINESS
RUTH ANN LYMAN, PH.D., LLC	MEDICAL CONTRACTOR SERVICES - PYSCHOLOGY IGF::CL::IGF	\$65,608.00	\$65,608.00	2015	6/23/2015	15	SS041140024	0	SMALL BUSINESS
DARRELL TAYLOR	ME EXPRESS REPORTING - MENTAL HEALTH IGF::CT::IGF	\$65,504.00	\$65,504.00	2015	9/30/2015	2015	SS10631150189	0	SMALL BUSINESS

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JAMES EARTHART	VE EXPRESS REPORTING IGF::CT::IGF	\$65,493.00	\$65,493.00	2015	9/30/2015	2015	SS10381130151	0	SMALL BUSINESS
WILSON, CHRISTY	VE EXPRESS REPORTING IGF::CT::IGF	\$65,443.00	\$65,443.00	2015	9/30/2015	2015	SS10781160231	0	SMALL BUSINESS
LAYNE MD PA, EDWARD D	OMA MEDICAL CONSULTANTS. REVIEWS BY MEDICAL CONSULTANT OF DISABILITY CLAIM CASE FILES FOR AGENCY DISABILITY PROGRAM. AWARDING DR. LAYNE INDEPENDENT CASE REVIEWS AND NON-CASE SERVICES. IGF::CL::IGF	\$65,400.00	\$65,400.00	2016	5/31/2016	1	SS00164C064	0	SMALL BUSINESS
LATTO, LOWEL	VE EXPRESS REPORTING IGF::CT::IGF	\$65,349.49	\$65,349.49	2015	9/30/2015	2015	SS10541140683	0	SMALL BUSINESS
CRA INTERNATIONAL, INC.	IGF::OT::IGF MODIFICATION TO OBLIGATE ADDITIONAL FUNDING FOR EXPERT WITNESS SERVICES TO LITIGATE A CLASS ACTION BEFORE THE EEOC	\$65,245.00	\$65,245.00	2016	11/25/2015	SS001560036		4	OTHER THAN SMALL BUSINESS
KATHRYN MOONEY	VE EXPRESS REPORTING IGF::CT::IGF	\$65,197.40	\$65,197.40	2015	9/30/2015	2015	SS10541140199	0	SMALL BUSINESS
LEONARD A SIMPSON DR	IGF::CL::IGF  REGION 9 MEDICAL CONSULTANTS. REVIEWS BY MEDICAL CONSULTANT OF DISABILITY CLAIM CASE FILES FOR AGENCY DISABILITY PROGRAM. CALL ORDER TO AWARD LEONARD SIMPSON 750 CASES AND 25 NON-CASE HOURS.	\$64,965.75	\$64,965.75	2016	2/29/2016	1	SS09164C053	0	SMALL BUSINESS
ARDOIN CONSULTING CORPORATION	VE EXPRESS REPORTING IGF::CT::IGF	\$64,950.53	\$64,950.53	2015	9/30/2015	2015	SS10781160279	0	SMALL BUSINESS
HEIMAN, THOMAS H	VE EXPRESS REPORTING IGF::CT::IGF	\$64,852.00	\$64,852.00	2015	9/30/2015	2015	SS10631150451	0	SMALL BUSINESS
JOHN M DUSAY MD A MEDICAL CORPORATION	ME EXPRESS REPORTING - MENTAL HEALTH IGF::CT::IGF	\$64,810.00	\$64,810.00	2015	9/30/2015	2015	SS10881190120	0	OTHER THAN SMALL BUSINESS
WELDON AND ASSOCIATES, INC.	VE EXPRESS REPORTING IGF::CT::IGF	\$64,793.00	\$64,793.00	2015	9/30/2015	2015	SS10541140565	0	SMALL BUSINESS
SARNO, JAMES D	VE EXPRESS REPORTING IGF::CT::IGF	\$64,685.40	\$64,685.40	2015	9/30/2015	2015	SS11501110051	0	SMALL BUSINESS
EDDY'S ENTERTAINMENT, INC.	VE EXPRESS REPORTING IGF::CT::IGF	\$64,595.95	\$64,595.95	2015	9/30/2015	2015	SS10381130143	0	SMALL BUSINESS
HERMAN MILLER, INC.	ST GEORGE, UT RA07 DESIGN, INSTALL, ESTIMATED PRO	\$64,513.29	\$64,513.29	2015	3/30/2015	SS001530355	SS001260003	0	OTHER THAN SMALL BUSINESS
HEALTH, TENNESSEE DEPT OF	IGF::OT::IGF OTHER FUNCTIONS TN RECEIPT OF NON-ELECTRONIC DEATH RECORDS FOR OPTION YEAR III PERIOD OF PERFORMANCE JANUARY 1, 2015 - DECEMBER 31, 2015.	\$64,500.00	\$64,500.00	2015	12/22/2014	4	SS001260056	0	OTHER THAN SMALL BUSINESS
MOORE, JAMES ELTON	VE EXPRESS REPORTING IGF::CT::IGF	\$64,338.98	\$64,338.98	2015	9/30/2015	2015	SS10541140299	0	SMALL BUSINESS
WELLS & ASSOCIATES	VE EXPRESS REPORTING IGF::CT::IGF	\$64,316.02	\$64,316.02	2015	9/30/2015	2015	SS10381130045	0	SMALL BUSINESS
CONNIE OBRIEN	VE EXPRESS REPORTING IGF::CT::IGF	\$64,193.72	\$64,193.72	2015	9/30/2015	2015	SS10631350005	0	SMALL BUSINESS
IMR CONSULTANTS INC	ME EXPRESS REPORTING - MENTAL HEALTH IGF::CT::IGF	\$64,187.40	\$64,187.40	2015	9/30/2015	2015	SS10381130009	0	SMALL BUSINESS
ERIC PRUITT	ME EXPRESS REPORTING - MENTAL HEALTH IGF::CT::IGF	\$64,150.85	\$64,150.85	2015	9/30/2015	2015	SS10631150391	0	SMALL BUSINESS
OSVALDO FULCO	ME EXPRESS REPORTING - MENTAL HEALTH IGF::CT::IGF	\$64,150.00	\$64,150.00	2015	9/30/2015	2015	SS10251120026	0	SMALL BUSINESS
REED, THOMAS C	VE EXPRESS REPORTING IGF::CT::IGF	\$64,122.00	\$64,122.00	2015	9/30/2015	2015	SS10881190243	0	SMALL BUSINESS
SALA, ALINA	VE EXPRESS REPORTING IGF::CT::IGF	\$64,055.00	\$64,055.00	2015	9/30/2015	2015	SS10881190005	0	SMALL BUSINESS
BENTLIF, PHILIP	ME EXPRESS REPORTING - MENTAL HEALTH IGF::CT::IGF	\$64,020.00	\$64,020.00	2015	9/30/2015	2015	SS10781160142	0	SMALL BUSINESS
BERGMANN-HARMS, ELIZABETH	IGF::CL::IGF CLOSELY ASSOCIATED - CALL ORDER FOR IT	\$64,000.00	\$64,000.00	2016	6/29/2016	3	SS07164C002	0	SMALL BUSINESS
REHABILITATION CONSULTING INC.	VE EXPRESS REPORTING IGF::CT::IGF	\$63,958.77	\$63,958.77	2015	9/30/2015	2015	SS10541140285	0	SMALL BUSINESS
SOUTHEAST VOCATIONAL SERVICES	VE EXPRESS REPORTING IGF::CT::IGF	\$63,953.50	\$63,953.50	2015	9/30/2015	2015	SS10541140527	0	SMALL BUSINESS
DANIEL R MALONE	IGF::CL::IGF OMA MEDICAL CONSULTANTS. REVIEWS BY MEDICAL CONSULTANT OF DISABILITY CLAIM CASE FILES FOR AGENCY DISABILITY PROGRAM. ADDING NON-CASE SERVICES AND INDEPENDENT CASE REVIEWS.	\$63,950.00	\$63,950.00	2016	8/12/2016	1	SS00164C065	1	SMALL BUSINESS
HARRIS VOCATIONAL SERVICES	VE EXPRESS REPORTING IGF::CT::IGF	\$63,860.00	\$63,860.00	2015	9/30/2015	2015	SS10631150017	0	SMALL BUSINESS
COLEMAN, GEORGE	ME EXPRESS REPORTING - MENTAL HEALTH IGF::CT::IGF	\$63,773.24	\$63,773.24	2015	9/30/2015	2015	SS10631150377	0	SMALL BUSINESS
LEVINE MD, ALLAN	ME EXPRESS REPORTING - MENTAL HEALTH IGF::CT::IGF	\$63,720.00	\$63,720.00	2015	9/30/2015	2015	SS10541140048	0	SMALL BUSINESS
JANE HAILE	VE EXPRESS REPORTING IGF::CT::IGF	\$63,686.00	\$63,686.00	2015	9/30/2015	2015	SS10881190061	0	SMALL BUSINESS
GUPTA, SHANKER MD	IGF::CL::IGF OMA MEDICAL CONSULTANTS. REVIEWS BY MEDICAL CONSULTANT OF DISABILITY CLAIM CASE FILES FOR AGENCY DISABILITY PROGRAM.	\$63,650.00	\$63,650.00	2016	5/31/2016	1	SS00164C022	0	SMALL BUSINESS
SKINNER CONSULTING SERVICES, INC.	VE EXPRESS REPORTING IGF::CT::IGF	\$63,618.90	\$63,618.90	2015	9/30/2015	2015	SS10541140433	0	SMALL BUSINESS

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CROSS III, GEORGE LEE MD	IGF::CL::IGF MEDICAL CONSULTANT SERVICES TO REVIEW	\$63,607.50	\$63,607.50	2017	11/23/2016		3 SS04164C039	0	SMALL BUSINESS
MAHLER, TIMOTHY E	VE EXPRESS REPORTING IGF::CT::IGF	\$63,606.60	\$63,606.60	2015	9/30/2015		2015 SS10381130077	0	SMALL BUSINESS
AUGINS, LINDA FERNANDEZ	VE EXPRESS REPORTING IGF::CT::IGF	\$63,606.00	\$63,606.00	2015	9/30/2015		2015 SS10381130147	0	SMALL BUSINESS
BARBARA HUBBARD, VOCATIONAL CONSULTANT	ME EXPRESS REPORTING - MENTAL HEALTH IGF::CT::IGF	\$63,556.94	\$63,556.94	2015	9/30/2015		2015 SS10781360009	0	SMALL BUSINESS
PATRICIA F HELDMAN MD	IGF::CL::IGF REGION 9 MEDICAL CONSULTANTS. REVIEWS BY MEDICAL CONSULTANT OF DISABILITY CLAIM CASE FILES FOR AGENCY DISABILITY PROGRAM. CALL ORDER TO AWARD PATRICIA HELDMAN 750 CASES AND 10 NON- CASE HOURS.	\$63,516.30	\$63,516.30	2016	2/24/2016		1 SS09164C021	0	SMALL BUSINESS
KRULL, KAREN	VE EXPRESS REPORTING IGF::CT::IGF	\$63,475.00	\$63,475.00	2015	9/30/2015		2015 SS10381130159	0	SMALL BUSINESS
NORTHERN REHABILITATION, INC.	VE EXPRESS REPORTING IGF::CT::IGF	\$63,462.00	\$63,462.00	2015	9/30/2015		2015 SS10251320037	0	SMALL BUSINESS
ELIAV, CHAIM B	ME EXPRESS REPORTING - MENTAL HEALTH IGF::CT::IGF	\$63,460.00	\$63,460.00	2015	9/30/2015		2015 SS10251120106	0	SMALL BUSINESS
THOMPSON, ROBERT C, MD	ME EXPRESS REPORTING - MENTAL HEALTH IGF::CT::IGF	\$63,430.00	\$63,430.00	2015	9/30/2015		2015 SS10781160154	0	SMALL BUSINESS
LARRY BENOVI TZ MD PA	ME EXPRESS REPORTING - MENTAL HEALTH IGF::CT::IGF	\$63,410.00	\$63,410.00	2015	9/30/2015		2015 SS10541140040	0	SMALL BUSINESS
PHOENIX REHABILITATION CORP	VE EXPRESS REPORTING IGF::CT::IGF	\$63,406.26	\$63,406.26	2015	9/30/2015		2015 SS10541140407	0	SMALL BUSINESS
PRATTON, VICKY MS LMHC	VE EXPRESS REPORTING IGF::CT::IGF	\$63,349.04	\$63,349.04	2015	9/30/2015		2015 SS10541140163	0	SMALL BUSINESS
FEDERAL PRISON INDUSTRIES INC	SXO MID BACK CHAIR, BLACK WEB SKU: SXO6100BLK0301 ERGONOMICALLY DESIGNED BACK FRAME WITH BUILT- IN LUMBAR SUPPORT. ENERGY ABSORBING SEAT. ADJUSTABLE ARMS. UPHOLSTERED, MESH BACK. COLOR: BLACK ALL PURPOSE BACK POCKET. CASTERS 250 LB. WEIGHT LIMIT	\$63,342.96	\$63,342.96	2016	9/12/2016	SS011650009		0	OTHER THAN SMALL BUSINESS
FUCHS,LOUIS A.	ME EXPRESS REPORTING - MENTAL HEALTH IGF::CT::IGF	\$63,250.00	\$63,250.00	2015	9/30/2015		2015 SS11501110016	0	SMALL BUSINESS
JANICE L BENDING, PHD INC	ME EXPRESS REPORTING - MENTAL HEALTH IGF::CT::IGF	\$63,241.49	\$63,241.49	2015	9/30/2015		2015 SS10631150403	0	SMALL BUSINESS
INDEPENDENT REHABILITATION COUNSELORS	VE EXPRESS REPORTING IGF::CT::IGF	\$63,218.00	\$63,218.00	2015	9/30/2015		2015 SS10381130117	0	SMALL BUSINESS
TABER, LINDA D	VE EXPRESS REPORTING IGF::CT::IGF	\$63,148.20	\$63,148.20	2015	9/30/2015		2015 SS10541140605	0	SMALL BUSINESS
TITANJI, RUDOLF	IGF::CL::IGF CREATE A NEW CALL ORDER FOR AWARD SS	\$63,100.00	\$63,100.00	2016	5/25/2016		1 SS00164C047	0	SMALL BUSINESS
JAMES A HARE	VE EXPRESS REPORTING IGF::CT::IGF	\$63,017.51	\$63,017.51	2015	9/30/2015		2015 SS10541140311	0	SMALL BUSINESS
DAUGHERTY, SUSAN E.	IGF::CL::IGF REGIONAL MEDICAL CONSULTANT SERVICES - REVIEWS BY MEDICAL CONSULTANT OF DISABILITY CLAIM CASE FILES FOR AGENCY DISABILITY PROGRAM.	\$63,000.00	\$63,000.00	2016	4/1/2016		2 SS06164C031	0	SMALL BUSINESS
MIRIAM GRENE	VE EXPRESS REPORTING IGF::CT::IGF	\$62,903.00	\$62,903.00	2015	9/30/2015		2015 SS10251120005	0	SMALL BUSINESS
NANCY SHAPERO	VE EXPRESS REPORTING IGF::CT::IGF	\$62,895.12	\$62,895.12	2015	9/30/2015		2015 SS10381130197	0	OTHER THAN SMALL BUSINESS
BEOUGHIER REHABILITATION	VE EXPRESS REPORTING IGF::CT::IGF	\$62,848.47	\$62,848.47	2015	9/30/2015		2015 SS10541140197	0	SMALL BUSINESS
VOCATIONAL MANAGEMENT RESOURCES	VE EXPRESS REPORTING IGF::CT::IGF	\$62,818.00	\$62,818.00	2015	9/30/2015		2015 SS11521100103	0	SMALL BUSINESS
ROWE REHABILITATION SERVICES	ME EXPRESS REPORTING - MENTAL HEALTH IGF::CT::IGF	\$62,700.55	\$62,700.55	2015	9/30/2015		2015 SS10631150179	0	SMALL BUSINESS
STEVENS MARY LOUISE PH D	ME EXPRESS REPORTING - MENTAL HEALTH IGF::CT::IGF	\$62,700.00	\$62,700.00	2015	9/30/2015		2015 SS10631150126	0	SMALL BUSINESS
MEADOWDALE MEDICAL CONSULTING, PLLC	MERRILL, MC, REGION 10 ADD FUNDING AND CASES IGF::CL::IGF CLOSELY ASSOCIATED	\$62,640.00	\$62,640.00	2016	2/8/2016		4 SS10154C000	0	SMALL BUSINESS
LAWRENCE SCHAFFZIN	PERIOD OF PERFORMANCE -04/01/2016 - 07/31/2016. THE CONTRACTOR SHALL COMPLETE INDEPENDENT CASE REVIEWS IN ACCORDANCE WITH THE TERMS AND CONDITIONS SET FORTH IN HIS RMC BPA. IGF::CL::IGF	\$62,640.00	\$62,640.00	2016	3/16/2016		3 SS03154C018	0	SMALL BUSINESS
VOCATIONAL REHABILITATION SPECIALISTS	VE EXPRESS REPORTING IGF::CT::IGF	\$62,579.00	\$62,579.00	2015	9/30/2015		2015 SS10691170045	0	SMALL BUSINESS

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Vendor Name	Description of Requirement	Action Obligation	Base and All Options Value	Fiscal Year	Date Signed	PO/Delivery Order/Task Order/Call#	Parent Contract	Mod #	Contracting Officers Business Size Selection
NATIONAL ASSOCIATION FOR PUBLIC HEALTH STATISTICS AND INFORM	IGF::OT::IGF TASK ORDER SS00-17-30016 IS BEING ISSUED FOR THE TESTING AND TECHNICAL ASSISTANCE FOR STATES IMPLEMENTING ELECTRONIC DEATH REGISTRATION SYSTEMS.	\$62,568.00	\$62,568.00	2017	10/24/2016	SS001730016	SS001660002	0	OTHER THAN SMALL BUSINESS
YOSHIOKA, JOY	ME EXPRESS REPORTING - MENTAL HEALTH IGF::CT::IGF	\$62,548.00	\$62,548.00	2015	9/30/2015	2015	SS10881190059	0	SMALL BUSINESS
GOODWILL INDUSTRIES OF THE CHESAPEAKE INCORPORATED	LOADING DOCK SERVICES - RMB BUILDING	\$62,512.06	\$62,512.06	2015	9/16/2015	SS000860004		30	OTHER THAN SMALL BUSINESS
HEALTH, PENNSYLVANIA DEPARTMENT OF	IGF::CL::IGF CLOSELY ASSOCIATED PA SS00-12-60040 ELECTRONIC DEATH REGISTRATION DELIVERY ORDER. 19,709 EDR RECORDS TOTAL DELIVERY ORDER \$62,480.00. PERIOD OF PERFORMANCE 1/01/2016 - 1/31/2016.	\$62,477.53	\$62,477.53	2016	12/28/2015	5	SS001260040	0	OTHER THAN SMALL BUSINESS
LYNN R HAYES	VE EXPRESS REPORTING IGF::CT::IGF	\$62,427.81	\$62,427.81	2015	9/30/2015	2015	SS10541140237	0	SMALL BUSINESS
VORHIES JR MD, JOHN R	IGF::CL::IGF VORHIES - CALL ORDER - CASES	\$62,411.25	\$62,411.25	2015	7/24/2015	12	SS061140026	2	SMALL BUSINESS
UNLIMITED POTENTIAL RESOURES INC	VE EXPRESS REPORTING IGF::CT::IGF	\$62,367.00	\$62,367.00	2015	9/30/2015	2015	SS10251120065	0	SMALL BUSINESS
PLURALSIGHT, LLC	IGF::OT::IGF PLURALSIGHT PLUS E-LEARNING SUBSCRIPTION	\$62,300.00	\$62,300.00	2016	7/28/2016	SS001650187		0	OTHER THAN SMALL BUSINESS
REHABILITATION SERVICES	VE EXPRESS REPORTING IGF::CT::IGF	\$62,234.70	\$62,234.70	2015	9/30/2015	2015	SS10541140589	0	SMALL BUSINESS
BOSCH STEVE QRC	ME EXPRESS REPORTING - MENTAL HEALTH IGF::CT::IGF	\$62,171.00	\$62,171.00	2015	9/30/2015	2015	SS10631150261	0	SMALL BUSINESS
INK VOCATIONAL REHABILITATION SERVICES, INC	VE EXPRESS REPORTING IGF::CT::IGF	\$62,134.00	\$62,134.00	2015	9/30/2015	2015	SS10881190259	0	SMALL BUSINESS
ENRIGHT, MICHAEL PHD	VE EXPRESS REPORTING IGF::CT::IGF	\$62,130.00	\$62,130.00	2015	9/30/2015	2015	SS11511180006	0	SMALL BUSINESS
DUCHON, RACHEL A	VE EXPRESS REPORTING IGF::CT::IGF	\$62,086.00	\$62,086.00	2015	9/30/2015	2015	SS10251320025	0	SMALL BUSINESS
SHEILA JUSTICE	VE EXPRESS REPORTING IGF::CT::IGF	\$61,987.76	\$61,987.76	2015	9/30/2015	2015	SS10541140495	0	SMALL BUSINESS
VOCATIONAL SOLUTIONS	VE EXPRESS REPORTING IGF::CT::IGF	\$61,932.00	\$61,932.00	2015	9/30/2015	2015	SS10781160237	0	SMALL BUSINESS
MALLON, CHERYL A.	VE EXPRESS REPORTING IGF::CT::IGF	\$61,758.00	\$61,758.00	2015	9/30/2015	2015	SS10781160187	0	SMALL BUSINESS
H RICHARD WARANCH	OMA MEDICAL CONSULTANTS. REVIEWS BY MEDICAL CONSULTANT OF DISABILITY CLAIM CASE FILES FOR AGENCY DISABILITY PROGRAM. ADDING NON-CASE SERVICES AND CASE REVIEWS AS APPLICABLE. IGF::CL::IGF	\$61,650.00	\$61,650.00	2016	9/2/2016	1	SS00164C051	1	SMALL BUSINESS
ROBERT BRESLIN	ME EXPRESS REPORTING - MENTAL HEALTH IGF::CT::IGF	\$61,543.58	\$61,543.58	2015	9/30/2015	2015	SS10631150063	0	SMALL BUSINESS
LINA B CALDWELL, MD	MEDICAL CONTRACTING SERVICES - PHYSICAL CASES CLOSELY ASSOCIATED TO INHERENTLY GOVERNMENTAL FUNCTION IGF::CL::IGF	\$61,507.50	\$61,507.50	2015	2/9/2015	18	SS041140039	0	SMALL BUSINESS
DISABILITY CONSULTANTS, LLC	MEDICAL CONTRACTOR SERVICES - MENTAL CASES CLOSELY ASSOCIATED TO INHERENTLY GOVERNMENTAL FUNCTION IGF::CL::IGF	\$61,507.50	\$61,507.50	2015	12/15/2014	34	SS041140025	0	SMALL BUSINESS
FRANCIS B BUDA MD	MEDICAL CONTRACTOR SERVICES - PHYSICAL CASES CLOSELY ASSOCIATED TO INHERENTLY GOVERNMENTAL FUNCTION IGF::CL::IGF	\$61,507.50	\$61,507.50	2015	3/4/2015	18	SS041140055	1	SMALL BUSINESS
L.M. KING SALES, INC.	VE EXPRESS REPORTING IGF::CT::IGF	\$61,472.00	\$61,472.00	2015	9/30/2015	2015	SS10781160147	0	SMALL BUSINESS
HERMAN LITT	VE EXPRESS REPORTING IGF::CT::IGF	\$61,402.00	\$61,402.00	2015	9/30/2015	2015	SS10781160045	0	SMALL BUSINESS
ORDMAN INTEGRATIVE HEALTH SERVICES, L.L.C.	IGF::CL::IGF NEW CASE REVIEWS FOR DR. ORDMAN	\$61,375.00	\$61,375.00	2016	5/26/2016	1	SS00164C036	0	SMALL BUSINESS
QUINLAN, JAMES A	OMA MEDICAL CONSULTANTS. REVIEWS BY MEDICAL CONSULTANT OF DISABILITY CLAIM CASE FILES FOR AGENCY DISABILITY PROGRAM. AWARDING DR. QUINLAN INDEPENDENT CASE REVIEWS AND NON-CASE SERVICES. IGF::CL::IGF	\$61,375.00	\$61,375.00	2016	5/31/2016	1	SS00164C068	0	SMALL BUSINESS
MARGARET R MOORE	VE EXPRESS REPORTING IGF::CT::IGF	\$61,360.00	\$61,360.00	2015	9/30/2015	2015	SS11511180008	0	SMALL BUSINESS
SINGH, KIRPAL MD	IGF::CL::IGF OMA MEDICAL CONSULTANTS. REVIEWS BY	\$61,350.00	\$61,350.00	2016	5/25/2016	1	SS00164C043	0	SMALL BUSINESS

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MEDINA MD, ANTONIO	OMA MEDICAL CONSULTANTS. REVIEWS BY MEDICAL CONSULTANT OF DISABILITY CLAIM CASE FILES FOR AGENCY DISABILITY PROGRAM. AWARDING DR. MEDINA INDEPENDENT CASE REVIEWS AND NON-CASE SERVICES. IGF::CL::IGF	\$61,350.00	\$61,350.00	2016	5/25/2016	1	SS00164C034	0	SMALL BUSINESS
KUSHNER, HERBERT	OMA MEDICAL CONSULTANTS. REVIEWS BY MEDICAL CONSULTANT OF DISABILITY CLAIM CASE FILES FOR AGENCY DISABILITY PROGRAM. IGF::CL::IGF	\$61,350.00	\$61,350.00	2016	5/23/2016	1	SS00164C071	0	SMALL BUSINESS
AMY MEACHAM, MHS, CVE, INC.	VE EXPRESS REPORTING IGF::CT::IGF	\$61,333.84	\$61,333.84	2015	9/30/2015	2015	SS10541240007	0	SMALL BUSINESS
WIESE, PAUL R PHD	VE EXPRESS REPORTING IGF::CT::IGF	\$61,320.00	\$61,320.00	2015	9/30/2015	2015	SS10541140096	0	SMALL BUSINESS
BENJAMIN CORTIJO JR MD	IGF::CL::IGF REGION 2 MEDICAL CONSULTANTS. REVIEWS BY MEDICAL CONSULTANT OF DISABILITY CLAIM CASE FILES FOR AGENCY DISABILITY PROGRAM. MODIFICATION TO INCREASE QUANTITY AND EXTEND PERFORMANCE.	\$61,215.00	\$61,215.00	2015	8/6/2015	15	SS021140074	1	SMALL BUSINESS
PARK, SEUNG J. MD	IGF::CL::IGF INDEPENDENT CASE REVIEWS	\$61,135.92	\$61,135.92	2016	2/1/2016	1	SS02164C016	0	SMALL BUSINESS
OLDS, COURTNEY S	VE EXPRESS REPORTING IGF::CT::IGF	\$61,128.60	\$61,128.60	2015	9/30/2015	2015	SS11501110017	0	SMALL BUSINESS
ANDERSON, MARY D	VE EXPRESS REPORTING IGF::CT::IGF	\$61,095.00	\$61,095.00	2015	9/30/2015	2015	SS10251320015	0	SMALL BUSINESS
BURNETT VOCATIONAL EXPERT SERVICES	ME EXPRESS REPORTING - MENTAL HEALTH IGF::CT::IGF	\$61,090.84	\$61,090.84	2015	9/30/2015	2015	SS11511180097	0	SMALL BUSINESS
HECKMAN ENTERPRISES, INC.	VE EXPRESS REPORTING IGF::CT::IGF	\$61,052.10	\$61,052.10	2015	9/30/2015	2015	SS10381130205	0	SMALL BUSINESS
DONOVAN, KEVIN PHD	IGF::CL::IGF CLOSELY ASSOCIATED - CALL ORDER FOR IT	\$61,050.00	\$61,050.00	2016	6/29/2016	2	SS07164C004	0	SMALL BUSINESS
SVEC, JULIE	VE EXPRESS REPORTING IGF::CT::IGF	\$61,021.00	\$61,021.00	2015	9/30/2015	2015	SS10691170005	0	SMALL BUSINESS
ALABAMA GOODWILL INDUSTRIES, INC.	IGF::CL::IGF WAREHOUSE SERVICES AT BSSC, FOLLOW-ON YEAR 1	\$225,878.88	\$60,978.48	2016	6/30/2016	SS041461003		2	OTHER THAN SMALL BUSINESS
BARRICKS, MICHAEL E.MD	IGF::CL::IGF REGION 9 MEDICAL CONSULTANTS. REVIEWS BY MEDICAL CONSULTANT OF DISABILITY CLAIM CASE FILES FOR AGENCY DISABILITY PROGRAM. CALL ORDER TO AWARD MICHAEL BARRICKS 650 CASES AND 70 NON-CASE HOURS.	\$60,974.10	\$60,974.10	2016	2/29/2016	1	SS09164C029	0	SMALL BUSINESS
BOTT, THOMAS E & ASSOCIATES INC	ME EXPRESS REPORTING - MENTAL HEALTH IGF::CT::IGF	\$60,805.02	\$60,805.02	2015	9/30/2015	2015	SS10781360013	0	SMALL BUSINESS
OLIVARES, RAFAEL J	IGF::CL::IGF CLOSELY ASSOCIATED - CALL ORDER FOR IT	\$60,800.00	\$60,800.00	2016	6/23/2016	3	SS08164C018	0	SMALL BUSINESS
BRILL, ROBERT M	IGF::CL::IGF CLOSELY ASSOCIATED - NEW CALL ORDER FOR	\$60,800.00	\$60,800.00	2016	6/16/2016	3	SS08164C004	0	SMALL BUSINESS
YAMAMOTO MD, FRANCIS K	IGF::CL::IGF CLOSELY ASSOCIATED - REGIONAL MEDICA	\$60,800.00	\$60,800.00	2016	5/18/2016	3	SS08164C026	0	SMALL BUSINESS
JULIAN KIVOWITZ MD	ME EXPRESS REPORTING - MENTAL HEALTH IGF::CT::IGF	\$60,770.00	\$60,770.00	2015	9/30/2015	2015	SS10881190062	0	SMALL BUSINESS
BENTHAM ENTERPRISES LLC	ME EXPRESS REPORTING - MENTAL HEALTH IGF::CT::IGF	\$60,721.60	\$60,721.60	2015	9/30/2015	2015	SS10781360002	0	SMALL BUSINESS
HEASTON, DAVID ED	VE EXPRESS REPORTING IGF::CT::IGF	\$60,675.00	\$60,675.00	2015	9/30/2015	2015	SS10541140505	0	SMALL BUSINESS
WILLIAM HOUSTON REED PHD, LTD	VE EXPRESS REPORTING IGF::CT::IGF	\$60,668.00	\$60,668.00	2015	9/30/2015	2015	SS10381130209	0	SMALL BUSINESS
ZINSMEISTER PAULA	VE EXPRESS REPORTING IGF::CT::IGF	\$60,641.00	\$60,641.00	2015	9/30/2015	2015	SS10631350033	0	SMALL BUSINESS
MAJORS, BEVERLY	VE EXPRESS REPORTING IGF::CT::IGF	\$60,625.90	\$60,625.90	2015	9/30/2015	2015	SS10781160039	0	SMALL BUSINESS
BRYARS, ASHLEY E	VE EXPRESS REPORTING IGF::CT::IGF	\$60,623.00	\$60,623.00	2015	9/30/2015	2015	SS11511180077	0	SMALL BUSINESS
BRENNER, ANNE MANON MD	IGF::CL::IGF CLOSELY ASSOCIATED - CALL ORDER FOR N	\$60,467.20	\$60,467.20	2016	7/21/2016	4	SS08164C002	0	SMALL BUSINESS
CARDINAL, STEVEN R	VE EXPRESS REPORTING IGF::CT::IGF	\$60,448.29	\$60,448.29	2015	9/30/2015	2015	SS11521100043	0	OTHER THAN SMALL BUSINESS
JOYCE FORREST	VE EXPRESS REPORTING IGF::CT::IGF	\$60,415.00	\$60,415.00	2015	9/30/2015	2015	SS10541140435	0	SMALL BUSINESS
VASS VOCATIONAL SERVICES INCORPORATED	VE EXPRESS REPORTING IGF::CT::IGF	\$60,375.00	\$60,375.00	2015	9/30/2015	2015	SS10381130111	0	SMALL BUSINESS
CAREERS UNDER CONSTRUCTION, INC.	VE EXPRESS REPORTING IGF::CT::IGF	\$60,371.56	\$60,371.56	2015	9/30/2015	2015	SS10631150097	0	SMALL BUSINESS
MAGINNIS, JENNIFER	VE EXPRESS REPORTING IGF::CT::IGF	\$60,332.00	\$60,332.00	2015	9/30/2015	2015	SS10781160169	0	SMALL BUSINESS
HUTCHINS VOCATIONAL	VE EXPRESS REPORTING IGF::CT::IGF	\$60,331.88	\$60,331.88	2015	9/30/2015	2015	SS10541140347	0	SMALL BUSINESS
VOCATIONAL SOLUTIONS HEALTH CARE	VE EXPRESS REPORTING IGF::CT::IGF	\$60,267.00	\$60,267.00	2015	9/30/2015	2015	SS10781160141	0	SMALL BUSINESS
SKLAR, LINDA	IGF::CL::IGF OMA MEDICAL CONSULTANTS. REVIEWS BY MEDICAL CONSULTANT OF DISABILITY CLAIM CASE FILES FOR AGENCY DISABILITY PROGRAM.	\$60,250.00	\$60,250.00	2016	5/26/2016	1	SS00164C044	0	SMALL BUSINESS



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CREMERIUS, MICHAEL PHD	IGF::CL::IGF REGION 5 MEDICAL CONSULTANTS. REVIEWS BY MEDICAL CONSULTANT OF DISABILITY CLAIM CASE FILES FOR AGENCY DISABILITY PROGRAM. CALL ORDER TO MICHAEL CREMERIUS.	\$60,218.40	\$60,218.40	2016	3/18/2016	1	SS05164C008	0	SMALL BUSINESS
ANNE DARNELL REHABILITATION SERVICES	VE EXPRESS REPORTING IGF::CT::IGF	\$60,162.48	\$60,162.48	2015	9/30/2015	2015	SS10541140259	0	SMALL BUSINESS
NANCY VIRGINIA GWON, MD	IGF::CL::IGF SS01-16-4C022 GWON, NANCY CALL ORDER FOR 750 CASES TO ESTABLISH A CALL ORDER FOR THE PERIOD 04/01/2016 - 03/31/2017. THE RATE OF PAY IS \$80.14 PER CASE FOR FUNDING TOTAL \$60,105.	\$60,105.00	\$60,105.00	2016	2/17/2016	1	SS01164C022	0	SMALL BUSINESS
SCUTT CONSULTING	VE EXPRESS REPORTING IGF::CT::IGF	\$60,102.00	\$60,102.00	2015	9/30/2015	2015	SS10381130095	0	SMALL BUSINESS
CARTWRIGHT, BRENDA Y	VE EXPRESS REPORTING IGF::CT::IGF	\$60,093.17	\$60,093.17	2015	9/30/2015	2015	SS10881190147	0	SMALL BUSINESS
JONAS, ALFRED G	ME EXPRESS REPORTING - MENTAL HEALTH IGF::CT::IGF	\$60,060.00	\$60,060.00	2015	9/30/2015	2015	SS10541140188	0	SMALL BUSINESS
SOUTHEASTERN REHABILITATION & TRAINING ASSOC.	VE EXPRESS REPORTING IGF::CT::IGF	\$60,026.50	\$60,026.50	2015	9/30/2015	2015	SS10541140489	0	SMALL BUSINESS
CRA INTERNATIONAL, INC.	IGF::OT::IGF MODIFICATION TO OBLIGATE ADDITIONAL F	\$59,955.00	\$59,955.00	2015	9/1/2015	SS001560036		1	OTHER THAN SMALL BUSINESS
KEYSTONE REHABILITATION INC	VE EXPRESS REPORTING IGF::CT::IGF	\$59,952.00	\$59,952.00	2015	9/30/2015	2015	SS10381130023	0	SMALL BUSINESS
FORD'S CONSULTING & CASE MANAGEMENT SERVICES, LLC	VE EXPRESS REPORTING IGF::CT::IGF	\$59,866.00	\$59,866.00	2015	9/30/2015	2015	SS10781160137	0	SMALL BUSINESS
RUTHERFORD, CAROLYN E	VE EXPRESS REPORTING IGF::CT::IGF	\$59,843.00	\$59,843.00	2015	9/30/2015	2015	SS10381130247	0	SMALL BUSINESS
UPCHURCH, JAMES C	IGF::CL::IGF MEDICAL CONTRACTOR SERVICES - PHYSICAL CASES CLOSELY ASSOCIATED TO INHERENTLY GOVERNMENTAL FUNCTION	\$59,703.00	\$59,703.00	2016	3/14/2016	2	SS04164C024	0	SMALL BUSINESS
MAR MEDICAL CONSULTANTS, P.A.	ME EXPRESS REPORTING - MENTAL HEALTH IGF::CT::IGF	\$59,610.00	\$59,610.00	2015	9/30/2015	2015	SS10381130068	0	SMALL BUSINESS
DAVID A FESTA	VE EXPRESS REPORTING IGF::CT::IGF	\$59,582.00	\$59,582.00	2015	9/30/2015	2015	SS10251120009	0	SMALL BUSINESS
GAETA, JOSEPH R MD	ME EXPRESS REPORTING - MENTAL HEALTH IGF::CT::IGF	\$59,570.00	\$59,570.00	2015	9/30/2015	2015	SS11501110076	0	SMALL BUSINESS
ENOVITY, INC.	IGF::CT::IGF	\$59,512.88	\$59,512.88	2016	8/26/2016	SS091651017		0	OTHER THAN SMALL BUSINESS
DATA PROCESSING TECHNIQUES INC	RENEW MAINTENANCE ON SS00-15-50122, DATA PROCE	\$59,486.00	\$59,486.00	2016	4/12/2016	SS001650101		0	SMALL BUSINESS
GLORIA LASOFF	VE EXPRESS REPORTING IGF::CT::IGF	\$59,482.00	\$59,482.00	2015	9/30/2015	2015	SS10881190241	0	SMALL BUSINESS
LOUIS GUY CHELTON III	IGF::CL::IGF MEDICAL CONSULTANT SERVICES TO REVIEW	\$59,367.00	\$59,367.00	2017	11/23/2016	3	SS04164C038	0	SMALL BUSINESS
ROMAN RVS INC.	VE EXPRESS REPORTING IGF::CT::IGF	\$59,300.00	\$59,300.00	2015	9/30/2015	2015	SS10881190289	0	SMALL BUSINESS
MURPHY, PATRICIA J	VE EXPRESS REPORTING IGF::CT::IGF	\$59,204.45	\$59,204.45	2015	9/30/2015	2015	SS10381130185	0	SMALL BUSINESS
WISCONSIN RETURN TO WORK CENTER	VE EXPRESS REPORTING IGF::CT::IGF	\$59,194.00	\$59,194.00	2015	9/30/2015	2015	SS10631150023	0	SMALL BUSINESS
PAIN AND REHABILITATION CENTER, INC	VE EXPRESS REPORTING IGF::CT::IGF	\$59,079.54	\$59,079.54	2015	9/30/2015	2015	SS10541140563	0	SMALL BUSINESS
MANI, DR LISA	MEDICAL CONTRACTOR SERVICES - PHYSICAL CASES CLOSELY ASSOCIATED TO INHERENTLY GOVERNMENTAL FUNCTION IGF::CL::IGF FOR CLOSELY ASSOCIATED	\$59,047.20	\$59,047.20	2015	12/15/2014	17	SS041140031	0	SMALL BUSINESS
VOCATIONAL DIRECTIONS, LLC	ME EXPRESS REPORTING - MENTAL HEALTH IGF::CT::IGF	\$58,962.00	\$58,962.00	2015	9/30/2015	2015	SS10631150091	0	SMALL BUSINESS
SACHS, STEVEN	VE EXPRESS REPORTING IGF::CT::IGF	\$58,886.40	\$58,886.40	2015	9/30/2015	2015	SS11501110057	0	SMALL BUSINESS
BOROSKIN, ALAN MA INC	VE EXPRESS REPORTING IGF::CT::IGF	\$58,877.00	\$58,877.00	2015	9/30/2015	2015	SS10881190237	0	SMALL BUSINESS
K & L DIVERSIFIED, LLC	VE EXPRESS REPORTING IGF::CT::IGF	\$58,811.80	\$58,811.80	2015	9/30/2015	2015	SS10541140621	0	SMALL BUSINESS
SCOTT DAVID T	IGF::CL::IGF SCOTT, MC, REGION 10 NEW CALL ORDER TO ADD INDEPENDENT CASE REVIEWS FOR THE PERIOD OF PERFORMANCE 03/01/2016 - 02/28/2017.	\$58,800.00	\$58,800.00	2016	2/2/2016	2	SS10154C009	0	SMALL BUSINESS



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Vendor Name	Description of Requirement	Action Obligation	Base and All Options Value	Fiscal Year	Date Signed	PO/Delivery Order/Task Order/Call#	Parent Contract	Mod #	Contracting Officers Business Size Selection
ZUKOWSKY, NORMAN	IGF::CL::IGF  REGION 9 MEDICAL CONSULTANTS. REVIEWS BY MEDICAL CONSULTANT OF DISABILITY CLAIM CASE FILES FOR AGENCY DISABILITY PROGRAM. CALL ORDER TO AWARD NORMAN ZURKOWSKY 700 CASES AND 4 NON-CASE HOURS.	\$58,766.52	\$58,766.52	2016	2/29/2016	1	SS09164C057	0	SMALL BUSINESS
PUBLIC HEALTH, IOWA DEPARTMENT OF CREIGHTON-CLAVEL, SUSAN	ELECTRONIC DEATH REGISTRATION IOWA THE PURPOSE OF MODIFICATION NUMBER 5 IS TO EXERCISE OPTION YEAR IV TO EXTEND THE TERM OF THE CONTRACT FROM JANUARY 1, 2016 THROUGH DECEMBER 31, 2016 FOR RECEIPT OF ELECTRONIC DEATH RECORDS. VE EXPRESS REPORTING IGF::CT::IGF	\$0.00 \$58,714.00	\$58,745.00 \$58,714.00	2016 2015	12/3/2015 9/30/2015	SS001260041 2015		5 0	OTHER THAN SMALL BUSINESS SMALL BUSINESS
GILMAN, MURRY J DR	MEDICAL CONSULTANT SERVICES - PHYSICAL CASES CLOSELY ASSOCIATED TO INHERENTLY GOVERNMENTAL FUNCTION IGF::CL::IGF	\$58,637.15	\$58,637.15	2015	6/22/2015	15	SS041140042	0	SMALL BUSINESS
DENNIS L. MOHN CONSULTING, INC.	VE EXPRESS REPORTING IGF::CT::IGF	\$58,615.00	\$58,615.00	2015	9/30/2015	2015	SS10381130101	0	SMALL BUSINESS
DARLENE MCQUARY	VE EXPRESS REPORTING IGF::CT::IGF	\$58,486.00	\$58,486.00	2015	9/30/2015	2015	SS10881190143	0	SMALL BUSINESS
SHARON L ROGERS PHD INC	VE EXPRESS REPORTING IGF::CT::IGF	\$58,441.63	\$58,441.63	2015	9/30/2015	2015	SS10781160034	0	SMALL BUSINESS
BRANSFORD, INC.	VE EXPRESS REPORTING IGF::CT::IGF	\$58,389.00	\$58,389.00	2015	9/30/2015	2015	SS10781160139	0	SMALL BUSINESS
WALKER, GEORGE	IGF::CL::IGF MEDICAL CONSULTANT SERVICES TO REVIEW	\$58,380.00	\$58,380.00	2016	8/31/2016	4	SS04164C025	0	SMALL BUSINESS
DANIEL J HENNESSY LLC	IGF::CL::IGF MEDICAL CONTRACTOR SERVICES - PHYSICAL	\$58,380.00	\$58,380.00	2016	3/23/2016	4	SS041440003	0	SMALL BUSINESS
LEONARD A SIMPSON DR	IGF::CL::IGF MODIFICATION TO ADD CASES AND EXTEND	\$58,380.00	\$58,380.00	2016	7/29/2016	1	SS09164C053	1	SMALL BUSINESS
PSYCHOLOGICAL INSTITUTE, P.C.	VE EXPRESS REPORTING IGF::CT::IGF	\$58,380.00	\$58,380.00	2015	9/30/2015	2015	SS11511180044	0	SMALL BUSINESS
MOWERY, AIMEE	ME EXPRESS REPORTING - MENTAL HEALTH IGF::CT::IGF	\$58,286.00	\$58,286.00	2015	9/30/2015	2015	SS10631150383	0	SMALL BUSINESS
RICHARD SMITH	VE EXPRESS REPORTING IGF::CT::IGF	\$58,181.00	\$58,181.00	2015	9/30/2015	2015	SS10541140239	0	SMALL BUSINESS
PAULINE, PAT W	VE EXPRESS REPORTING IGF::CT::IGF	\$58,107.00	\$58,107.00	2015	9/30/2015	2015	SS11511180059	0	SMALL BUSINESS
KIGER, WILLIAM J.	ME EXPRESS REPORTING - MENTAL HEALTH IGF::CT::IGF	\$58,047.00	\$58,047.00	2015	9/30/2015	2015	SS10631150147	0	SMALL BUSINESS
R & R REHABILITATION SERVICES LLC	VE EXPRESS REPORTING IGF::CT::IGF	\$57,925.53	\$57,925.53	2015	9/30/2015	2015	SS10781260008	0	SMALL BUSINESS
KELSAY, MARGARET INC	VE EXPRESS REPORTING IGF::CT::IGF	\$57,853.00	\$57,853.00	2015	9/30/2015	2015	SS10781160307	0	SMALL BUSINESS
EDWARD M SMITH	VE EXPRESS REPORTING IGF::CT::IGF	\$57,813.82	\$57,813.82	2015	9/30/2015	2015	SS10541140327	0	SMALL BUSINESS
EDNA CLARK	VE EXPRESS REPORTING IGF::CT::IGF	\$57,813.00	\$57,813.00	2015	9/30/2015	2015	SS10251120015	0	SMALL BUSINESS
FAST, RUTH	VE EXPRESS REPORTING IGF::CT::IGF	\$57,676.45	\$57,676.45	2015	9/30/2015	2015	SS10381130083	0	SMALL BUSINESS
LILLY, KRISTI	VE EXPRESS REPORTING IGF::CT::IGF	\$57,650.52	\$57,650.52	2015	9/30/2015	2015	SS10541340065	0	SMALL BUSINESS
REHABILITATION ASSOCIATES	VE EXPRESS REPORTING IGF::CT::IGF	\$57,604.00	\$57,604.00	2015	9/30/2015	2015	SS10541140177	0	SMALL BUSINESS
REYES, SILVIO S	VE EXPRESS REPORTING IGF::CT::IGF	\$57,588.20	\$57,588.20	2015	9/30/2015	2015	SS10541140078	0	SMALL BUSINESS
KELLEY, BETH	VE EXPRESS REPORTING IGF::CT::IGF	\$57,559.00	\$57,559.00	2015	9/30/2015	2015	SS10381130047	0	SMALL BUSINESS
CAROLE ROSANOVA MD	REGION V MEDICAL CONSULTANT SERVICES FOR THE SOCIAL SECURITY ADMINISTRATION. REVIEWS BY MEDICAL CONSULTANT OF DISABILITY CLAIM CASE FILES FOR AGENCY DISABILITY PROGRAM. AWARDING DR. CAROLE ROSANOVA INDEPENDENT CASE REVIEWS. IGF::CL::IGF	\$57,481.20	\$57,481.20	2016	6/28/2016	2	SS05164C035	0	SMALL BUSINESS
AROON SUANSILPPONGSE DR	DR. SUANSILPPONGSE MODIFICATION TO ADD CASES SS00-11-40032 IGF::CT::IGF	\$57,400.00	\$57,400.00	2015	1/13/2015	5	SS001140034	0	SMALL BUSINESS
DUONG, BICH THUY, MD	MEDICAL CONSULTANT CONTRACTORS BLANKET PURCHASE AGREEMENT IGF::CT::IGF	\$57,400.00	\$57,400.00	2015	1/22/2015	5	SS001140115	0	SMALL BUSINESS
GARY K STURGILL PHD	VE EXPRESS REPORTING IGF::CT::IGF	\$57,381.00	\$57,381.00	2015	9/30/2015	2015	SS10541140649	0	SMALL BUSINESS

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PUBLIC HEALTH, CALIFORNIA DEPARTMENT OF	IGF::CL::IGF CLOSELY ASSOCIATED CA-SS00-12-60007 ELECTRONIC DEATH REGISTRATION DELIVERY ORDER. EDR RECORDS 20,665. TOTAL COST \$57,347.35. PERIOD OF PERFORMANCE 1/01/2016 - 1/31/2016.	\$57,347.35	\$57,347.35	2016	12/30/2015	5	SS001260007	0	OTHER THAN SMALL BUSINESS
OCCUPATIONAL ANALYSTS INTERNATIONAL, INC	VE EXPRESS REPORTING IGF::CT::IGF	\$57,342.00	\$57,342.00	2015	9/30/2015	2015	SS11521100015	0	SMALL BUSINESS
HOWARD GOLDFARB	VE EXPRESS REPORTING IGF::CT::IGF	\$57,305.00	\$57,305.00	2015	9/30/2015	2015	SS10881190029	0	SMALL BUSINESS
IRON DATA SOLUTIONS, INC. (DE)	IGF::OT::IGF IDIQ CONTRACT SS00-11-60059(IRON DATA SOLUTIONS, INC.) TASK ORDER 0080: MICROSOFT OFFICE 2013 COMPATIBILITY TESTING FOR IMPLEMENTATION TO 47 SITES.	\$57,251.00	\$57,251.00	2016	11/12/2015	80	SS001160059	0	OTHER THAN SMALL BUSINESS
PUBLIC HEALTH, IOWA DEPARTMENT OF	NON-ELECTRONIC DEATH REGISTRATION - IOWA THE PURPOSE OF MODIFICATION NUMBER 4 IS TO EXERCISE OPTION YEAR THREE TO EXTEND THE TERM OF THE CONTRACT FROM JANUARY 1, 2015 THROUGH DECEMBER 31, 2015 FOR RECEIPT OF ELECTRONIC DEATH RECORDS.	\$0.00	\$57,195.00	2015	12/22/2014	SS001260041		4	OTHER THAN SMALL BUSINESS
ROBERT E PELC PHD ABP PROFESSIONAL CO	VE EXPRESS REPORTING IGF::CT::IGF	\$57,120.00	\$57,120.00	2015	9/30/2015	2015	SS11511180020	0	SMALL BUSINESS
LAWRENCE J. HAGERMAN M.D. LLC	ME EXPRESS REPORTING - MENTAL HEALTH IGF::CT::IGF	\$57,116.30	\$57,116.30	2015	9/30/2015	2015	SS10631150226	0	SMALL BUSINESS
TILTON, JOSHUA S	VE EXPRESS REPORTING IGF::CT::IGF	\$57,108.45	\$57,108.45	2015	9/30/2015	2015	SS10541140375	0	SMALL BUSINESS
WOLTERS KLUWER FINANCIAL SERVICES, INC.	RENEWAL OF MAINTENANCE ON 150 TEAMMATE AUDIT	\$57,105.00	\$57,105.00	2016	6/7/2016	SS001650021		0	OTHER THAN SMALL BUSINESS
JOSEPH L THOMPSON	ME EXPRESS REPORTING - MENTAL HEALTH IGF::CT::IGF	\$57,102.00	\$57,102.00	2015	9/30/2015	2015	SS10631150191	0	SMALL BUSINESS
VANECK, JIM	VE EXPRESS REPORTING IGF::CT::IGF	\$57,079.00	\$57,079.00	2015	9/30/2015	2015	SS10881190075	0	SMALL BUSINESS
O'CALLAGHAN, ERIN	ME EXPRESS REPORTING - MENTAL HEALTH IGF::CT::IGF	\$57,074.00	\$57,074.00	2015	9/30/2015	2015	SS10631150263	0	SMALL BUSINESS
BERKOWITZ, MARK PSY D	IGF::CL::IGF CLOSELY ASSOCIATED - REGIONAL MEDICAL	\$57,000.00	\$57,000.00	2016	2/11/2016	1	SS08164C001	1	SMALL BUSINESS
RUBINOWITZ, MARTIN DR PC	INDEPENDENT CASE REVIEWS (PC INTERNIST)REGION 8 IGF::CL::IGF	\$57,000.00	\$57,000.00	2016	2/12/2016	1	SS08164C020	1	SMALL BUSINESS
LEE, CHARLES K	IGF::CL::IGF CLOSELY ASSOCIATED REGIONAL MEDICAL	\$56,980.00	\$56,980.00	2016	2/29/2016	1	SS07164C012	0	SMALL BUSINESS
OCCUPTONAL RESOURCE SPECIALIST	VE EXPRESS REPORTING IGF::CT::IGF	\$56,958.00	\$56,958.00	2015	9/30/2015	2015	SS11521100005	0	SMALL BUSINESS
JONES, LYNN A	VE EXPRESS REPORTING IGF::CT::IGF	\$56,915.00	\$56,915.00	2015	9/30/2015	2015	SS11521100021	0	SMALL BUSINESS
ANDERSON, ERIC R	VE EXPRESS REPORTING IGF::CT::IGF	\$56,888.43	\$56,888.43	2015	9/30/2015	2015	SS10541140663	0	SMALL BUSINESS
DAVID W HEAD PHD	VE EXPRESS REPORTING IGF::CT::IGF	\$56,876.59	\$56,876.59	2015	9/30/2015	2015	SS10541140561	0	SMALL BUSINESS
AVANTI REHABILITATION	VE EXPRESS REPORTING IGF::CT::IGF	\$56,788.52	\$56,788.52	2015	9/30/2015	2015	SS11501210008	0	SMALL BUSINESS
STUART CLINIC & ASSOCIATES	ME EXPRESS REPORTING - MENTAL HEALTH IGF::CT::IGF	\$56,710.00	\$56,710.00	2015	9/30/2015	2015	SS10781160132	0	SMALL BUSINESS
VOCATIONAL SUPPORT SERVICES LLC	VE EXPRESS REPORTING IGF::CT::IGF	\$56,660.00	\$56,660.00	2015	9/30/2015	2015	SS10781160247	0	SMALL BUSINESS
ATKIN, THOMAS E	VE EXPRESS REPORTING IGF::CT::IGF	\$56,590.00	\$56,590.00	2015	9/30/2015	2015	SS11511180024	0	SMALL BUSINESS
SUE N BERTHAUME	VE EXPRESS REPORTING IGF::CT::IGF	\$56,491.71	\$56,491.71	2015	9/30/2015	2015	SS10541140395	0	SMALL BUSINESS
HERMAN MILLER, INC.	ST GEORGE, UT RA07 DESIGN, INSTALL, ESTIMATED PROJ	\$56,476.68	\$56,476.68	2015	7/28/2015	SS001530355		1	OTHER THAN SMALL BUSINESS
DUFFY, JENNIFER M	IGF::CL::IGF MODIFICATION TO ADD CASES AND EXTEND	\$56,461.80	\$56,461.80	2016	7/29/2016	1	SS09164C035	1	SMALL BUSINESS
ANDREW PRZYBYLA MD PC	IGF::CL::IGF REGIONAL MEDICAL CONSULTANT SERVICES FOR THE SOCIAL SECURITY ADMINISTRATION. REVIEWS BY MEDICAL CONSULTANT OF DISABILITY CLAIM CASE FILES FOR AGENCY DISABILITY PROGRAM.	\$56,248.36	\$56,248.36	2016	1/11/2016	1	SS02164C018	0	SMALL BUSINESS
LAYTON, KOURTNEY	VE EXPRESS REPORTING IGF::CT::IGF	\$56,246.00	\$56,246.00	2015	9/30/2015	2015	SS11511180025	0	SMALL BUSINESS
ALLEN, ELIZABETH A	VE EXPRESS REPORTING IGF::CT::IGF	\$56,236.90	\$56,236.90	2015	9/30/2015	2015	SS10541140155	0	SMALL BUSINESS
CORN & ASSOCIATES INC	ME EXPRESS REPORTING - MENTAL HEALTH IGF::CT::IGF	\$56,188.00	\$56,188.00	2015	9/30/2015	2015	SS10631150325	0	SMALL BUSINESS
LIGHTFOOT CONSULTANTS, LLC	VE EXPRESS REPORTING IGF::CT::IGF	\$56,185.80	\$56,185.80	2015	9/30/2015	2015	SS10781160345	0	SMALL BUSINESS
PUBLIC HEALTH, CALIFORNIA DEPARTMENT OF	IGF::OT::IGF OTHER FUNCTIONS CALIFORNIA ELECTRONIC DEATH RECORDS FOR OPTION YEAR 2015 PERIOD OF PERFORMANCE JANUARY 1, 2015 - JANUARY 31, 2015.	\$56,161.03	\$56,161.03	2015	12/29/2014	4	SS001260007	0	OTHER THAN SMALL BUSINESS
GONZALEZ, JOSE	IGF::CL::IGF MODIFICATION TO INCREASE QTY CASE REVIEWS AND EXTEND PERIOD OF PERFORMANCE.	\$56,160.00	\$56,160.00	2016	6/8/2016	5	SS021240008	1	SMALL BUSINESS
SPECTRUM SERVICES PC	VE EXPRESS REPORTING IGF::CT::IGF	\$56,050.00	\$56,050.00	2015	9/30/2015	2015	SS105411240015	0	SMALL BUSINESS

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Vendor Name	Description of Requirement	Action Obligation	Base and All Options Value	Fiscal Year	Date Signed	PO/Delivery Order/Task Order/Call#	Parent Contract	Mod #	Contracting Officers Business Size Selection
BROWN, SANNAGAI	IGF::CL::IGF MEDICAL CONSULTANT SERVICES TO REVIEW	\$55,974.60	\$55,974.60	2017	11/25/2016		4 SS04164C033	0	SMALL BUSINESS
SALKIN VOCATIONAL SERVICES INC	ME EXPRESS REPORTING - MENTAL HEALTH IGF::CT::IGF	\$55,941.00	\$55,941.00	2015	9/30/2015	2015	SS10631150181	0	SMALL BUSINESS
DENNIS W GUSTAFSON	ME EXPRESS REPORTING - MENTAL HEALTH IGF::CT::IGF	\$55,933.00	\$55,933.00	2015	9/30/2015	2015	SS10631150237	0	SMALL BUSINESS
WISEMAN, DANIEL MD	ME EXPRESS REPORTING - MENTAL HEALTH IGF::CT::IGF	\$55,920.00	\$55,920.00	2015	9/30/2015	2015	SS10881190088	0	SMALL BUSINESS
CECILIA THOMAS MS CRC	VE EXPRESS REPORTING IGF::CT::IGF	\$55,823.52	\$55,823.52	2015	9/30/2015	2015	SS10381130113	0	SMALL BUSINESS
FISHER, LEONARD MARION PH.D	ME EXPRESS REPORTING - MENTAL HEALTH IGF::CT::IGF	\$55,733.00	\$55,733.00	2015	9/30/2015	2015	SS10631150361	0	SMALL BUSINESS
MARY H KESSLER PHD	VE EXPRESS REPORTING IGF::CT::IGF	\$55,721.94	\$55,721.94	2015	9/30/2015	2015	SS10541140399	0	SMALL BUSINESS
GREGORY D MCCORMACK MD	OMA MEDICAL CONSULTANTS. REVIEWS BY MEDICAL CONSULTANT OF DISABILITY CLAIM CASE FILES FOR AGENCY DISABILITY PROGRAM. ADDING NON-CASE SERVICES (AND/OR CASE REVIEWS AS APPLICABLE). IGF::CL::IGF	\$55,650.00	\$55,650.00	2016	9/6/2016	1	SS00164C031	1	SMALL BUSINESS
DANIEL R MALONE	IGF::CL::IGF OMA MEDICAL CONSULTANTS. REVIEWS BY MEDICAL CONSULTANT OF DISABILITY CLAIM CASE FILES FOR AGENCY DISABILITY PROGRAM.	\$55,625.00	\$55,625.00	2016	5/25/2016	1	SS00164C065	0	SMALL BUSINESS
NORMAN C HOOGE	VE EXPRESS REPORTING IGF::CT::IGF	\$55,608.65	\$55,608.65	2015	9/30/2015	2015	SS10781160013	0	SMALL BUSINESS
JOHN N STOKES	ME EXPRESS REPORTING - MENTAL HEALTH IGF::CT::IGF	\$55,543.00	\$55,543.00	2015	9/30/2015	2015	SS10631150279	0	SMALL BUSINESS
SCHULZ, CARL	VE EXPRESS REPORTING IGF::CT::IGF	\$55,532.00	\$55,532.00	2015	9/30/2015	2015	SS10541140499	0	SMALL BUSINESS
HEALTH AND HUMAN SERVICES, NEVADA DEPARTMENT OF	IGF::CL::IGF CLOSELY ASSOCIATED REQUEST EDR FUNDING FOR 2016 CONTRACT YEAR FOR NEVADA.	\$55,500.00	\$55,500.00	2016	12/22/2015	5	SS001260029	0	OTHER THAN SMALL BUSINESS
DEPARTMENT OF HEALTH UTAH	IGF::CL::IGF CLOSELY ASSOCIATED UT SS00-12-60057 ELECTRONIC DEATH REGISTRATION DELIVERY ORDER. 20.000 EDR RECORDS TOTAL DELIVERY ORDER \$55,500.00. PERIOD OF PERFORMANCE 1/01/2016 - 12/31/2016.	\$55,500.00	\$55,500.00	2016	12/22/2015	5	SS001260057	0	OTHER THAN SMALL BUSINESS
BRUCE B MARTIN	VE EXPRESS REPORTING IGF::CT::IGF	\$55,482.00	\$55,482.00	2015	9/30/2015	2015	SS10381130251	0	SMALL BUSINESS
JACQUELINE FARWELL	MEDICAL CONSULTANT REG 10 FARWELL IGF::CL::IGF CLOSELY ASSOCIATED	\$55,374.00	\$55,374.00	2016	7/12/2016	3	SS10154C006	0	SMALL BUSINESS
BROWN, SANNAGAI	MEDICAL CONSULTANT SERVICES - PHYSICAL CASES CLOSELY ASSOCIATED TO INHERENTLY GOVERNMENTAL FUNCTION IGF::CL::IGF	\$55,356.75	\$55,356.75	2015	3/16/2015	12	SS041140041	1	SMALL BUSINESS
LINDA M FERRA	VE EXPRESS REPORTING IGF::CT::IGF	\$55,228.00	\$55,228.00	2015	9/30/2015	2015	SS10881190041	0	SMALL BUSINESS
MAMARIL, AMSELMO JR	OMA MEDICAL CONSULTANTS. REVIEWS BY MEDICAL CONSULTANT OF DISABILITY CLAIM CASE FILES FOR AGENCY DISABILITY PROGRAM. AWARDING DR. MAMARIL INDEPENDENT CASE REVIEWS AND NON-CASE SERVICES. IGF::CL::IGF	\$55,050.00	\$55,050.00	2016	5/25/2016	1	SS00164C030	0	SMALL BUSINESS
TERRY, FRANCES	VE EXPRESS REPORTING IGF::CT::IGF	\$55,029.00	\$55,029.00	2015	9/30/2015	2015	SS10381130027	0	SMALL BUSINESS
JUS-MAR LIMITED	VE EXPRESS REPORTING IGF::CT::IGF	\$55,006.15	\$55,006.15	2015	9/30/2015	2015	SS10781160333	0	OTHER THAN SMALL BUSINESS
AMERICAN PSYCHIATRIC ASSOCIATION	PSYCHIATRY ONLINE DSM-5 RENEWAL	\$54,918.00	\$54,918.00	2016	12/29/2015	SS001650029		0	OTHER THAN SMALL BUSINESS
NADINE HENZES	VE EXPRESS REPORTING IGF::CT::IGF	\$54,868.00	\$54,868.00	2015	9/30/2015	2015	SS10381130041	0	SMALL BUSINESS
VOCATIONAL CONSULTANTS	VE EXPRESS REPORTING IGF::CT::IGF	\$54,854.00	\$54,854.00	2015	9/30/2015	2015	SS10381130191	0	SMALL BUSINESS
GERALD KEATING	VE EXPRESS REPORTING IGF::CT::IGF	\$54,827.00	\$54,827.00	2015	9/30/2015	2015	SS10381130173	0	SMALL BUSINESS
STEVENS BERNARD	IGF::CL::IGF MEDICAL CONSULTANT SERVICES- REGION 5 AWARDING DR. BERNARD STEVENS INDEPENDENT CASE REVIEWS AGAINST SS05-16-4C025, CALL ORDER 1.	\$54,744.00	\$54,744.00	2016	3/24/2016	1	SS05164C025	0	SMALL BUSINESS
MILA C. R. BACALLA MD	MEDICAL CONSULTANT SERVICES DR. MILA BACALLA IGF::CL::IGF	\$54,744.00	\$54,744.00	2016	3/15/2016	1	SS05164C001	0	SMALL BUSINESS

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Vendor Name	Description of Requirement	Action Obligation	Base and All Options Value	Fiscal Year	Date Signed	PO/Delivery Order/Task Order/Call#	Parent Contract	Mod #	Contracting Officers Business Size Selection
MARY JONES	MEDICAL CONSULTANT SERVICES MARY JONES IGF::CL::IGF	\$54,744.00	\$54,744.00	2016	5/4/2016	1	SS05164C033	1	SMALL BUSINESS
ORFEI, CRISTINA	REGION V MEDICAL CONSULTANT SERVICES FOR THE SOCIAL SECURITY ADMINISTRATION. REVIEWS BY MEDICAL CONSULTANT OF DISABILITY CLAIM CASE FILES FOR AGENCY DISABILITY PROGRAM. AWARDING DR. CRISTINA ORFEI INDEPENDENT CASE REVIEWS. IGF::CL::IGF	\$54,744.00	\$54,744.00	2016	6/30/2016	2	SS05164C034	0	SMALL BUSINESS
VOCATIONAL ASSESSMENT, INC.	VE EXPRESS REPORTING IGF::CT::IGF	\$54,673.00	\$54,673.00	2015	9/30/2015	2015	SS10541140633	0	SMALL BUSINESS
LINVILL ASSOCIATES	VE EXPRESS REPORTING IGF::CT::IGF	\$54,558.00	\$54,558.00	2015	9/30/2015	2015	SS10881190199	0	SMALL BUSINESS
BOAZ, KENNY	VE EXPRESS REPORTING IGF::CT::IGF	\$54,543.13	\$54,543.13	2015	9/30/2015	2015	SS10541140655	0	SMALL BUSINESS
DOHERTY, JOSEPHINE A	VE EXPRESS REPORTING IGF::CT::IGF	\$54,501.00	\$54,501.00	2015	9/30/2015	2015	SS10381130015	0	SMALL BUSINESS
SERVICES 2000	VE EXPRESS REPORTING IGF::CT::IGF	\$54,455.00	\$54,455.00	2015	9/30/2015	2015	SS10781160233	0	SMALL BUSINESS
SANDY RICHTER AND ASSOCIATES INC	VE EXPRESS REPORTING IGF::CT::IGF	\$54,448.00	\$54,448.00	2015	9/30/2015	2015	SS10881190165	0	SMALL BUSINESS
STANLEY CONVERGENT SECURITY SOLUTIONS, INC.	IDS MAINTENANCEFOR 6 MONTHS FOR SSA OFFICES IN R	\$54,426.00	\$54,426.00	2016	2/18/2016	SS021650003		0	OTHER THAN SMALL BUSINESS
WOLTERS KLUWER FINANCIAL SERVICES, INC.	RENEWAL OF MAINTENANCE ON 150 TEAMMATE AUDIT	\$54,390.00	\$54,390.00	2015	6/9/2015	SS001550162		0	OTHER THAN SMALL BUSINESS
MARTIN, MARIAN F PH.D	VE EXPRESS REPORTING IGF::CT::IGF	\$54,200.00	\$54,200.00	2015	9/30/2015	2015	SS11511180014	0	SMALL BUSINESS
BROWN, SANNAGAI	MEDICAL CONSULTANT SERVICES - PHYSICAL CASES CLOSELY ASSOCIATED TO INHERENTLY GOVERNMENTAL FUNCTION IGF::CL::IGF	\$54,126.60	\$54,126.60	2015	12/11/2014	12	SS041140041	0	SMALL BUSINESS
HEALTH AND HUMAN SERVICES, NEVADA DEPARTMENT OF	IGF::OT::IGF OTHER FUNCTIONS NV RECEIPT OF ELECTRONIC DEATH RECORDS FOR OPTION YEAR III PERIOD OF PERFORMANCE JANUARY 1, 2015 - DECEMBER 31, 2015.	\$54,100.00	\$54,100.00	2015	12/22/2014	4	SS001260029	0	OTHER THAN SMALL BUSINESS
DEPARTMENT OF HEALTH UTAH	IGF::OT::IGF OTHER FUNCTIONS UT RECEIPT OF ELECTRONIC DEATH RECORDS FOR OPTION YEAR III PERIOD OF PERFORMANCE JANUARY 1, 2015 - DECEMBER 31, 2015.	\$54,100.00	\$54,100.00	2015	12/22/2014	4	SS001260057	0	OTHER THAN SMALL BUSINESS
SOUTH DAKOTA DEPARTMENT OF HEALTH	IGF::CL::IGF REQUESTING MISSING OR UNREPORTED DE	\$54,000.00	\$54,000.00	2016	7/11/2016	SS001660024		0	OTHER THAN SMALL BUSINESS
BENNETT, MS CRC, KENNETH L	VE EXPRESS REPORTING IGF::CT::IGF	\$53,875.56	\$53,875.56	2015	9/30/2015	2015	SS10541140265	0	SMALL BUSINESS
CORTES, JENNIFER A	IGF::CL::IGF REGION 2 MEDICAL CONSULTANTS. REVIEWS BY MEDICAL CONSULTANT OF DISABILITY CLAIM CASE FILES FOR AGENCY DISABILITY PROGRAM.	\$53,846.00	\$53,846.00	2016	3/3/2016	1	SS02164C007	0	SMALL BUSINESS
MARK A MCGOWAN MS CRC	VE EXPRESS REPORTING IGF::CT::IGF	\$53,743.35	\$53,743.35	2015	9/30/2015	2015	SS11521100033	0	SMALL BUSINESS
RTW COMPANY, THE	VE EXPRESS REPORTING IGF::CT::IGF	\$53,720.57	\$53,720.57	2015	9/30/2015	2015	SS10781160133	0	SMALL BUSINESS
DURR, DIANE	VE EXPRESS REPORTING IGF::CT::IGF	\$53,719.00	\$53,719.00	2015	9/30/2015	2015	SS11501210010	0	SMALL BUSINESS
MENTAL HEALTH SOLUTIONS INC	VE EXPRESS REPORTING IGF::CT::IGF	\$53,653.00	\$53,653.00	2015	9/30/2015	2015	SS10631450013	0	SMALL BUSINESS
DORVAL, MICHAEL	VE EXPRESS REPORTING IGF::CT::IGF	\$53,461.00	\$53,461.00	2015	9/30/2015	2015	SS11501510001	0	SMALL BUSINESS
ESTELLE L. DAVIS, INC	VE EXPRESS REPORTING IGF::CT::IGF	\$53,389.48	\$53,389.48	2015	9/30/2015	2015	SS10381130195	0	SMALL BUSINESS
LONG JR, JOHN M	VE EXPRESS REPORTING IGF::CT::IGF	\$53,384.75	\$53,384.75	2015	9/30/2015	2015	SS10541140383	0	SMALL BUSINESS
CARL G. LEIGH, M.D. S.C.	REGION 5 MEDICAL CONSULTANTS IGF::CL::IGF	\$53,375.40	\$53,375.40	2016	6/27/2016	2	SS05164C017	0	SMALL BUSINESS
HEMANTHA SURATH MD	REGION V MEDICAL CONSULTANT SERVICES FOR THE SOCIAL SECURITY ADMINISTRATION. REVIEWS BY MEDICAL CONSULTANT OF DISABILITY CLAIM CASE FILES FOR AGENCY DISABILITY PROGRAM. IGF::CL::IGF	\$53,375.40	\$53,375.40	2016	6/30/2016	2	SS05164C026	0	SMALL BUSINESS
CHARLES D TURNER	VE EXPRESS REPORTING IGF::CT::IGF	\$53,304.00	\$53,304.00	2015	9/30/2015	2015	SS10781160311	0	SMALL BUSINESS
CREATIVE REHABILITATION MANAGEMENT INC	VE EXPRESS REPORTING IGF::CT::IGF	\$53,290.00	\$53,290.00	2015	9/30/2015	2015	SS10631150331	0	SMALL BUSINESS
LEARNING FROM THE JOURNEY INC	IGF::CL::IGF CLOSELY ASSOCIATED - INDEPENDENT CAS	\$53,200.00	\$53,200.00	2016	2/19/2016	1	SS08164C013	1	SMALL BUSINESS
HARTUNG & ASSOCIATES INC	ME EXPRESS REPORTING - MENTAL HEALTH IGF::CT::IGF	\$53,123.00	\$53,123.00	2015	9/30/2015	2015	SS10631150283	0	SMALL BUSINESS
HOLDEREAD, BRUCE V	ME EXPRESS REPORTING - MENTAL HEALTH IGF::CT::IGF	\$53,088.00	\$53,088.00	2015	9/30/2015	2015	SS10631150143	0	SMALL BUSINESS

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Vendor Name	Description of Requirement	Action Obligation	Base and All Options Value	Fiscal Year	Date Signed	PO/Delivery Order/Task Order/Call#	Parent Contract	Mod #	Contracting Officers Business Size Selection
CHAHAL, RAMAN GILL MD	IGF::CL::IGF OMA MEDICAL CONSULTANTS. REVIEWS BY MEDICAL CONSULTANT OF DISABILITY CLAIM CASE FILES FOR AGENCY DISABILITY PROGRAM. ADDING NON-CASE SERVICES AND CASE REVIEWS.	\$53,050.00	\$53,050.00	2016	9/7/2016	1	SS00164C007	1	SMALL BUSINESS
CHARLES E LAWRENCE PHD PC	OMA MEDICAL CONSULTANTS. REVIEWS BY MEDICAL CONSULTANT OF DISABILITY CLAIM CASE FILES FOR AGENCY DISABILITY PROGRAM. ADDING NON-CASE SERVICES (AND/OR CASE REVIEWS AS APPLICABLE). IGF::CL::IGF	\$53,050.00	\$53,050.00	2016	9/6/2016	1	SS00164C029	1	SMALL BUSINESS
INSURANCE MEDICAL CAREERS INC	VE EXPRESS REPORTING IGF::CT::IGF	\$53,008.00	\$53,008.00	2015	9/30/2015	2015	SS10381130199	0	SMALL BUSINESS
DATA PROCESSING TECHNIQUES INC	RENEW MAINTENANCE ON SS00-13-50095 PDS MONITO	\$53,000.00	\$53,000.00	2015	4/21/2015	SS001550122		0	SMALL BUSINESS
MARTIN, JUDY	IGF::CL::IGF CLOSELY ASSOCIATED - CALL ORDER FOR II	\$52,910.00	\$52,910.00	2016	7/18/2016	2	SS07164C015	0	SMALL BUSINESS
ERIC C. PUESTOW, M.D., P.A.	ME EXPRESS REPORTING - MENTAL HEALTH IGF::CT::IGF	\$52,900.00	\$52,900.00	2015	9/30/2015	2015	SS10541140036	0	SMALL BUSINESS
SCHOSHEIM, JOHN	ME EXPRESS REPORTING - MENTAL HEALTH IGF::CT::IGF	\$52,850.00	\$52,850.00	2015	9/30/2015	2015	SS10541140062	0	SMALL BUSINESS
LUIS SERRANO	VE EXPRESS REPORTING IGF::CT::IGF	\$52,850.00	\$52,850.00	2015	9/30/2015	2015	SS10251120063	0	OTHER THAN SMALL BUSINESS
CHICAGO SOFT, LTD.	RENEWAL OF SS00-14-51117 CHICAGO SOFT LTD. MVS/C	\$52,822.00	\$52,822.00	2015	4/28/2015	SS001550129		0	SMALL BUSINESS
AMERICAN PSYCHIATRIC ASSOCIATION	PSYCHIATRY ONLINE PREMIUM SUBSCRIPTION RENEWAL	\$52,806.00	\$52,806.00	2015	12/18/2014	SS001550044		0	OTHER THAN SMALL BUSINESS
CHAHAL, RAMAN GILL MD	IGF::CL::IGF OMA MEDICAL CONSULTANTS. REVIEWS BY MEDICAL CONSULTANT OF DISABILITY CLAIM CASE FILES FOR AGENCY DISABILITY PROGRAM.	\$52,750.00	\$52,750.00	2016	5/23/2016	1	SS00164C007	0	SMALL BUSINESS
RAMSEY, HAROLD E MD	IGF::CL::IGF OMA MEDICAL CONSULTANTS. REVIEWS BY MEDICAL CONSULTANT OF DISABILITY CLAIM CASE FILES FOR AGENCY DISABILITY PROGRAM.	\$52,750.00	\$52,750.00	2016	5/25/2016	1	SS00164C069	0	SMALL BUSINESS
UNGER MD, H THOMAS	IGF::CL::IGF OMA MEDICAL CONSULTANTS. REVIEWS BY MEDICAL CONSULTANT OF DISABILITY CLAIM CASE FILES FOR AGENCY DISABILITY PROGRAM.	\$52,750.00	\$52,750.00	2016	5/31/2016	1	SS00164C028	0	SMALL BUSINESS
KELMAN REHABILITATION CONSULTANTS	VE EXPRESS REPORTING IGF::CT::IGF	\$52,717.00	\$52,717.00	2015	9/30/2015	2015	SS10881190115	0	SMALL BUSINESS
CUTLER COUNSELING LLC	VE EXPRESS REPORTING IGF::CT::IGF	\$52,477.02	\$52,477.02	2015	9/30/2015	2015	SS11521100009	0	SMALL BUSINESS
FRED A MONACO PHD	VE EXPRESS REPORTING IGF::CT::IGF	\$52,461.00	\$52,461.00	2015	9/30/2015	2015	SS10381130165	0	SMALL BUSINESS
PUBLIC HEALTH, MASSACHUSETTS DEPT OF	IGF::OT::IGF OTHER FUNCTIONS MA RECEIPT OF NON-ELECTRONIC DEATH RECORDS FOR OPTION YEAR III PERIOD OF PERFORMANCE JANUARY 1, 2015 - DECEMBER 31, 2015.	\$52,460.00	\$52,460.00	2015	12/22/2014	4	SS001260053	0	OTHER THAN SMALL BUSINESS
BREWER, EARNEST W	VE EXPRESS REPORTING IGF::CT::IGF	\$52,419.00	\$52,419.00	2015	9/30/2015	2015	SS10541140437	0	SMALL BUSINESS
BENNETT, KIM EDWARDS	VE EXPRESS REPORTING IGF::CT::IGF	\$52,415.06	\$52,415.06	2015	9/30/2015	2015	SS10541140263	0	SMALL BUSINESS
RASCHKE, ROBERT A	VE EXPRESS REPORTING IGF::CT::IGF	\$52,358.00	\$52,358.00	2015	9/30/2015	2015	SS10881190265	0	SMALL BUSINESS
KIEFFER, MARIE	VE EXPRESS REPORTING IGF::CT::IGF	\$52,341.00	\$52,341.00	2015	9/30/2015	2015	SS10631150447	0	SMALL BUSINESS
BOATNER REHABILITATION & COUNSELING	VE EXPRESS REPORTING IGF::CT::IGF	\$52,329.00	\$52,329.00	2015	9/30/2015	2015	SS10541140203	0	SMALL BUSINESS
GOSS REHABILITATION	VE EXPRESS REPORTING IGF::CT::IGF	\$52,179.00	\$52,179.00	2015	9/30/2015	2015	SS10541140553	0	SMALL BUSINESS
PROFESSIONAL REHAB & OCC SRVS	VE EXPRESS REPORTING IGF::CT::IGF	\$52,167.00	\$52,167.00	2015	9/30/2015	2015	SS10781160283	0	SMALL BUSINESS
MELOY ENTERPRISES, INC.	VE EXPRESS REPORTING IGF::CT::IGF	\$52,122.00	\$52,122.00	2015	9/30/2015	2015	SS10781160303	0	SMALL BUSINESS
FIERMAN MD, EUGENE J	IGF::CL::IGF - SS01-16-4C006 - FIERMAN, EUGENE - CALL	\$52,091.00	\$52,091.00	2016	2/13/2016	1	SS01164C006	0	SMALL BUSINESS
SUSMAN, MORRIS H	IGF::CL::IGF CLOSELY ASSOCIATED - CALL ORDER FOR II	\$52,060.00	\$52,060.00	2016	7/28/2016	2	SS08164C022	0	SMALL BUSINESS
BLITZ, JENNIFER	ME EXPRESS REPORTING - MENTAL HEALTH IGF::CT::IGF	\$52,060.00	\$52,060.00	2015	9/30/2015	2015	SS10251120096	0	SMALL BUSINESS
DISABILITY RESOURCE CONSULTING SERVICES	VE EXPRESS REPORTING IGF::CT::IGF	\$51,986.00	\$51,986.00	2015	9/30/2015	2015	SS10691170065	0	SMALL BUSINESS
JAMES M HAYNES M D	ME EXPRESS REPORTING - MENTAL HEALTH IGF::CT::IGF	\$51,940.00	\$51,940.00	2015	9/30/2015	2015	SS11521100038	0	SMALL BUSINESS
OCCUPATIONAL PLANNING & PLACEMENT INC	ME EXPRESS REPORTING - MENTAL HEALTH IGF::CT::IGF	\$51,867.80	\$51,867.80	2015	9/30/2015	2015	SS10631150289	0	SMALL BUSINESS
GAFFNEY COUNSELING AND CONSULTING	VE EXPRESS REPORTING IGF::CT::IGF	\$51,861.00	\$51,861.00	2015	9/30/2015	2015	SS11521100075	0	SMALL BUSINESS
WOLTERS KLUWER FINANCIAL SERVICES, INC.	THIS REQUISITION WILL PROVIDE THE OFFICE OF AUDIT V	\$51,818.00	\$51,818.00	2015	3/17/2015	SS001550090		0	OTHER THAN SMALL BUSINESS
WILLIAMSON, MELISSA	VE EXPRESS REPORTING IGF::CT::IGF	\$51,746.00	\$51,746.00	2015	9/30/2015	2015	SS10541440005	0	SMALL BUSINESS
POLIN, RICHARD S	ME EXPRESS REPORTING - MENTAL HEALTH IGF::CT::IGF	\$51,730.00	\$51,730.00	2015	9/30/2015	2015	SS10111100047	0	SMALL BUSINESS
L N VAUSE REHABILITATION PROFESSIONALS	VE EXPRESS REPORTING IGF::CT::IGF	\$51,729.00	\$51,729.00	2015	9/30/2015	2015	SS10251120073	0	SMALL BUSINESS

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Vendor Name	Description of Requirement	Action Obligation	Base and All Options Value	Fiscal Year	Date Signed	PO/Delivery Order/Task Order/Call#	Parent Contract	Mod #	Contracting Officers Business Size Selection
HPI/GSA - 2B, L.P.	IGF::OT::IGF DAYTIME CLEANING SERVICES FOR THE DALLAS REGIONAL OFFICE IN DALLAS, TEXAS	\$51,682.20	\$51,682.20	2016	2/25/2016	SS061650001			0 OTHER THAN SMALL BUSINESS
FRANCES N KINLEY	VE EXPRESS REPORTING IGF::CT::IGF	\$51,662.00	\$51,662.00	2015	9/30/2015	2015	SS10381130039		0 SMALL BUSINESS
RAMSEY, HAROLD E MD	IGF::CL::IGF OMA MEDICAL CONSULTANTS. REVIEWS BY MEDICAL CONSULTANT OF DISABILITY CLAIM CASE FILES FOR AGENCY DISABILITY PROGRAM. ADDING INDEPENDENT CASE REVIEWS	\$51,600.00	\$51,600.00	2016	9/14/2016	1	SS00164C069	1	SMALL BUSINESS
DUONG, BICH THUY, MD	OMA MEDICAL CONSULTANTS. REVIEWS BY MEDICAL CONSULTANT OF DISABILITY CLAIM CASE FILES FOR AGENCY DISABILITY PROGRAM. ADDING NON-CASE SERVICES (AND/OR CASE REVIEWS AS APPLICABLE). IGF::CL::IGF	\$51,600.00	\$51,600.00	2016	9/6/2016	1	SS00164C012	1	SMALL BUSINESS
MALCOLM DRUSKIN MD	OMA MEDICAL CONSULTANTS. REVIEWS BY MEDICAL CONSULTANT OF DISABILITY CLAIM CASE FILES FOR AGENCY DISABILITY PROGRAM. ADDING NON-CASE SERVICES (AND/OR CASE REVIEWS AS APPLICABLE). IGF::CL::IGF	\$51,600.00	\$51,600.00	2016	8/29/2016	1	SS00164C011	1	SMALL BUSINESS
RUGGIANO, JOHN	VE EXPRESS REPORTING IGF::CT::IGF	\$51,580.00	\$51,580.00	2015	9/30/2015	2015	SS11501110060		0 SMALL BUSINESS
CAROL G MCMANUS CONSULTING LLC	VE EXPRESS REPORTING IGF::CT::IGF	\$51,575.00	\$51,575.00	2015	9/30/2015	2015	SS10251320043		0 SMALL BUSINESS
HANKINS VOCATIONAL CONSULTING	VE EXPRESS REPORTING IGF::CT::IGF	\$51,574.94	\$51,574.94	2015	9/30/2015	2015	SS10541140545		0 SMALL BUSINESS
KILCHER REHABILITATION ASSOC INC	VE EXPRESS REPORTING IGF::CT::IGF	\$51,532.00	\$51,532.00	2015	9/30/2015	2015	SS10881190015		0 SMALL BUSINESS
PATRICIA F HELDMAN MD	IGF::CL::IGF MODIFICATION TO ADD CASES, ADD NON-CA	\$51,489.45	\$51,489.45	2016	7/29/2016	1	SS09164C021	1	SMALL BUSINESS
ASSOCIATION FOR COMPUTING MACHINERY, INC.	ACCESS TO THE ASSOCIATION COMPUTING MACHINERY	\$16,824.00	\$51,486.11	2016	5/10/2016	SS001650127			0 OTHER THAN SMALL BUSINESS
NAOMI M KELLY	RMC - CASE REVIEWS IGF::CL::IGF CLOSELY ASSOCIATED	\$51,395.50	\$51,395.50	2015	3/26/2015	9	SS011140028		0 SMALL BUSINESS
PAZ, ANNETTE DE	ME EXPRESS REPORTING - MENTAL HEALTH IGF::CT::IGF	\$51,350.00	\$51,350.00	2015	9/30/2015	2015	SS10251120050		0 SMALL BUSINESS
SPITZNAGEL, RONALD	VE EXPRESS REPORTING IGF::CT::IGF	\$51,340.08	\$51,340.08	2015	9/30/2015	2015	SS10541140447		0 SMALL BUSINESS
ASSOCETES IN REHABILITATION MGT	ME EXPRESS REPORTING - MENTAL HEALTH IGF::CT::IGF	\$51,327.00	\$51,327.00	2015	9/30/2015	2015	SS10631150239		0 SMALL BUSINESS
ROSENSHIELD, PHILIP	IGF::CL::IGF CLOSELY ASSOCIATED - CALL ORDER FOR II	\$51,282.00	\$51,282.00	2016	7/7/2016	2	SS07164C021		0 SMALL BUSINESS
NOETIX CORPORATION	NOETIX FINANCIAL - SS00-16-50001	\$51,269.24	\$51,269.24	2017	10/5/2016	SS001750010			0 SMALL BUSINESS
NOETIX CORPORATION	RENEWAL OF SS00-15-50013 ON MAINTENANCE OF NOE	\$51,269.24	\$51,269.24	2016	10/8/2015	SS001650001			0 OTHER THAN SMALL BUSINESS
BONNIE SUE MARTINDALE	VE EXPRESS REPORTING IGF::CT::IGF	\$51,250.00	\$51,250.00	2015	9/30/2015	2015	SS11511180115		0 SMALL BUSINESS
HOWELL CONSULTING LLC	VE EXPRESS REPORTING IGF::CT::IGF	\$51,229.78	\$51,229.78	2015	9/30/2015	2015	SS10541440023		0 SMALL BUSINESS
THOMAS A GRZESIK & ASSOCIATES INC	ME EXPRESS REPORTING - MENTAL HEALTH IGF::CT::IGF	\$51,026.00	\$51,026.00	2015	9/30/2015	2015	SS10631150101		0 SMALL BUSINESS
DREAM MANAGEMENT, INC.	IGF::OT::IGF SS00-12-60085 EQUITABLE ADJUSTMENT	\$51,000.00	\$51,000.00	2015	9/17/2015	SS001260085			8 SMALL BUSINESS
SABREE, INC.	IGF::OT::IGF  REMOVAL OF EXISTING CARPET TILE, VINYL ASBESTOS FLOOR TILE (VAT) AND ASSOCIATED MASTIC IN ROOM GD-7 WEST HIGH RISE BUILDING.	\$50,933.68	\$50,933.68	2016	9/9/2016	SS001630701	SS001461113		0 SMALL BUSINESS
ROCK CREEK PUBLISHING GROUP	IGF::CT::IGF  CONTRACT SS00-10-60086 TASK ORDER 0014 - SSA WEBSITE HOSTING SERVICES	\$50,906.72	\$50,906.72	2015	8/8/2015	14	SS001060086		0 SMALL BUSINESS
BLASE, MD MARVIN	IGF::CL::IGF MEDICAL CONSULTANT SERVICES TO REVIEW	\$50,886.00	\$50,886.00	2017	11/25/2016	4	SS04164C100		0 SMALL BUSINESS
BUDA, FRANCIS B MD	IGF::CL::IGF MEDICAL CONSULTANT SERVICES TO REVIEW	\$50,886.00	\$50,886.00	2017	11/25/2016	5	SS04164C034		0 SMALL BUSINESS
MILTON FREEDMAN MD, INTERNAL MEDICINE	IGF::CL::IGF MEDICAL CONSULTANT SERVICES TO REVIEW	\$50,886.00	\$50,886.00	2017	11/23/2016	4	SS04164C040		0 SMALL BUSINESS
DALTON, CHARLES B	IGF::CL::IGF REGION 2 MEDICAL CONSULTANTS. REVIEWS BY MEDICAL CONSULTANT OF DISABILITY CLAIM CASE FILES FOR AGENCY DISABILITY PROGRAM. INCREASE QUANTITY CASE REVIEWS AND EXTEND PERIOD OF PERFORMANCE.	\$50,840.00	\$50,840.00	2016	6/22/2016	1	SS02164C009	3	SMALL BUSINESS

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SABREE, INC.	IGF::OT::IGF  MODIFICATION TO RENEGOTIATE CONTRACT CLINS RATES FOR ASBESTOS RENOVATION AND REMOVAL SERVICES AT THE SOCIAL SECURITY ADMINISTRATION HEADQUARTERS BUILDINGS AND OUTLYING BUILDINGS LOCATED IN BALTIMORE, MD.	\$0.00	\$50,775.28	2016	9/6/2016	SS001461113		5	SMALL BUSINESS
CLAUDE F PEACOCK	VE EXPRESS REPORTING IGF::CT::IGF	\$50,664.00	\$50,664.00	2015	9/30/2015		2015 SS10541140387	0	SMALL BUSINESS
DISABILITY MANAGEMENT NETWORK, LTD.	VE EXPRESS REPORTING IGF::CT::IGF	\$50,592.00	\$50,592.00	2015	9/30/2015		2015 SS10631150301	0	OTHER THAN SMALL BUSINESS
CORDES, DENISE D	VE EXPRESS REPORTING IGF::CT::IGF	\$50,501.00	\$50,501.00	2015	9/30/2015		2015 SS10381130233	0	SMALL BUSINESS
CAREER ASSOCIATES INC	VE EXPRESS REPORTING IGF::CT::IGF	\$50,404.00	\$50,404.00	2015	9/30/2015		2015 SS10881190203	0	OTHER THAN SMALL BUSINESS
MITCHELL REHABILITATION SERVICES	VE EXPRESS REPORTING IGF::CT::IGF	\$50,326.25	\$50,326.25	2015	9/30/2015		2015 SS10691170021	0	SMALL BUSINESS
ULINE, INC.	N/A SUPPLIES - PURCHASE ORDER SS00-15-50237 WITH I	\$50,308.73	\$50,308.73	2015	8/8/2015	SS001550237		0	OTHER THAN SMALL BUSINESS
TANENHAUS, HERBERT DR	ME EXPRESS REPORTING - MENTAL HEALTH IGF::CT::IGF	\$50,230.00	\$50,230.00	2015	9/30/2015		2015 SS10881190144	0	SMALL BUSINESS
PARKER & PARKER COUNSELING&CONSULTING AGENCY	VE EXPRESS REPORTING IGF::CT::IGF	\$50,177.00	\$50,177.00	2015	9/30/2015		2015 SS10781160341	0	SMALL BUSINESS
SMITH, LYNN	ME EXPRESS REPORTING - MENTAL HEALTH IGF::CT::IGF	\$50,159.00	\$50,159.00	2015	9/30/2015		2015 SS10631150207	0	SMALL BUSINESS
RESOLUTIONS, INC.	VE EXPRESS REPORTING IGF::CT::IGF	\$50,151.00	\$50,151.00	2015	9/30/2015		2015 SS10381130037	0	SMALL BUSINESS
ROSEN, RABIA	VE EXPRESS REPORTING IGF::CT::IGF	\$50,144.00	\$50,144.00	2015	9/30/2015		2015 SS10381130201	0	SMALL BUSINESS
OGREN, JESSE	ME EXPRESS REPORTING - MENTAL HEALTH IGF::CT::IGF	\$50,118.00	\$50,118.00	2015	9/30/2015		2015 SS10631150313	0	SMALL BUSINESS
CUNNINGHAM, ELIZABETH	VE EXPRESS REPORTING IGF::CT::IGF	\$50,059.00	\$50,059.00	2015	9/30/2015		2015 SS11511180037	0	SMALL BUSINESS
VANDERPLATE, CALVIN	IGF::CL::IGF MEDICAL CONSULTANT SERVICES TO REVIEW	\$50,040.00	\$50,040.00	2016	8/31/2016		2 SS04164C009	0	SMALL BUSINESS
BURGE, STEPHEN	IGF::CL::IGF MEDICAL CONSULTANT SERVICES TO REVIEW	\$50,040.00	\$50,040.00	2016	8/31/2016		4 SS04164C020	0	SMALL BUSINESS
THOMAS S ROWE MD	REQUEST FOR NEW CALL ORDER FOR CASES FOR T. ROWE IGF::CL::IGF	\$50,040.00	\$50,040.00	2016	3/23/2016		1 SS04164C047	0	SMALL BUSINESS
PACIFIC GAS AND ELECTRIC COMPANY	FHFB UTILITIES- GAS AND ELECTRIC (8/1/14 - 7/31/15) IGF::CT::IGF CRITICAL FUNCTIONS	\$50,000.00	\$50,000.00	2015	9/22/2015	SS091430001	GS00P07BSD0505	2	OTHER THAN SMALL BUSINESS
PHILADELPHIA, CITY OF	THE PURPOSE OF THIS ACQUISITION IS TO ISSUE A DELIV	\$50,000.00	\$50,000.00	2016	6/22/2016	SS031630007	GS00P08BSD0546	0	OTHER THAN SMALL BUSINESS
RICHARD T THIO MD	MEDICAL CONSULTANT SERVICES - PHYSICAL CASES CLOSELY ASSOCIATED TO INHERENTLY GOVERNMENTAL FUNCTION IGF::CL::IGF FOR CLOSELY ASSOCIATED	\$49,966.08	\$49,966.08	2015	4/29/2015		16 SS041140058	1	SMALL BUSINESS
DAVID CRYSTAL REHABILITATION, INC.	VE EXPRESS REPORTING IGF::CT::IGF	\$49,887.00	\$49,887.00	2015	9/30/2015		2015 SS10541140357	0	SMALL BUSINESS
NEWMAN, JOHN F	VE EXPRESS REPORTING IGF::CT::IGF	\$49,819.00	\$49,819.00	2015	9/30/2015		2015 SS10381130049	0	SMALL BUSINESS
BROWN, CORY A	IGF::CL::IGF MODIFICATION TO ADD CASES AND EXTEND	\$49,800.00	\$49,800.00	2016	8/2/2016		1 SS09164C033	1	SMALL BUSINESS
EDAC SYSTEMS, INC.	THE OFFICE OF TELECOMMUNICATIONS AND SYSTEMS O	\$49,752.28	\$49,752.28	2015	4/8/2015	SS001550107		0	SMALL BUSINESS
THOMAS VOCATIONAL CONSULTING	VE EXPRESS REPORTING IGF::CT::IGF	\$49,749.00	\$49,749.00	2015	9/30/2015		2015 SS10781160047	0	SMALL BUSINESS
JERALD EVERETT	VE EXPRESS REPORTING IGF::CT::IGF	\$49,726.71	\$49,726.71	2015	9/30/2015		2015 SS10541140187	0	SMALL BUSINESS
JAMES A. FULLILOVE, VE, INC.	VE EXPRESS REPORTING IGF::CT::IGF	\$49,710.62	\$49,710.62	2015	9/30/2015		2015 SS10781460020	0	SMALL BUSINESS
ROBERT STARACE DR	IGF::CL::IGF REGION 2 MEDICAL CONSULTANTS. REVIEWS BY MEDICAL CONSULTANT OF DISABILITY CLAIM CASE FILES FOR AGENCY DISABILITY PROGRAM.	\$49,704.00	\$49,704.00	2016	3/29/2016		1 SS02164C021	1	SMALL BUSINESS
CAMPION MD, ROBERT	IGF::CL::IGF REGION 2 MEDICAL CONSULTANTS. REVIEWS BY MEDICAL CONSULTANT OF DISABILITY CLAIM CASE FILES FOR AGENCY DISABILITY PROGRAM. INCREASE CASE QUANTITY TO CALL ORDER.	\$49,704.00	\$49,704.00	2016	4/11/2016		1 SS02164C003	1	SMALL BUSINESS
SUSAN RAPANT	VE EXPRESS REPORTING IGF::CT::IGF	\$49,698.00	\$49,698.00	2015	9/30/2015		2015 SS10781160087	0	SMALL BUSINESS
GOLDMAN, DONALD I MD	ME EXPRESS REPORTING - MENTAL HEALTH IGF::CT::IGF	\$49,650.00	\$49,650.00	2015	9/30/2015		2015 SS10251120080	0	SMALL BUSINESS
MASSEY, JAMMIE C	VE EXPRESS REPORTING IGF::CT::IGF	\$49,618.43	\$49,618.43	2015	9/30/2015		2015 SS11511180045	0	SMALL BUSINESS
GILMAN, MURRY J DR	ME EXPRESS REPORTING - MENTAL HEALTH IGF::CT::IGF	\$49,520.00	\$49,520.00	2015	9/30/2015		2015 SS10541140058	0	SMALL BUSINESS
WHITE, LESLIE J	VE EXPRESS REPORTING IGF::CT::IGF	\$49,450.00	\$49,450.00	2015	9/30/2015		2015 SS10781260012	0	SMALL BUSINESS
LEARNING FROM THE JOURNEY INC	IGF::CL::IGF CLOSELY ASSOCIATED - CALL ORDER FOR II	\$49,400.00	\$49,400.00	2016	9/1/2016		3 SS08164C013	0	SMALL BUSINESS
RIPP REHAB, INC.	VE EXPRESS REPORTING IGF::CT::IGF	\$49,361.00	\$49,361.00	2015	9/30/2015		2015 SS10881190205	0	SMALL BUSINESS
NORMA STRICKLIN LPC	VE EXPRESS REPORTING IGF::CT::IGF	\$49,351.84	\$49,351.84	2015	9/30/2015		2015 SS10541140417	0	SMALL BUSINESS
WILLIAM A CRUNK	VE EXPRESS REPORTING IGF::CT::IGF	\$49,284.32	\$49,284.32	2015	9/30/2015		2015 SS10541140273	0	SMALL BUSINESS



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Vendor Name	Description of Requirement	Action Obligation	Base and All Options Value	Fiscal Year	Date Signed	PO/Delivery Order/Task Order/Call#	Parent Contract	Mod #	Contracting Officers Business Size Selection
LAURA M ROSCH DR	IGF::CL::IGF REGION 5 MEDICAL CONSULTANTS. BLANKET PURCHASE AGREEMENTS FOR CONTRACTORS TO PROVIDE REGIONAL MEDICAL CONSULTANT SERVICES FOR THE SOCIAL SECURITY ADMINISTRATION. REVIEWS BY MEDICAL CONSULTANT OF DISABILITY CLAIM CASE FILES FOR AGENCY DISABILITY PROGRAM.	\$49,269.60	\$49,269.60	2016	7/19/2016	1	SS05164C022	0	SMALL BUSINESS
BOLDEN, KIELA	THIS IS TO FUND A NEW CALL ORDER FOR INDEPENDENT CASE REVIEWS AGAINST SS05-15-4C003, CALL ORDER 3, DR KIELA BOLDEN IGF::CL::IGF	\$49,269.60	\$49,269.60	2016	6/29/2016	3	SS05154C003	0	SMALL BUSINESS
YAPONDJIAN-ALVARADO, MARIA	TREGION V MEDICAL CONSULTANT SERVICES FOR THE SOCIAL SECURITY ADMINISTRATION. REVIEWS BY MEDICAL CONSULTANT OF DISABILITY CLAIM CASE FILES FOR AGENCY DISABILITY PROGRAM.. THIS IS TO FUND A NEW CALL ORDER FOR INDEPENDENT CASE REVIEWS AGAINST SS05-15-4C004, CALL ORDER 2, DR MARIA YAPONDJIAN-ALVARADO. IGF::CL::IGF	\$49,269.60	\$49,269.60	2016	6/29/2016	2	SS05154C004	0	SMALL BUSINESS
CINDY A HARRIS INC	VE EXPRESS REPORTING IGF::CT::IGF	\$49,252.00	\$49,252.00	2015	9/30/2015	2015	SS10781160097	0	SMALL BUSINESS
MILTON FREEDMAN MD, INTERNAL MEDICINE	MEDICAL CONTRACTOR SERVICES - PHYSICAL CASES CLOSELY ASSOCIATED TO INHERENTLY GOVERNMENTAL FUNCTION IGF::CL::IGF	\$49,206.00	\$49,206.00	2015	3/24/2015	15	SS041140040	1	SMALL BUSINESS
H. RUDOLPH WARREN, M.D., P.C.	MEDICAL CONTRACTOR SERVICES - MENTAL CASES CLOSELY ASSOCIATED TO INHERENTLY GOVERNMENTAL FUNCTION IGF::CL::IGF	\$49,206.00	\$49,206.00	2015	1/12/2015	12	SS041140062	0	SMALL BUSINESS
VANDERPLATE, CALVIN	MEDICAL CONTRACTOR SERVICES - MENTAL CASES CLOSELY ASSOCIATED TO INHERENTLY GOVERNMENTAL FUNCTION IGF::CL::IGF	\$49,206.00	\$49,206.00	2015	1/12/2015	14	SS041140065	0	SMALL BUSINESS
HAMMONDS, T MICHAEL PHD	MEDICAL CONTRACTOR SERVICES - MENTAL CASES CLOSELY ASSOCIATED TO INHERENTLY GOVERNMENTAL FUNCTION IGF::CL::IGF FOR CLOSELY ASSOCIATED	\$49,206.00	\$49,206.00	2015	12/11/2014	16	SS041140022	0	SMALL BUSINESS
BROOKS-WARREN M. D., JUANITA ANNETTE	MEDICAL CONTRACTOR SERVICES - MENTAL CASES CLOSLEY ASSOCIATED TO INHERENTLY GOVERNMENTAL FUNCTION IGF::CL::IGF	\$49,206.00	\$49,206.00	2015	4/27/2015	15	SS041040087	1	SMALL BUSINESS
FRANCIS B BUDA MD	MEDICAL CONTRACTOR SERVICES - PHYSICAL CASES CLOSELY ASSOCIATED TO INHERENTLY GOVERNMENTAL FUNCTION IGF::CL::IGF	\$49,206.00	\$49,206.00	2015	12/11/2014	18	SS041140055	0	SMALL BUSINESS
SCHRAEDER MD, PAUL L	IGF::CL::IGF RMC TO CONDUCT INDEPENDENT CASE REVIEWS. REVIEWS BY MEDICAL CONSULTANT OF DISABILITY CLAIM CASE FILES FOR AGENCY DISABILITY PROGRESS.	\$49,141.88	\$49,141.88	2016	7/15/2016	3	SS03154C012	0	SMALL BUSINESS
IRVIN S BELZER MD INC	ME EXPRESS REPORTING - MENTAL HEALTH IGF::CT::IGF	\$49,060.00	\$49,060.00	2015	9/30/2015	2015	SS10881190116	0	SMALL BUSINESS
STANLEY CONVERGENT SECURITY SOLUTIONS, INC.	IDS MAINTENANCE FOR 6 MONTHS FOR SSA OFFICES IN 4	\$49,026.00	\$49,026.00	2016	8/5/2016	SS021650003		1	OTHER THAN SMALL BUSINESS
KENNETH P FERRA	VE EXPRESS REPORTING IGF::CT::IGF	\$49,007.00	\$49,007.00	2015	9/30/2015	2015	SS10881190037	0	SMALL BUSINESS



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ZWI KAHANOWICZ MD	IGF::CL::IGF REGION 2 MEDICAL CONSULTANTS. REVIEWS BY MEDICAL CONSULTANT OF DISABILITY CLAIM CASE FILES FOR AGENCY DISABILITY PROGRAM.	\$48,972.00	\$48,972.00	2015	4/2/2015	6	SS021140088	0	SMALL BUSINESS
SPITZ, GARY FRANKLIN	IGF::CL::IGF REGION 2 MEDICAL CONSULTANTS. REVIEWS BY MEDICAL CONSULTANT OF DISABILITY CLAIM CASE FILES FOR AGENCY DISABILITY PROGRAM.	\$48,958.44	\$48,958.44	2016	1/29/2016	1	SS02164C020	0	SMALL BUSINESS
OLEN DODD	VE EXPRESS REPORTING IGF::CT::IGF	\$48,955.02	\$48,955.02	2015	9/30/2015	2015	SS10381130107	0	SMALL BUSINESS
HARDING, RANDALL	ME EXPRESS REPORTING - MENTAL HEALTH IGF::CT::IGF	\$48,910.00	\$48,910.00	2015	9/30/2015	2015	SS10631150111	0	SMALL BUSINESS
CHARLES POOR	VE EXPRESS REPORTING IGF::CT::IGF	\$48,851.00	\$48,851.00	2015	9/30/2015	2015	SS10781160181	0	SMALL BUSINESS
JUDITH K VOGELSANG	IGF::CL::IGF CLOSELY ASSOCIATED - CALL ORDER FOR I	\$48,840.00	\$48,840.00	2016	6/30/2016	1	SS07164C028	0	SMALL BUSINESS
JUDY L PANEK MD	IGF::CL::IGF CLOSELY ASSOCIATED - CALL ORDER FOR I	\$48,840.00	\$48,840.00	2016	8/22/2016	2	SS07164C018	0	SMALL BUSINESS
SEN, SANDIP	IGF::CL::IGF CLOSELY ASSOCIATED - REGIONAL MEDICA	\$48,840.00	\$48,840.00	2016	4/20/2016	1	SS07164C023	0	SMALL BUSINESS
LEMERIDEL INC	IGF::CL::IGF CLOSELY ASSOCIATED - REGIONAL MEDICA	\$48,840.00	\$48,840.00	2016	4/19/2016	1	SS07164C013	0	SMALL BUSINESS
BRAMLETT & ASSOCIATES	VE EXPRESS REPORTING IGF::CT::IGF	\$48,789.33	\$48,789.33	2015	9/30/2015	2015	SS10541140523	0	SMALL BUSINESS
MICHAEL E CARNEY PSYCHOLOGST	ME EXPRESS REPORTING - MENTAL HEALTH IGF::CT::IGF	\$48,770.00	\$48,770.00	2015	9/30/2015	2015	SS10631150078	0	SMALL BUSINESS
KATSELL, NELLY	VE EXPRESS REPORTING IGF::CT::IGF	\$48,761.00	\$48,761.00	2015	9/30/2015	2015	SS10881190069	0	SMALL BUSINESS
MOGHBELI, HOMAYOON	IGF::CL::IGF OMA MEDICAL CONSULTANTS. REVIEWS BY MEDICAL CONSULTANT OF DISABILITY CLAIM CASE FILES FOR AGENCY DISABILITY PROGRAM.	\$48,750.00	\$48,750.00	2016	5/25/2016	1	SS00164C067	0	SMALL BUSINESS
SMITH CHARLES & ASSOCIATES	VE EXPRESS REPORTING IGF::CT::IGF	\$48,721.59	\$48,721.59	2015	9/30/2015	2015	SS10781160277	0	SMALL BUSINESS
MAGROWSKI, JEFFREY F PHD	VE EXPRESS REPORTING IGF::CT::IGF	\$48,653.71	\$48,653.71	2015	9/30/2015	2015	SS10691170063	0	SMALL BUSINESS
ALLAN M ROTHENDERG MD	ME EXPRESS REPORTING - MENTAL HEALTH IGF::CT::IGF	\$48,620.00	\$48,620.00	2015	9/30/2015	2015	SS10251120074	0	SMALL BUSINESS
C TIMOTHY BESSENT	IGF::CL::IGF MEDICAL CONSULTANT CONTRACTORS BLANKET PURCHASE AGREEMENT	\$48,600.00	\$48,600.00	2015	2/5/2015	5	SS001140134	0	SMALL BUSINESS
TOLLEY, LINDA P	VE EXPRESS REPORTING IGF::CT::IGF	\$48,486.00	\$48,486.00	2015	9/30/2015	2015	SS10881190013	0	SMALL BUSINESS
C E WHEELER AND ASSOCIATES	VE EXPRESS REPORTING IGF::CT::IGF	\$48,426.00	\$48,426.00	2015	9/30/2015	2015	SS10541240017	0	SMALL BUSINESS
BATTIS, SANDRA D MD	IGF::CL::IGF MODIFICATION TO ADD CASES AND EXTEND	\$48,372.00	\$48,372.00	2016	7/28/2016	1	SS09164C017	1	SMALL BUSINESS
MMD CONSULTING INC	VE EXPRESS REPORTING IGF::CT::IGF	\$48,359.80	\$48,359.80	2015	9/30/2015	2015	SS10631350025	0	SMALL BUSINESS
KRAMER VOCATIONAL SERVICES, LLC	VE EXPRESS REPORTING IGF::CT::IGF	\$48,358.70	\$48,358.70	2015	9/30/2015	2015	SS10541140245	0	SMALL BUSINESS
WORK AND LIFE ADJUSTMENT OPTIONS, LLC	VE EXPRESS REPORTING IGF::CT::IGF	\$48,301.00	\$48,301.00	2015	9/30/2015	2015	SS10541140161	0	SMALL BUSINESS
VOCATIONAL CONSULTING SERVICES INC	VE EXPRESS REPORTING IGF::CT::IGF	\$48,281.00	\$48,281.00	2015	9/30/2015	2015	SS11511180035	0	SMALL BUSINESS
KUTSCHBACH, AMY	ME EXPRESS REPORTING - MENTAL HEALTH IGF::CT::IGF	\$48,265.00	\$48,265.00	2015	9/30/2015	2015	SS10631150151	0	SMALL BUSINESS
CHOPRA, MD, ARVIND	IGF::CL::IGF REGION 2 MEDICAL CONSULTANTS. REVIEWS BY MEDICAL CONSULTANT OF DISABILITY CLAIM CASE FILES FOR AGENCY DISABILITY PROGRAM.	\$48,252.00	\$48,252.00	2015	12/15/2014	9	SS021040027	0	SMALL BUSINESS
TIERSTEN, DAIVD, M.D.	IGF::CL::IGF REGION 2 MEDICAL CONSULTANTS. REVIEWS BY MEDICAL CONSULTANT OF DISABILITY CLAIM CASE FILES FOR AGENCY DISABILITY PROGRAM.	\$48,252.00	\$48,252.00	2015	12/5/2014	10	SS021040026	0	SMALL BUSINESS
BRENT, LAVONNE	VE EXPRESS REPORTING IGF::CT::IGF	\$48,225.92	\$48,225.92	2015	9/30/2015	2015	SS10541340027	0	SMALL BUSINESS
SABREE, INC.	IGF::OT::IGF ASBESTOS ABATEMENT - 1ST, 2ND, 3RD FLO	\$48,202.40	\$48,202.40	2016	9/14/2016	SS001630750	SS001461113	0	SMALL BUSINESS
LIFE WORK CONSULTING, INC.	VE EXPRESS REPORTING IGF::CT::IGF	\$48,157.00	\$48,157.00	2015	9/30/2015	2015	SS11511180053	0	SMALL BUSINESS
JARED FRAZIN MD	ME EXPRESS REPORTING - MENTAL HEALTH IGF::CT::IGF	\$48,150.00	\$48,150.00	2015	9/30/2015	2015	SS10631150060	0	SMALL BUSINESS
MENKEN, MARY ELLEN	IGF::CL::IGF - SS01-16-4C014 MENKEN, MARY ELLEN -REC	\$48,084.00	\$48,084.00	2016	2/13/2016	1	SS01164C014	0	SMALL BUSINESS
HOLLENBECK, LEANNA	VE EXPRESS REPORTING IGF::CT::IGF	\$48,019.53	\$48,019.53	2015	9/30/2015	2015	SS10541140247	0	SMALL BUSINESS
CHICAGO SOFT, LTD.	CHICAGO SOFTWARE MVS/QUICK-REF SOFTWARE 180 D	\$48,000.00	\$48,000.00	2015	2/23/2015	SS001550081		0	SMALL BUSINESS
HEALTH & HUMAN SERVICES, MICHIGAN DEPARTMENT OF	IGF::CL::IGF REQUESTING MISSING OR UNREPORTED DE	\$48,000.00	\$48,000.00	2016	8/8/2016	SS001660019		0	OTHER THAN SMALL BUSINESS
MOGUL, ROBERT	INDEPENDENT CASE REVIEWS. THE PURPOSE OF THIS CALL ORDER IS TO ADD INDEPENDENT CASE REVIEWS FOR REVIEW BY THE CONTRACTOR. IGF::CL::IGF	\$48,000.00	\$48,000.00	2016	3/16/2016	3	SS03154C019	0	SMALL BUSINESS
INTERNET SYSTEMS CONSORTIUM, INC.	INTERNET SYSTEMS CONSORTIUM BIND (BERKELEY INTE	\$48,000.00	\$48,000.00	2015	3/16/2015	SS001550087		0	OTHER THAN SMALL BUSINESS
CENTER FOR ESSENTIAL MGT SVCS	VE EXPRESS REPORTING IGF::CT::IGF	\$47,985.00	\$47,985.00	2015	9/30/2015	2015	SS10251120047	0	OTHER THAN SMALL BUSINESS
BORDELON, LIONEL J	VE EXPRESS REPORTING IGF::CT::IGF	\$47,973.00	\$47,973.00	2015	9/30/2015	2015	SS10781160227	0	SMALL BUSINESS

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SIMONE, DANIEL	VE EXPRESS REPORTING IGF::CT::IGF	\$47,920.00	\$47,920.00	2015	9/30/2015	2015	SS10631450007	0	SMALL BUSINESS
LEBEAU, JACK	ME EXPRESS REPORTING - MENTAL HEALTH IGF::CT::IGF	\$47,690.00	\$47,690.00	2015	9/30/2015	2015	SS10381130090	0	OTHER THAN SMALL BUSINESS
BRADY, CLIFFORD M	VE EXPRESS REPORTING IGF::CT::IGF	\$47,632.00	\$47,632.00	2015	9/30/2015	2015	SS10631150057	0	SMALL BUSINESS
SCHMITT, MARILYN T	VE EXPRESS REPORTING IGF::CT::IGF	\$47,570.00	\$47,570.00	2015	9/30/2015	2015	SS10541140205	0	SMALL BUSINESS
AROON SUANSILPPONGSE DR	PERIOD OF PERFORMANCE- 04/01/2016 TO 07/31/2016. THE CONTRACTOR SHALL COMPLETE INDEPENDENT CASE REVIEWS IN ACCORDANCE WITH TERMS AND CONDITIONS SET FORTH IN THE RMC BPA. IGF::CL::IGF	\$47,556.00	\$47,556.00	2016	3/17/2016	2	SS03154C017	0	SMALL BUSINESS
RICHARD BABKES MD	ME EXPRESS REPORTING - MENTAL HEALTH IGF::CT::IGF	\$47,550.00	\$47,550.00	2015	9/30/2015	2015	SS10111100001	0	SMALL BUSINESS
NORMAN VOCATIONAL SERVICES INC	ME EXPRESS REPORTING - MENTAL HEALTH IGF::CT::IGF	\$47,519.00	\$47,519.00	2015	9/30/2015	2015	SS10631150227	0	SMALL BUSINESS
CHRISTENSEN VOCATIONAL SERVICES	VE EXPRESS REPORTING IGF::CT::IGF	\$47,515.63	\$47,515.63	2015	9/30/2015	2015	SS11511180027	0	SMALL BUSINESS
RENNER, LISA	INDEPENDENT CASE REVIEWS DR. SWEETMAN (AUDIOLOGIST) REGION 8 IGF::CL::IGF	\$47,500.00	\$47,500.00	2016	2/4/2016	1	SS08164C019	1	SMALL BUSINESS
DUMAS, BRENDA E	VE EXPRESS REPORTING IGF::CT::IGF	\$47,481.24	\$47,481.24	2015	9/30/2015	2015	SS10541140251	0	SMALL BUSINESS
MANZANITA INC	VE EXPRESS REPORTING IGF::CT::IGF	\$47,460.00	\$47,460.00	2015	9/30/2015	2015	SS11511180041	0	SMALL BUSINESS
BENOIT, ROXANNE	VE EXPRESS REPORTING IGF::CT::IGF	\$47,447.00	\$47,447.00	2015	9/30/2015	2015	SS10631350029	0	SMALL BUSINESS
KARANDE MD, MEGHANA C	IGF::CL::IGF CLOSELY ASSOCIATED MODIFICATION ADDS 600 INDEPENDENT CASE REVIEWS AT \$79.07 PER CASE FOR A TOTAL INCREASE OF \$47,442.00.	\$47,442.00	\$47,442.00	2015	8/20/2015	11	SS011140019	1	SMALL BUSINESS
DENNIS, MICHAEL W. MD	ME EXPRESS REPORTING - MENTAL HEALTH IGF::CT::IGF	\$47,410.00	\$47,410.00	2015	9/30/2015	2015	SS10111100013	0	SMALL BUSINESS
LINDAHL & SANTNER	VE EXPRESS REPORTING IGF::CT::IGF	\$47,320.25	\$47,320.25	2015	9/30/2015	2015	SS10691170101	0	SMALL BUSINESS
M L BIJPURIA MD, FACS	IGF::CL::IGF OMA MEDICAL CONSULTANTS. REVIEWS BY MEDICAL CONSULTANT OF DISABILITY CLAIM CASE FILES FOR AGENCY DISABILITY PROGRAM. ADDING 550 CASE REVIEWS.	\$47,300.00	\$47,300.00	2016	9/7/2016	1	SS00164C004	1	SMALL BUSINESS
WALDRUP, CHARLES L	VE EXPRESS REPORTING IGF::CT::IGF	\$47,270.00	\$47,270.00	2015	9/30/2015	2015	SS10541140243	0	SMALL BUSINESS
BERKOWITZ, MARK PSY D	IGF::CL::IGF CLOSELY ASSOCIATED - REGIONAL MEDICAL	\$47,240.00	\$47,240.00	2016	12/17/2015	3	SS08164C001	0	SMALL BUSINESS
BERKOWITZ, MARK PSY D	IGF::CL::IGF CLOSELY ASSOCIATED - REGIONAL MEDICAL	\$47,240.00	\$47,240.00	2016	4/28/2016	3	SS08164C001	1	SMALL BUSINESS
HEALTH, NEW MEXICO DEPARTMENT OF	IGF::CL::IGF CLOSELY ASSOCIATED DC SS00-12-60019 ELECTRONIC DEATH REGISTRATION DELIVERY ORDER. 17,000 EDR RECORDS TOTAL DELIVERY ORDER \$47,175.00. PERIOD OF PERFORMANCE 1/01/2016 - 12/31/2016.	\$47,175.00	\$47,175.00	2016	12/30/2015	5	SS001260032	0	OTHER THAN SMALL BUSINESS
HEALTH AND HUMAN SERVICES, NEBRASKA DEPARTMENT OF	IGF::CL::IGF CLOSELY ASSOCIATED NE SS00-12-60028 ELECTRONIC DEATH REGISTRATION DELIVERY ORDER. 17,000 EDR RECORDS TOTAL DELIVERY ORDER \$47,175.00. PERIOD OF PERFORMANCE 1/01/2016 - 12/31/2016.	\$47,175.00	\$47,175.00	2016	12/22/2015	5	SS001260028	0	OTHER THAN SMALL BUSINESS
BROOKS-WARREN M. D., JUANITA ANNETTE	MEDICAL CONTRACTOR SERVICES - MENTAL CASES CLOSLEY ASSOCIATED TO INHERENTLY GOVERNMENTAL FUNCTION IGF::CL::IGF	\$47,155.75	\$47,155.75	2015	2/9/2015	15	SS041040087	0	SMALL BUSINESS
NOA GLOBAL, INC.	VE EXPRESS REPORTING IGF::CT::IGF	\$47,126.00	\$47,126.00	2015	9/30/2015	2015	SS10691170067	0	SMALL BUSINESS
CARL BANCOFF MD	INDEPENDENT CASE REVIEWS IGF::CL::IGF	\$47,100.00	\$47,100.00	2016	3/15/2016	2	SS03154C022	0	SMALL BUSINESS
VOCATIONAL DEVELOPMENT RESOURCES LLC	VE EXPRESS REPORTING IGF::CT::IGF	\$47,090.00	\$47,090.00	2015	9/30/2015	2015	SS10631350031	0	SMALL BUSINESS

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THE AXON GROUP	PERIOD OF PERFORMANCE- 4/1/2016-7/31/2016 THE CONTRACTOR SHALL COMPLETE INDEPENDENT CASE REVIEWS IN ACCORDANCE WITH THE TERMS AND CONDITIONS SET FORTH IN HIS RMC BPA IGF::CL::IGF	\$47,046.00	\$47,046.00	2016	3/16/2016	3	SS03154C020	0	SMALL BUSINESS
DISABILITY & WORKFORCE CONSULTING, L.L.C.	VE EXPRESS REPORTING IGF::CT::IGF	\$47,019.00	\$47,019.00	2015	9/30/2015	2015	SS11511180055	0	SMALL BUSINESS
GEORGE BRIAN PAPROCKI	VE EXPRESS REPORTING IGF::CT::IGF	\$46,983.40	\$46,983.40	2015	9/30/2015	2015	SS10691170095	0	SMALL BUSINESS
IRVIN J ROTH	VE EXPRESS REPORTING IGF::CT::IGF	\$46,918.00	\$46,918.00	2015	9/30/2015	2015	SS10541140397	0	SMALL BUSINESS
CIVILS, DEBRA G	VE EXPRESS REPORTING IGF::CT::IGF	\$46,872.92	\$46,872.92	2015	9/30/2015	2015	SS10541140401	0	SMALL BUSINESS
NIELSON JR, SCOTT K	VE EXPRESS REPORTING IGF::CT::IGF	\$46,871.00	\$46,871.00	2015	9/30/2015	2015	SS10881190113	0	SMALL BUSINESS
DELMAR REHABILITATION	ME EXPRESS REPORTING - MENTAL HEALTH IGF::CT::IGF	\$46,847.60	\$46,847.60	2015	9/30/2015	2015	SS10631150079	0	SMALL BUSINESS
SNOWBOUND SOFTWARE CORPORATION	RENEWAL OF SS00-16-50024 FOR MAINTENANCE ON SN	\$46,839.58	\$46,839.58	2017	11/30/2016	SS001750028		0	SMALL BUSINESS
SNOWBOUND SOFTWARE CORPORATION	SNOWBOUND SOFTWARE MAINTENANCE RENEWAL	\$46,839.58	\$46,839.58	2016	11/30/2015	SS001650024		0	SMALL BUSINESS
PETER L LEE MD	IGF::CL::IGF  REGION 9 MEDICAL CONSULTANTS. REVIEWS BY MEDICAL CONSULTANT OF DISABILITY CLAIM CASE FILES FOR AGENCY DISABILITY PROGRAM. CALL ORDER TO AWARD PETER LEE 550 CASES AND 10 NON-CASE HOURS.	\$46,836.30	\$46,836.30	2016	2/29/2016	1	SS09164C028	0	SMALL BUSINESS
MC DEVITT, ROBERT JOHN	ME EXPRESS REPORTING - MENTAL HEALTH IGF::CT::IGF	\$46,830.00	\$46,830.00	2015	9/30/2015	2015	SS11521100040	0	SMALL BUSINESS
JOHN F MCGOWAN	VE EXPRESS REPORTING IGF::CT::IGF	\$46,828.00	\$46,828.00	2015	9/30/2015	2015	SS10691170039	0	SMALL BUSINESS
SMITH CYNTHIA NASEEM MD	IGF::CL::IGF CLOSELY ASSOCIATED - CALL ORDER FOR II	\$46,800.00	\$46,800.00	2016	7/15/2016	2	SS08154C001	0	SMALL BUSINESS
A. STEPHEN GENEST MD	ME EXPRESS REPORTING - MENTAL HEALTH IGF::CT::IGF	\$46,790.00	\$46,790.00	2015	9/30/2015	2015	SS10881390002	0	SMALL BUSINESS
OPEX CORPORATION	THE PURPOSE OF THIS AWARD IS TO PROVIDE PREVENTATIVE MAINTENANCE AND REPAIR ON TWO (2) OPEX MODEL PS51 RAPID EXTRACTION DESKS (SERIAL # 12719, 15138) AND ONE (1) OMATION 306 LETTER OPENER (SERIAL #ZE1045) FOR 1 BASE YEAR AND 4 OPTION YEARS.IGF::OT::IGF  PERIOD OF PERFORMANCE:	\$8,496.44	\$46,776.68	2016	7/5/2016	SS031650007		0	SMALL BUSINESS
ANDRE, TOBEY	VE EXPRESS REPORTING IGF::CT::IGF	\$46,765.80	\$46,765.80	2015	9/30/2015	2015	SS106311450019	0	SMALL BUSINESS
MARIANNE K LUMPE	VE EXPRESS REPORTING IGF::CT::IGF	\$46,646.00	\$46,646.00	2015	9/30/2015	2015	SS10691170087	0	SMALL BUSINESS
CORTEZ, JENNIFER A	IGF::CL::IGF REGION 2 MEDICAL CONSULTANTS. REVIEWS BY MEDICAL CONSULTANT OF DISABILITY CLAIM CASE FILES FOR AGENCY DISABILITY PROGRAM. MODIFICATION TO INCREASE QUANTITY.	\$46,637.50	\$46,637.50	2016	12/8/2015	5	SS021240005	2	SMALL BUSINESS
BROADSPIRE SERVICES INC	VE EXPRESS REPORTING IGF::CT::IGF	\$46,538.00	\$46,538.00	2015	9/30/2015	2015	SS10881190183	0	OTHER THAN SMALL BUSINESS
HPI/GSA - 2B, L.P.	IGF::OT::IGF DAYTIME CLEANING SERVICES	\$46,446.45	\$46,446.45	2015	3/20/2015	SS061550002		0	SMALL BUSINESS
CHRISTINA BEATTY-CODY	VE EXPRESS REPORTING IGF::CT::IGF	\$46,414.37	\$46,414.37	2015	9/30/2015	2015	SS10381130017	0	SMALL BUSINESS
COMPREHENSIVE REHABILITATION SERVICES	VE EXPRESS REPORTING IGF::CT::IGF	\$46,368.00	\$46,368.00	2015	9/30/2015	2015	SS10781260014	0	SMALL BUSINESS
COYLE, JOANNE	IGF::CL::IGF CLOSELY ASSOCIATED SS01-11-40002 CALL ORDER 0010 - COYLE, JOANNE - FOR 586 CASES FOR THE PERIOD 1/25/2016 - 3/31/2016. THE RATE OF PAY IS \$79.07 PER CASE FOR TOTAL FUNDING NEEDS OF \$46,335.02.	\$46,335.02	\$46,335.02	2016	1/20/2016	10	SS011140002	0	SMALL BUSINESS
SOFTWARE AG GOVERNMENT SOLUTIONS INC.	RENEWAL AND CO-TERMINATION OF SS00-15-30015 AND	\$46,290.86	\$46,290.86	2015	8/27/2015	SS001550256		0	OTHER THAN SMALL BUSINESS
JERRY A OLSHESKI	VE EXPRESS REPORTING IGF::CT::IGF	\$46,250.00	\$46,250.00	2015	9/30/2015	2015	SS10631150015	0	SMALL BUSINESS
STEVEN P BOWERS	IGF::CL::IGF  MEDICAL CONSULTANT SERVICES	\$46,222.15	\$46,222.15	2015	1/5/2015	19	SS061140039	0	SMALL BUSINESS
JOHNSON CONTROLS, INC.	METASYS AUTOMATIC REDUNDANCY SOFTWARE, INSTALLATION SERVICES, AND SERVERS UPGRADE  IGF::OT::IGF	\$46,192.36	\$46,192.36	2015	9/20/2015	SS001550306		0	OTHER THAN SMALL BUSINESS

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Vendor Name	Description of Requirement	Action Obligation	Base and All Options Value	Fiscal Year	Date Signed	PO/Delivery Order/Task Order/Call#	Parent Contract	Mod #	Contracting Officers Business Size Selection
A G M CONSULTING	VE EXPRESS REPORTING IGF::CT::IGF	\$46,035.00	\$46,035.00	2015	9/30/2015	2015	SS10781160189	0	SMALL BUSINESS
HEALTH AND HUMAN SERVICES, NEBRASKA DEPARTMENT OF	IGF::OT::IGF OTHER FUNCTIONS NE RECEIPT OF ELECTRONIC DEATH RECORDS FOR OPTION YEAR III PERIOD OF PERFORMANC JANUARY 1, 2015 - DECEMBER 31, 2015.	\$45,985.00	\$45,985.00	2015	12/22/2014	4	SS001260028	0	OTHER THAN SMALL BUSINESS
HEALTH, NEW MEXICO DEPARTMENT OF	IGF::OT::IGF OTHER FUNCTIONS NM RECEIPT OF ELECTRONIC DEATH RECORDS FOR OPTION YEAR III PERIOD OF PERFORMANCE JANUARY 1, 2015 - DECEMBER 31, 2015.	\$45,985.00	\$45,985.00	2015	12/30/2014	4	SS001260032	0	OTHER THAN SMALL BUSINESS
FLOYD J MASSEY	VE EXPRESS REPORTING IGF::CT::IGF	\$45,937.15	\$45,937.15	2015	9/30/2015	2015	SS10781160149	0	SMALL BUSINESS
DEBORJA, JACINTO MD	OMA MEDICAL CONSULTANTS. REVIEWS BY MEDICAL CONSULTANT OF DISABILITY CLAIM CASE FILES FOR AGENCY DISABILITY PROGRAM. AWARDING DR. DEBORJA INDEPENDENT CASE REVIEWS AND NON-CASE SERVICES. IGF::CL::IGF	\$45,875.00	\$45,875.00	2016	5/31/2016	1	SS00164C058	0	SMALL BUSINESS
OCCUPATIONAL CONSULTING, LLC	VE EXPRESS REPORTING IGF::CT::IGF	\$45,866.00	\$45,866.00	2015	9/30/2015	2015	SS10541140477	0	SMALL BUSINESS
ARIEL CINTRON ANTOMMARCHI	VE EXPRESS REPORTING IGF::CT::IGF	\$45,821.00	\$45,821.00	2015	9/30/2015	2015	SS10251120120	0	OTHER THAN SMALL BUSINESS
SYPHER, DAVID	VE EXPRESS REPORTING IGF::CT::IGF	\$45,775.00	\$45,775.00	2015	9/30/2015	2015	SS10251120013	0	SMALL BUSINESS
SPRONG, MATTHEW E.	VE EXPRESS REPORTING IGF::CT::IGF	\$45,765.00	\$45,765.00	2015	9/30/2015	2015	SS10631250014	0	SMALL BUSINESS
MYERS, DANIEL E	VE EXPRESS REPORTING IGF::CT::IGF	\$45,713.00	\$45,713.00	2015	9/30/2015	2015	SS10541140227	0	SMALL BUSINESS
ELLIOTT J GOYTIA, MD, MA	IGF::CL::IGF REGION 2 MEDICAL CONSULTANTS. REVIEWS BY MEDICAL CONSULTANT OF DISABILITY CLAIM CASE FILES FOR AGENCY DISABILITY PROGRAM.	\$45,707.20	\$45,707.20	2015	2/20/2015	12	SS021140083	0	SMALL BUSINESS
CARPENTER, STEPHEN D M ED	VE EXPRESS REPORTING IGF::CT::IGF	\$45,695.00	\$45,695.00	2015	9/30/2015	2015	SS10541140533	0	SMALL BUSINESS
SABREE, INC.	IGF::OT::IGF ASBESTOS ABATEMENT FOR SSA WEST HIGH	\$45,665.97	\$45,665.97	2016	9/9/2016	SS001630688	SS001461113	0	SMALL BUSINESS
LAURENCE HUGHES	VE EXPRESS REPORTING IGF::CT::IGF	\$45,622.00	\$45,622.00	2015	9/30/2015	2015	SS10881190007	0	SMALL BUSINESS
MARY JONES	MEDICAL CONSULTANT SERVICES MARY JONES IGF::CL::IGF	\$45,620.00	\$45,620.00	2016	3/14/2016	1	SS05164C033	0	SMALL BUSINESS
NEAL BENTE MD	THIS IS TO FUND A NEW CALL ORDER FOR INDEPENDENT CASE REVIEWS AGAINST SS05-16-4C003, CALL ORDER 2, DR NEAL BENTE IGF::CL::IGF	\$45,620.00	\$45,620.00	2016	6/29/2016	2	SS05164C003	0	SMALL BUSINESS
TERRY, KIMBERLEE R	IGF::CL::IGF CLOSELY ASSOCIATED NEW CALL ORDER FC	\$45,600.00	\$45,600.00	2016	12/29/2015	1	SS08164C025	0	SMALL BUSINESS
WILLIAMS, SONIA	IGF::CL::IGF OMA MEDICAL CONSULTANTS. REVIEWS BY MEDICAL CONSULTANT OF DISABILITY CLAIM CASE FILES FOR AGENCY DISABILITY PROGRAM. ADDING CASE REVIEWS AND NON-CASE SERVICES.	\$45,600.00	\$45,600.00	2016	9/12/2016	1	SS00164C052	1	SMALL BUSINESS
LOCUM, INC.	IGF::CT::IGF CLOSELY ASSOCIATED - MEDICAL CONSULTA	\$45,600.00	\$45,600.00	2016	5/24/2016	3	SS08154C003	0	SMALL BUSINESS
HORTON MECHANICAL CONTRACTORS, INC.	IGF::CT::IGF ALTMAYER BOILERS #1-4 REPAIRS, CALIBRAT	\$45,500.00	\$45,500.00	2016	1/15/2016	SS001650057		0	SMALL BUSINESS
ALICE D COX	VE EXPRESS REPORTING IGF::CT::IGF	\$45,230.00	\$45,230.00	2015	9/30/2015	2015	SS10781160014	0	SMALL BUSINESS
DAVID O. HILL, PH.D., P.A.	IGF::CL::IGF CLOSELY ASSOCIATED - REGIONAL MEDICAL	\$45,177.00	\$45,177.00	2016	5/16/2016	2	SS07164C006	0	SMALL BUSINESS
CORTEZ, JENNIFER A	IGF::CL::IGF REGION 2 MEDICAL CONSULTANTS. REVIEWS BY MEDICAL CONSULTANT OF DISABILITY CLAIM CASE FILES FOR AGENCY DISABILITY PROGRAM.	\$45,175.00	\$45,175.00	2015	12/5/2014	4	SS021240005	0	SMALL BUSINESS
TURNER, MARCIA	MEDICAL CONSULTANT SERVICES - PHYSICAL CASES CLOSELY ASSOCIATED TO INHERENTLY GOVERNMENTAL FUNCTION IGF::CL::IGF FOR CLOSELY ASSOCIATED	\$45,105.50	\$45,105.50	2015	6/23/2015	14	SS041140046	0	SMALL BUSINESS
MILTON FREEDMAN MD, INTERNAL MEDICINE	MEDICAL CONTRACTOR SERVICES - PHYSICAL CASES CLOSELY ASSOCIATED TO INHERENTLY GOVERNMENTAL FUNCTION IGF::CL::IGF	\$45,105.50	\$45,105.50	2015	12/11/2014	15	SS041140040	0	SMALL BUSINESS

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Vendor Name	Description of Requirement	Action Obligation	Base and All Options Value	Fiscal Year	Date Signed	PO/Delivery Order/Task Order/Call#	Parent Contract	Mod #	Contracting Officers Business Size Selection
BURKE, MARGARET	IGF::CL::IGF RMC TO CONDUCT INDEPENDENT CASE REVIEWS. REVIEWS BY MEDICAL CONSULTANT OF DISABILITY CLAIM CASE FILES FOR AGENCY DISABILITY PROGRESS.	\$45,100.00	\$45,100.00	2016	7/15/2016	2	SS03154C016	0	SMALL BUSINESS
VOCATIONAL REHABILITATION ASSOCIATES, INC	ME EXPRESS REPORTING - MENTAL HEALTH IGF::CT::IGF	\$45,095.00	\$45,095.00	2015	9/30/2015	2015	SS10631150231	0	SMALL BUSINESS
FARRELL, TIMOTHY J MS	VE EXPRESS REPORTING IGF::CT::IGF	\$45,004.00	\$45,004.00	2015	9/30/2015	2015	SS10881390035	0	SMALL BUSINESS
ARNOLD, CHARLES O II	IGF::CL::IGF CLOSELY ASSOCIATED -NEW CALL ORDER F	\$45,000.00	\$45,000.00	2016	2/23/2016	1	SS08164C003	1	SMALL BUSINESS
JESUS DUARTE	VE EXPRESS REPORTING IGF::CT::IGF	\$44,983.00	\$44,983.00	2015	9/30/2015	2015	SS10781160209	0	OTHER THAN SMALL BUSINESS
JAMES S. WADDINGTON	VE EXPRESS REPORTING IGF::CT::IGF	\$44,936.00	\$44,936.00	2015	9/30/2015	2015	SS10541140703	0	SMALL BUSINESS
GEORGE K GANAWAY, MD, PC	REGIONAL MEDICAL ADVISOR - CASE REVIEWS&CONSULTING SERVICES IGF::CL::IGF	\$44,928.60	\$44,928.60	2015	12/18/2014	10	SS041140071	0	SMALL BUSINESS
LEONG MD PA, DOROTHY A.	IGF::CL::IGF LEONG - CALL ORDER - CASES	\$44,880.00	\$44,880.00	2015	5/12/2015	2	SS061440034	1	SMALL BUSINESS
UTITIES REHABILITATION SVC	ME EXPRESS REPORTING - MENTAL HEALTH IGF::CT::IGF	\$44,826.00	\$44,826.00	2015	9/30/2015	2015	SS10631150271	0	SMALL BUSINESS
LEAF, LEIF E. PHD	IGF::CL::IGF CLOSELY ASSOCIATED - REGIONAL MEDICA	\$44,770.00	\$44,770.00	2016	3/16/2016	1	SS07164C011	0	SMALL BUSINESS
GUEDIRI, JENNIFER	VE EXPRESS REPORTING IGF::CT::IGF	\$44,734.00	\$44,734.00	2015	9/30/2015	2015	SS10541240019	0	SMALL BUSINESS
CONROY, DENNIS P	VE EXPRESS REPORTING IGF::CT::IGF	\$44,710.10	\$44,710.10	2015	9/30/2015	2015	SS10541140349	0	SMALL BUSINESS
WISEMAN, MICHAEL	VE EXPRESS REPORTING IGF::CT::IGF	\$44,681.00	\$44,681.00	2015	9/30/2015	2015	SS10781160271	0	SMALL BUSINESS
DIDIO, DARYL	ME EXPRESS REPORTING - MENTAL HEALTH IGF::CT::IGF	\$44,660.00	\$44,660.00	2015	9/30/2015	2015	SS10251120022	0	SMALL BUSINESS
SHELTON REHAB CONSULTING	VE EXPRESS REPORTING IGF::CT::IGF	\$44,608.02	\$44,608.02	2015	9/30/2015	2015	SS10631350041	0	SMALL BUSINESS
ROGER DECKER	VE EXPRESS REPORTING IGF::CT::IGF	\$44,512.96	\$44,512.96	2015	9/30/2015	2015	SS10541140469	0	SMALL BUSINESS
OPEX CORPORATION	RENEW MAINTENANCE FOR OPEX MPS 40 MAILROOM EQUIPMENT. IGF::CT::IGF	\$44,392.50	\$44,392.50	2016	3/3/2016	SS001650072		0	SMALL BUSINESS
WILLIAM W PORTER	VE EXPRESS REPORTING IGF::CT::IGF	\$44,331.00	\$44,331.00	2015	9/30/2015	2015	SS10541140291	0	SMALL BUSINESS
HALLER, DIAN L	VE EXPRESS REPORTING IGF::CT::IGF	\$44,325.00	\$44,325.00	2015	9/30/2015	2015	SS10541140449	0	SMALL BUSINESS
STAMPLEY CONSULTING LLC	VE EXPRESS REPORTING IGF::CT::IGF	\$44,258.17	\$44,258.17	2015	9/30/2015	2015	SS10781160223	0	SMALL BUSINESS
RUBIN, LEONARD M	ME EXPRESS REPORTING - MENTAL HEALTH IGF::CT::IGF	\$44,230.00	\$44,230.00	2015	9/30/2015	2015	SS11501110056	0	SMALL BUSINESS
NYCPSYCH.COM	ME EXPRESS REPORTING - MENTAL HEALTH IGF::CT::IGF	\$44,220.00	\$44,220.00	2015	9/30/2015	2015	SS10251120126	0	SMALL BUSINESS
FREEMAN LEETH JR	VE EXPRESS REPORTING IGF::CT::IGF	\$44,194.00	\$44,194.00	2015	9/30/2015	2015	SS10881190111	0	SMALL BUSINESS
CALKINS, SUSAN D	IGF::CL::IGF OMA MEDICAL CONSULTANTS. REVIEWS BY MEDICAL CONSULTANT OF DISABILITY CLAIM CASE FILES FOR AGENCY DISABILITY PROGRAM.	\$44,150.00	\$44,150.00	2016	5/25/2016	1	SS00164C006	0	SMALL BUSINESS
JAYANT B DESAI MD	IGF::CL::IGF OMA MEDICAL CONSULTANTS. REVIEWS BY MEDICAL CONSULTANT OF DISABILITY CLAIM CASE FILES FOR AGENCY DISABILITY PROGRAM.	\$44,150.00	\$44,150.00	2016	5/25/2016	1	SS00164C059	0	SMALL BUSINESS
EBRAHIM IPAKCHI MD	IGF::CT::IGF NEW MEDICAL CONSULTANT CASE REVIEWS	\$44,150.00	\$44,150.00	2016	5/26/2016	1	SS00164C024	0	SMALL BUSINESS
KORETZKY, MARTIN B	OMA MEDICAL CONSULTANTS. REVIEWS BY MEDICAL CONSULTANT OF DISABILITY CLAIM CASE FILES FOR AGENCY DISABILITY PROGRAM. AWARDDING DR. KORETZKY INDEPENDENT CASE REVIEWS AND NON- CASE SERVICES. IGF::CL::IGF	\$44,150.00	\$44,150.00	2016	5/25/2016	1	SS00164C026	0	SMALL BUSINESS
MACY POWERS, KATHLEEN	VE EXPRESS REPORTING IGF::CT::IGF	\$44,066.00	\$44,066.00	2015	9/30/2015	2015	SS10881190095	0	SMALL BUSINESS
MAY, STEPHANIE	VE EXPRESS REPORTING IGF::CT::IGF	\$44,063.63	\$44,063.63	2015	9/30/2015	2015	SS10541140501	0	SMALL BUSINESS
BREZINSKI, ROBERT A.	ME EXPRESS REPORTING - MENTAL HEALTH IGF::CT::IGF	\$44,048.00	\$44,048.00	2015	9/30/2015	2015	SS10631150265	0	SMALL BUSINESS
LOWELL L. SPARKS, MD	ME EXPRESS REPORTING - MENTAL HEALTH IGF::CT::IGF	\$44,020.00	\$44,020.00	2015	9/30/2015	2015	SS10881190066	0	SMALL BUSINESS
RUTH ARNUSH	VE EXPRESS REPORTING IGF::CT::IGF	\$43,995.00	\$43,995.00	2015	9/30/2015	2015	SS10881190133	0	SMALL BUSINESS

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JUSINO-BERRIOS, CARLOS M	IGF::CL::IGF THE PURPOSE OF THIS MODIFICATION IS TO INCREASE CASE REVIEWS FROM 522 BY 530 AT \$82.84 PER CASE FOR A NEW TOTAL OF 1,052 CASE REVIEWS. AS A RESULT OF THIS MODIFICATION THE AWARD AMOUNT IS INCREASED FROM \$43,242.48 BY \$43,905.20 TO A NEW AWARD TOTAL OF \$87,147.68.	\$43,905.20	\$43,905.20	2016	3/22/2016	1	SS02164C012	1	SMALL BUSINESS
SPANGLER AND ASSOCIATES, LLC	VE EXPRESS REPORTING IGF::CT::IGF	\$43,895.64	\$43,895.64	2015	9/30/2015	2015	SS10541140195	0	SMALL BUSINESS
GALDIERI PHD, ANTHONY A	ME EXPRESS REPORTING - MENTAL HEALTH IGF::CT::IGF	\$43,850.00	\$43,850.00	2015	9/30/2015	2015	SS10381130038	0	SMALL BUSINESS
BUSH, PATRICIA R MD	REGION V MEDICAL CONSULTANT SERVICES FOR THE SOCIAL SECURITY ADMINISTRATION. REVIEWS BY MEDICAL CONSULTANT OF DISABILITY CLAIM CASE FILES FOR AGENCY DISABILITY PROGRAM. AWARDING DR. PATRICIA BUSH INDEPENDENT CASE REVIEWS. IGF::CL::IGF	\$43,795.20	\$43,795.20	2016	6/24/2016	2	SS05164C005	0	SMALL BUSINESS
LATCHAMSETTY, SWARAJYALAKSHMI	REGION V MEDICAL CONSULTANT SERVICES FOR THE SOCIAL SECURITY ADMINISTRATION. REVIEWS BY MEDICAL CONSULTANT OF DISABILITY CLAIM CASE FILES FOR AGENCY DISABILITY PROGRAM. IGF::CL::IGF	\$43,795.20	\$43,795.20	2016	6/30/2016	2	SS05164C016	0	SMALL BUSINESS
R S I CORP	RENEWAL OF MAINTENANCE FOR RSI CORP BUFFER POOL	\$0.00	\$43,750.00	2016	1/28/2016	SS001650019		1	OTHER THAN SMALL BUSINESS
GREENBERG MD, ABBY J	ME EXPRESS REPORTING - MENTAL HEALTH IGF::CT::IGF	\$43,730.00	\$43,730.00	2015	9/30/2015	2015	SS10251120018	0	SMALL BUSINESS
ATLANTIC VOCATIONAL SERVICES, INC	VE EXPRESS REPORTING IGF::CT::IGF	\$43,730.00	\$43,730.00	2015	9/30/2015	2015	SS10381130139	0	SMALL BUSINESS
BARBARA A DUNLAP	VE EXPRESS REPORTING IGF::CT::IGF	\$43,690.00	\$43,690.00	2015	9/30/2015	2015	SS10781160031	0	SMALL BUSINESS
HOLLY BERQUIST CONSULTING INC	VE EXPRESS REPORTING IGF::CT::IGF	\$43,659.94	\$43,659.94	2015	9/30/2015	2015	SS10691370011	0	SMALL BUSINESS
ANNETTE KAY HOLDER INC	ME EXPRESS REPORTING - MENTAL HEALTH IGF::CT::IGF	\$43,636.00	\$43,636.00	2015	9/30/2015	2015	SS10631150141	0	SMALL BUSINESS
SHEA, SUSAN	VE EXPRESS REPORTING IGF::CT::IGF	\$43,610.00	\$43,610.00	2015	9/30/2015	2015	SS10691170081	0	SMALL BUSINESS
DITRINCO, CHRISTINE	VE EXPRESS REPORTING IGF::CT::IGF	\$43,599.00	\$43,599.00	2015	9/30/2015	2015	SS10251420013	0	SMALL BUSINESS
STUBBE & ASSOCIATES INC	VE EXPRESS REPORTING IGF::CT::IGF	\$43,543.00	\$43,543.00	2015	9/30/2015	2015	SS10691170051	0	SMALL BUSINESS
SANDELL, PHYLLIS	IGF::CL::IGF CLOSELY ASSOCIATED CALL ORDER FOR 550 INDEPENDENT DISABILITY CASE REVIEWS FOR THE PERIOD 1/10/2016 - 03/31/2016. THE RATE OF PAY PER CASE IS \$79.07 FOR TOTAL FUNDING NEEDS OF \$43,488.50.	\$43,488.50	\$43,488.50	2016	1/5/2016	9	SS011140032	0	SMALL BUSINESS
ANN T NEULICHT PHD	VE EXPRESS REPORTING IGF::CT::IGF	\$43,325.00	\$43,325.00	2015	9/30/2015	2015	SS10541140153	0	SMALL BUSINESS
JUSINO-BERRIOS, CARLOS M	IGF::CL::IGF REGION 2 MEDICAL CONSULTANTS. REVIEWS BY MEDICAL CONSULTANT OF DISABILITY CLAIM CASE FILES FOR AGENCY DISABILITY PROGRAM.	\$43,242.48	\$43,242.48	2016	1/5/2016	1	SS02164C012	0	SMALL BUSINESS
HEALTH MENTAL HYGIENE MD DEPT	IGF::CL::IGF REQUESTING MISSING OR UNREPORTED DATA	\$43,200.00	\$43,200.00	2016	6/13/2016	SS001660021		0	OTHER THAN SMALL BUSINESS
HEALTH, VIRGINIA DEPARTMENT OF	IGF::CL::IGF REQUESTING MISSING OR UNREPORTED DATA	\$43,200.00	\$43,200.00	2016	6/13/2016	SS001660022		0	OTHER THAN SMALL BUSINESS
HYMOFF, IRA H	VE EXPRESS REPORTING IGF::CT::IGF	\$43,199.00	\$43,199.00	2015	9/30/2015	2015	SS11501110006	0	SMALL BUSINESS
PROFESSIONAL CONSULTING SERVICES INC	VE EXPRESS REPORTING IGF::CT::IGF	\$43,134.00	\$43,134.00	2015	9/30/2015	2015	SS11521200006	0	SMALL BUSINESS
LENORE, RONI	VE EXPRESS REPORTING IGF::CT::IGF	\$43,128.00	\$43,128.00	2015	9/30/2015	2015	SS11521100025	0	SMALL BUSINESS
ACCELLOS, INC.	ACCELLOS RADIO BEACON	\$43,121.53	\$43,121.53	2016	2/22/2016	SS001650071		0	OTHER THAN SMALL BUSINESS
CORTEZ, JENNIFER A	IGF::CL::IGF REGION 2 MEDICAL CONSULTANTS. REVIEWS BY MEDICAL CONSULTANT OF DISABILITY CLAIM CASE FILES FOR AGENCY DISABILITY PROGRAM. MODIFICATION TO INCREASE QUANTITY AND EXTEND PERFORMANCE.	\$43,050.00	\$43,050.00	2015	6/11/2015	5	SS021240005	1	SMALL BUSINESS
DPC CONSULTING LLC	IGF::CL::IGF MEDICAL CONTRACTOR SERVICES - PHYSICAL	\$43,023.00	\$43,023.00	2016	3/22/2016	4	SS041540002	0	SMALL BUSINESS
SHI INTERNATIONAL CORP.	JPDFPROCESS IS A JAVA LIBRARY TO CREATE AND MANIPULATE PDF FILES	\$43,014.43	\$43,014.43	2015	5/27/2015	SS001550150		0	OTHER THAN SMALL BUSINESS

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QUINLAN, JAMES A	OMA MEDICAL CONSULTANTS. REVIEWS BY MEDICAL CONSULTANT OF DISABILITY CLAIM CASE FILES FOR AGENCY DISABILITY PROGRAM. AWARDING DR. QUINLAN INDEPENDENT CASE REVIEWS. IGF::CL::IGF	\$43,000.00	\$43,000.00	2017	11/28/2016	1	SS00164C068	1	SMALL BUSINESS
ZANSKAS, STEPHEN A	VE EXPRESS REPORTING IGF::CT::IGF	\$42,977.00	\$42,977.00	2015	9/30/2015	2015	SS10541140323	0	SMALL BUSINESS
PAULSON, LYNN A	VE EXPRESS REPORTING IGF::CT::IGF	\$42,961.00	\$42,961.00	2015	9/30/2015	2015	SS11501210006	0	SMALL BUSINESS
GERRISH, JANE A	VE EXPRESS REPORTING IGF::CT::IGF	\$42,897.00	\$42,897.00	2015	9/30/2015	2015	SS11501110025	0	SMALL BUSINESS
HARTER, MELVIN M.	VE EXPRESS REPORTING IGF::CT::IGF	\$42,890.00	\$42,890.00	2015	9/30/2015	2015	SS10881390010	0	SMALL BUSINESS
MAXWELL, BETH A	ME EXPRESS REPORTING - MENTAL HEALTH IGF::CT::IGF	\$42,840.00	\$42,840.00	2015	9/30/2015	2015	SS10781160068	0	SMALL BUSINESS
BAKKENSON & ASSOCIATES LLC	VE EXPRESS REPORTING IGF::CT::IGF	\$42,744.00	\$42,744.00	2015	9/30/2015	2015	SS10881190079	0	SMALL BUSINESS
BOASE, LARISSA ANNETTE	VE EXPRESS REPORTING IGF::CT::IGF	\$42,680.00	\$42,680.00	2015	9/30/2015	2015	SS10631350035	0	SMALL BUSINESS
JOGLAR, FRANCISCO	ME EXPRESS REPORTING - MENTAL HEALTH IGF::CT::IGF	\$42,650.00	\$42,650.00	2015	9/30/2015	2015	SS10251320008	0	SMALL BUSINESS
ALL WORK	ME EXPRESS REPORTING - MENTAL HEALTH IGF::CT::IGF	\$42,619.00	\$42,619.00	2015	9/30/2015	2015	SS10631150173	0	SMALL BUSINESS
CORSO VOCATIONAL COUNSELING	VE EXPRESS REPORTING IGF::CT::IGF	\$42,601.00	\$42,601.00	2015	9/30/2015	2015	SS10881190217	0	SMALL BUSINESS
JOSEPH M MALANCHARUVIL, PHD PSYCHOLOGICAL CORPORATION	VE EXPRESS REPORTING IGF::CT::IGF	\$42,450.00	\$42,450.00	2015	9/30/2015	2015	SS10881190042	0	SMALL BUSINESS
KHURANA MD, HARPREET	IGF::CL::IGF REGION 2 MEDICAL CONSULTANTS. REVIEWS BY MEDICAL CONSULTANT OF DISABILITY CLAIM CASE FILES FOR AGENCY DISABILITY PROGRAM.	\$42,414.08	\$42,414.08	2016	2/29/2016	1	SS02164C014	0	SMALL BUSINESS
JPA CORPORATION	VE EXPRESS REPORTING IGF::CT::IGF	\$42,395.00	\$42,395.00	2015	9/30/2015	2015	SS11511180033	0	SMALL BUSINESS
BROWN AND ASSOCIATES	ME EXPRESS REPORTING - MENTAL HEALTH IGF::CT::IGF	\$42,386.00	\$42,386.00	2015	9/30/2015	2015	SS10631150065	0	SMALL BUSINESS
KANKAKEE URGENT CARE S.C.	REGION V MEDICAL CONSULTANT SERVICES FOR THE SOCIAL SECURITY ADMINISTRATION. REVIEWS BY MEDICAL CONSULTANT OF DISABILITY CLAIM CASE FILES FOR AGENCY DISABILITY PROGRAM. AWARDING KANKAKEE URGENT CARE S.C AND DR OLATUNJI AKINTILO M.D. INDEPENDENT CASE REVIEWS. IGF::CL::IGF	\$42,359.24	\$42,359.24	2016	6/13/2016	2	SS05154C006	0	SMALL BUSINESS
B YOUNG CONSULTING	VE EXPRESS REPORTING IGF::CT::IGF	\$42,352.00	\$42,352.00	2015	9/30/2015	2015	SS10691170037	0	SMALL BUSINESS
PACKER, BRENT	IGF::CL::IGF CLOSELY ASSOCIATED - CALL ORDER FOR I	\$42,328.00	\$42,328.00	2016	6/29/2016	3	SS07164C017	0	SMALL BUSINESS
CHARLOTTA J EWERS	VE EXPRESS REPORTING IGF::CT::IGF	\$42,310.00	\$42,310.00	2015	9/30/2015	2015	SS10631150341	0	SMALL BUSINESS
PORTER PH.D., JAMES S	VE EXPRESS REPORTING IGF::CT::IGF	\$42,286.00	\$42,286.00	2015	9/30/2015	2015	SS10541340029	0	SMALL BUSINESS
PASQUALE SANTINI MD	ME EXPRESS REPORTING - MENTAL HEALTH IGF::CT::IGF	\$42,260.00	\$42,260.00	2015	9/30/2015	2015	SS10111100039	0	SMALL BUSINESS
GAGLIANO, LISA	VE EXPRESS REPORTING IGF::CT::IGF	\$42,226.00	\$42,226.00	2015	9/30/2015	2015	SS10631250010	0	SMALL BUSINESS
HEALTH, FLORIDA DEPARTMENT OF	IGF::CL::IGF CLOSELY ASSOCIATED REQUEST EDR FUNDING FOR 2016 CONTRACT YEAR FOR FLORIDA.	\$42,199.03	\$42,199.03	2016	12/23/2015	5	SS001260020	0	OTHER THAN SMALL BUSINESS
BATTIS, SANDRA D MD	MEDICAL CONSULTANT SERVICES SANDRA BATTIS IGF::CL::IGF CLOSELY ASSOCIATED	\$42,086.52	\$42,086.52	2016	2/18/2016	1	SS09164C017	0	SMALL BUSINESS
KAREN PROVINCE	VE EXPRESS REPORTING IGF::CT::IGF	\$42,083.00	\$42,083.00	2015	9/30/2015	2015	SS10781160191	0	SMALL BUSINESS
WINSLOW MD, RICHARD S	IGF::CL::IGF WINSLOW, MC, REGION 10 ADDITION AND FUNDING OF INDEPENDENT CASE REVIEWS	\$42,000.00	\$42,000.00	2016	2/9/2016	2	SS10154C011	0	SMALL BUSINESS
REMAS GROUP, THE	VE EXPRESS REPORTING IGF::CT::IGF	\$41,942.00	\$41,942.00	2015	9/30/2015	2015	SS10881190073	0	SMALL BUSINESS
HEALTH SERVICES, WISCONSIN DEPARTMENT OF	ELECTRONIC DEATH REGISTRATION WISCONSIN THE PURPOSE OF MODIFICATION NUMBER 5 IS TO EXERCISE OPTION YEAR IV TO EXTEND THE TERM OF THE CONTRACT FROM JANUARY 1, 2016 THROUGH DECEMBER 31, 2016 FOR RECEIPT OF ELECTRONIC DEATH RECORDS.	\$0.00	\$41,886.00	2016	12/3/2015	SS001260059		5	OTHER THAN SMALL BUSINESS
MOGHBELI, HOMAYOON	OMA MEDICAL CONSULTANTS. REVIEWS BY MEDICAL CONSULTANT OF DISABILITY CLAIM CASE FILES FOR AGENCY DISABILITY PROGRAM. ADDING NON-CASE SERVICES (AND/OR CASE REVIEWS AS APPLICABLE). IGF::CL::IGF	\$41,870.00	\$41,870.00	2016	9/6/2016	1	SS00164C067	1	SMALL BUSINESS



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CANEPA, LUIS MD	ME EXPRESS REPORTING - MENTAL HEALTH IGF::CT::IGF	\$41,860.00	\$41,860.00	2015	9/30/2015	2015	SS10251120038	0	SMALL BUSINESS
FERLIC, DONALD C.	IGF::CL::IGF CLOSELY ASSOCIATED - CALL ORDER FOR I	\$41,800.00	\$41,800.00	2016	7/25/2016	3	SS08164C005	0	SMALL BUSINESS
JAMES CLAIBORN PHD	ME EXPRESS REPORTING - MENTAL HEALTH IGF::CT::IGF	\$41,790.00	\$41,790.00	2015	9/30/2015	2015	SS11501110010	0	SMALL BUSINESS
RUTH ANN LYMAN, PH.D., LLC	IGF::CL::IGF MEDICAL CONTRACTOR SERVICES - MENTAL	\$41,700.00	\$41,700.00	2016	3/23/2016	2	SS04164C031	0	SMALL BUSINESS
RUTH ANN LYMAN, PH.D., LLC	IGF::CL::IGF MODIFICATION TO ADD CASES AND EXTEND	\$41,700.00	\$41,700.00	2016	7/12/2016	2	SS04164C031	1	SMALL BUSINESS
DEREK J. O'BRIEN, M.D., P.C.	REQUEST FOR NEW CALL ORDER FOR D. O'BRIEN IGF::CL::IGF	\$41,700.00	\$41,700.00	2016	3/23/2016	1	SS04164C005	0	SMALL BUSINESS
BERKLEY & BRODZINSKY ASSOCIATES	VE EXPRESS REPORTING IGF::CT::IGF	\$41,654.00	\$41,654.00	2015	9/30/2015	2015	SS10881190065	0	SMALL BUSINESS
STEWART, THOMAS J	VE EXPRESS REPORTING IGF::CT::IGF	\$41,635.30	\$41,635.30	2015	9/30/2015	2015	SS10541140367	0	SMALL BUSINESS
	IGF::CL::IGF								
STEVEN P BOWERS	MEDICAL CONSULTANT SERVICES	\$41,607.50	\$41,607.50	2015	3/31/2015	19	SS061140039	1	SMALL BUSINESS
STERN CONSULTING, INC.	VE EXPRESS REPORTING IGF::CT::IGF	\$41,588.00	\$41,588.00	2015	9/30/2015	2015	SS10631350049	0	SMALL BUSINESS
WOOD, CHRISTOPHER K	VE EXPRESS REPORTING IGF::CT::IGF	\$41,575.00	\$41,575.00	2015	9/30/2015	2015	SS11501110087	0	SMALL BUSINESS
	IGF::OT::IGF OTHER FUNCTIONS								
YORK TELECOM CORPORATION	VARIOUS COMPONENTS OF HARDWARE AND INSTALLATION FOR A NINE-SCREEN VIDEO WALL.	\$41,541.69	\$41,541.69	2015	9/28/2015	SS001550317		0	SMALL BUSINESS
	IGF::OT::IGF OTHER FUNCTIONS								
HEALTH, FLORIDA DEPARTMENT OF	FLORIDA RECEPT OF ELECTRONIC DEATH RECORDS (EDR) FOR OPTION YEAR III PERIOD OF PERFORMANCE JANUARY 15, 2015 - JANUARY 31, 2015.	\$41,541.13	\$41,541.13	2015	12/29/2014	4	SS001260020	0	OTHER THAN SMALL BUSINESS
VAN DYK, KAREN	VE EXPRESS REPORTING IGF::CT::IGF	\$41,386.00	\$41,386.00	2015	9/30/2015	2015	SS10381130243	0	SMALL BUSINESS
DAL ENTERPRISES, LLC	VE EXPRESS REPORTING IGF::CT::IGF	\$41,281.00	\$41,281.00	2015	9/30/2015	2015	SS11521100063	0	SMALL BUSINESS
CARRIER CORPORATION	TO BUY CRITICAL SPARE PARTS FOR THE CHILLERS AT TH	\$41,277.17	\$41,277.17	2015	6/24/2015	SS001550174		0	OTHER THAN SMALL BUSINESS
SMIDT, JENNIFER	VE EXPRESS REPORTING IGF::CT::IGF	\$41,267.40	\$41,267.40	2015	9/30/2015	2015	SS10691370005	0	SMALL BUSINESS
HERMAN MILLER, INC.	SAN JUAN, PR #2271 - FIELD OFFICE EXPERIENCED A SMA	\$41,222.16	\$41,222.16	2016	9/12/2016	SS001630770		0	OTHER THAN SMALL BUSINESS
REHABILITATION MGMT SERV	VE EXPRESS REPORTING IGF::CT::IGF	\$41,115.00	\$41,115.00	2015	9/30/2015	2015	SS10781160177	0	SMALL BUSINESS
ACCELLOS, INC.	CONTINUED MAINTENANCE OF ACCELLOS RADIO BEACO	\$41,068.13	\$41,068.13	2015	3/16/2015	SS001550083		0	SMALL BUSINESS
	MEDICAL CONSULTANT SERVICES								
JERDA M RILEY MD	DR. JERDA RILEY IGF::CL::IGF	\$41,058.00	\$41,058.00	2016	3/14/2016	1	SS05164C021	0	SMALL BUSINESS
	REGION V MEDICAL CONSULTANT SERVICES FOR THE SOCIAL SECURITY ADMINISTRATION. REVIEWS BY MEDICAL CONSULTANT OF DISABILITY CLAIM CASE FILES FOR AGENCY DISABILITY PROGRAM. THIS IS TO FUND A NEW CALL ORDER FOR INDEPENDENT CASE REVIEWS AGAINST SS05-15-4C002, CALL ORDER 2, DR CASEY SHARPE								
SHARPE, CASEY	IGF::CL::IGF	\$41,058.00	\$41,058.00	2016	6/30/2016	2	SS05154C002	0	SMALL BUSINESS
	REGION V MEDICAL CONSULTANT SERVICES FOR THE SOCIAL SECURITY ADMINISTRATION. REVIEWS BY MEDICAL CONSULTANT OF DISABILITY CLAIM CASE FILES FOR AGENCY DISABILITY PROGRAM. AWARDDING DR. RICHARD ZALOUDEK INDEPENDENT CASE REVIEWS.								
ZALOUDEK, RICHARD J MD	IGF::CL::IGF	\$41,058.00	\$41,058.00	2016	6/28/2016	2	SS05164C027	0	SMALL BUSINESS
JAMES E GANOE	VE EXPRESS REPORTING IGF::CT::IGF	\$41,037.50	\$41,037.50	2015	9/30/2015	2015	SS10381130043	0	SMALL BUSINESS
	MEDICAL CONSULTANT SERVICES - PHYSICAL CASES CLOSELY ASSOCIATED TO INHERENTLY GOVERNMENTAL FUNCTION								
HARPER, JOHN T	IGF::CL::IGF	\$41,005.00	\$41,005.00	2015	1/20/2015	11	SS041140051	0	SMALL BUSINESS
	MEDICAL CONSULTANT SERVICES - PHYSICAL MED SPEECH/LANGUAGE								
MAUREEN DINGES DR	IGF::CL::IGF	\$41,005.00	\$41,005.00	2015	4/22/2015	20	SS041140057	0	SMALL BUSINESS



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DARRELL R CAUDILL M D	MEDICAL CONTRACTING SERVICES - PHYSICAL CASES CLOSELY ASSOCIATED TO INHERENTLY GOVERNMENTAL FUNCTION IGF::CL::IGF	\$41,005.00	\$41,005.00	2015	2/24/2015	11	SS041140035	1	SMALL BUSINESS
MARK GILSON, PH.D., P.C.	MEDICAL CONTRACTOR SERVICES - MENTAL CASES CLOSELY ASSOCIATED TO INHERENTLY GOVERNMENTAL FUNCTION IGF::CL::IGF	\$41,005.00	\$41,005.00	2015	2/24/2015	13	SS041140063	0	SMALL BUSINESS
KNOTT MD, HURLEY W	MEDICAL CONTRACTOR SERVICES - PHYSICAL CASES CLOSELY ASSOCIATED TO INHERENTLY GOVERNMENTAL FUNCTION IGF::CL::IGF FOR CLOSELY ASSOCIATED	\$41,005.00	\$41,005.00	2015	6/25/2015	12	SS041140028	0	SMALL BUSINESS
BITTINGER CORP.	MEDICAL CONTRACTOR SERVICES - PHYSICAL CASES CLOSELY ASSOCIATED TO INHERENTLY GOVERNMENTAL FUNCTION IGF::CL::IGF	\$41,005.00	\$41,005.00	2015	12/11/2014	19	SS041140038	0	SMALL BUSINESS
LARRY V CALDWELL MD	MEDICAL CONTRACTOR SERVICES - PHYSICAL CASES CLOSELY ASSOCIATED TO INHERENTLY GOVERNMENTAL FUNCTION IGF::CL::IGF	\$41,005.00	\$41,005.00	2015	12/11/2014	17	SS041040096	0	SMALL BUSINESS
UPCHURCH, JAMES C	MEDICAL CONTRACTOR SERVICES - PHYSICAL CASES CLOSELY ASSOCIATED TO INHERENTLY GOVERNMENTAL FUNCTION IGF::CL::IGF FOR CLOSELY ASSOCIATED	\$41,005.00	\$41,005.00	2015	6/23/2015	15	SS041140026	0	SMALL BUSINESS
GEORGE K GANAWAY, MD, PC	REGIONAL MEDICAL ADVISOR - CASE REVIEWS&CONSULTING SERVICES IGF::OT::IGF	\$41,005.00	\$41,005.00	2015	3/31/2015	10	SS041140071	1	SMALL BUSINESS
PHILIP D WALLS MD	DR. WALLS MODIFICATION TO ADD CASES SS00-11-40024  IGF::CT::IGF	\$41,000.00	\$41,000.00	2015	1/21/2015	6	SS001140024	0	SMALL BUSINESS
M L BIJPURIA MD, FACS	MEDICAL CONSULTANT SERVICES  IGF::CL::IGF	\$41,000.00	\$41,000.00	2015	1/28/2015	5	SS001140133	0	SMALL BUSINESS
WHITE, JOYCE	VE EXPRESS REPORTING IGF::CT::IGF	\$40,906.00	\$40,906.00	2015	9/30/2015	2015	SS10541140631	0	SMALL BUSINESS
GALST GERALD MD PC	ME EXPRESS REPORTING - MENTAL HEALTH IGF::CT::IGF	\$40,900.00	\$40,900.00	2015	9/30/2015	2015	SS10251120032	0	SMALL BUSINESS
DAOUD CONSULTING SERVICES	ME EXPRESS REPORTING - MENTAL HEALTH IGF::CT::IGF	\$40,888.00	\$40,888.00	2015	9/30/2015	2015	SS10631150077	0	SMALL BUSINESS
BETH DRURY INC	VE EXPRESS REPORTING IGF::CT::IGF	\$40,863.90	\$40,863.90	2015	9/30/2015	2015	SS10781160103	0	SMALL BUSINESS
MINKUS, ROXANE	VE EXPRESS REPORTING IGF::CT::IGF	\$40,821.00	\$40,821.00	2015	9/30/2015	2015	SS10881190087	0	SMALL BUSINESS
MEADOWDALE MEDICAL CONSULTING, PLLC	IGF::CL::IGF MERRILL, MC, REG 10 INDEPENDENT CASE REVIEW	\$40,800.00	\$40,800.00	2015	4/8/2015	2	SS10154C000	0	SMALL BUSINESS
NUANCE COMMUNICATIONS, INC.	NUANCE PURCHASE FOR DMA EXERCISING OPTION YEAR	\$40,800.00	\$40,800.00	2015	1/12/2015	SS001350078		2	SMALL BUSINESS
RONNIE SMITH & ASSOCIATES, L.L.C.	VE EXPRESS REPORTING IGF::CT::IGF	\$40,710.76	\$40,710.76	2015	9/30/2015	2015	SS10541140167	0	SMALL BUSINESS
DAVID E. BRAVERMAN CONSULTING, INC	IGF::CL::IGF CLOSELY ASSOCIATED - CALL ORDER FOR H	\$40,700.00	\$40,700.00	2016	7/6/2016	2	SS07164C003	0	SMALL BUSINESS
MARTIN, JUDY	IGF::CL::IGF CLOSELY ASSOCIATED - REGIONAL MEDICA	\$40,700.00	\$40,700.00	2016	3/15/2016	1	SS07164C015	0	SMALL BUSINESS
DAVID E. BRAVERMAN CONSULTING, INC	IGF::CL::IGF CLOSELY ASSOCIATED - REGIONAL MEDICA	\$40,700.00	\$40,700.00	2016	3/23/2016	1	SS07164C003	0	SMALL BUSINESS
IBAIRA, DR GUILLERMO R	IGF::CL::IGF CLOSELY ASSOCIATED KANSAS CITY REGION	\$40,700.00	\$40,700.00	2016	3/16/2016	3	SS07164C001	0	SMALL BUSINESS
JUDY L PANEK MD	IGF::CL::IGF CLOSELY ASSOCIATED - REGIONAL MEDICAL	\$40,700.00	\$40,700.00	2016	2/29/2016	1	SS07164C018	0	SMALL BUSINESS
GLENN F STERNES PHD	ME EXPRESS REPORTING - MENTAL HEALTH IGF::CT::IGF	\$40,660.00	\$40,660.00	2015	9/30/2015	2015	SS10781160080	0	SMALL BUSINESS
WILLIAM P. SILBERBERG, LLC	ME EXPRESS REPORTING - MENTAL HEALTH IGF::CT::IGF	\$40,610.00	\$40,610.00	2015	9/30/2015	2015	SS11501110032	0	SMALL BUSINESS
COBBS, WALTER	IGF::CL::IGF REGION 3 CALL ORDER FOR 500 INDEPENDE	\$40,600.00	\$40,600.00	2016	7/19/2016	4	SS03154C023	0	SMALL BUSINESS

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DANIEL J HENNESSY LLC	MEDICAL CONSULTANT SERVICES - INITIAL ORIENTATION IGF::CL::IGF	\$40,500.00	\$40,500.00	2015	6/25/2015	2	SS041440003	0	SMALL BUSINESS
HEALTH MENTAL HYGIENE MD DEPT	IGF::CL::IGF CLOSELY ASSOCIATED MD SS00-12-60061 NON-ELECTRONIC DEATH REGISTRATION DELIVERY ORDER. 46,000 NON-EDR RECORDS TOTAL DELIVERY ORDER \$40,480.00. PERIOD OF PERFORMANCE 1/01/2016 - 12/31/2016.	\$40,480.00	\$40,480.00	2016	12/22/2015	5	SS001260061	0	OTHER THAN SMALL BUSINESS
C. M. LINSENMEYER MD	VE EXPRESS REPORTING IGF::CT::IGF	\$40,420.00	\$40,420.00	2015	9/30/2015	2015	SS10691270007	0	SMALL BUSINESS
MJ VOCATIONAL SERVICES	VE EXPRESS REPORTING IGF::CT::IGF	\$40,409.00	\$40,409.00	2015	9/30/2015	2015	SS10541340051	0	SMALL BUSINESS
PORTER, DION	VE EXPRESS REPORTING IGF::CT::IGF	\$40,305.73	\$40,305.73	2015	9/30/2015	2015	SS10541140261	0	SMALL BUSINESS
JACQUELINE E CRAWFORD-APPERSON	VE EXPRESS REPORTING IGF::CT::IGF	\$40,301.00	\$40,301.00	2015	9/30/2015	2015	SS10691370007	0	SMALL BUSINESS
YARED, THOMAS A MD	IGF::CL::IGF REGION 2 MEDICAL CONSULTANTS. REVIEWS BY MEDICAL CONSULTANT OF DISABILITY CLAIM CASE FILES FOR AGENCY DISABILITY PROGRAM. MODIFICATION TO ADD CASES AND EXTEND PERFORMANCE.	\$40,210.00	\$40,210.00	2015	12/12/2014	7	SS021140109	1	SMALL BUSINESS
SELF WORK	VE EXPRESS REPORTING IGF::CT::IGF	\$40,190.00	\$40,190.00	2015	9/30/2015	2015	SS11501110007	0	SMALL BUSINESS
TIERSTEN, DAVID, M.D.	IGF::CL::IGF REGION 2 MEDICAL CONSULTANTS. REVIEWS BY MEDICAL CONSULTANT OF DISABILITY CLAIM CASE FILES FOR AGENCY DISABILITY PROGRAM.	\$40,177.40	\$40,177.40	2016	12/31/2015	1	SS02164C022	0	SMALL BUSINESS
BOLDEN, KIELA	REGION 5 MEDICAL CONSULTANTS. REVIEWS BY MEDICAL CONSULTANT OF DISABILITY CLAIM CASE FILES FOR AGENCY DISABILITY PROGRAM. MODIFICATION TO ADD CASE REVIEWS. IGF::CL::IGF	\$40,145.60	\$40,145.60	2016	9/27/2016	3	SS05154C003	1	SMALL BUSINESS
YAPONDJIAN-ALVARADO, MARIA	REGION 5 MEDICAL CONSULTANTS. REVIEWS BY MEDICAL CONSULTANT OF DISABILITY CLAIM CASE FILES FOR AGENCY DISABILITY PROGRAM. MODIFICATION TO ADD CASE REVIEWS. IGF::CL::IGF	\$40,145.60	\$40,145.60	2016	9/23/2016	2	SS05154C004	1	SMALL BUSINESS
WILLIAM WHATLEY III	ME EXPRESS REPORTING - MENTAL HEALTH IGF::CT::IGF	\$40,125.00	\$40,125.00	2015	9/30/2015	2015	SS10541140064	0	OTHER THAN SMALL BUSINESS
HERMAN MILLER, INC.	TUCSON,AZ XA908 - DESIGN, INSTALLATION AND PRODU	\$40,105.40	\$40,105.40	2015	5/14/2015	SS001530505	SS001260003	0	OTHER THAN SMALL BUSINESS
FIERMAN MD, EUGENE J	IGF::CL::IGF - SS01-16-4C0006 FIERMAN, EUEGENE- REQU	\$40,070.00	\$40,070.00	2017	10/6/2016	2	SS01164C006	0	SMALL BUSINESS
VOCATIONAL FOUNDATIONS, PLLC	VE EXPRESS REPORTING IGF::CT::IGF	\$40,069.00	\$40,069.00	2015	9/30/2015	2015	SS10881390007	0	SMALL BUSINESS
BERMAN, SAMUEL I	ME EXPRESS REPORTING - MENTAL HEALTH IGF::CT::IGF	\$40,030.00	\$40,030.00	2015	9/30/2015	2015	SS10631450006	0	SMALL BUSINESS
CHARLES TUCKER PHD	IGF::CL::IGF REGION 3 BPA CALL ORDER 0003 FOR 500 IN	\$40,009.04	\$40,009.04	2016	7/18/2016	3	SS03154C006	0	SMALL BUSINESS
PENNSYLVANIA - AMERICAN WATER COMPANY	IGF::OT::IGF PROVIDE WATER UTILITY SERVICE FOR WBD	\$40,000.00	\$40,000.00	2015	7/15/2015	SS001550211		0	OTHER THAN SMALL BUSINESS
PENNSYLVANIA - AMERICAN WATER COMPANY	IGF::OT::IGF TO PROVIDE PUBLIC WATER UTILITY SERVICE	\$40,000.00	\$40,000.00	2016	7/21/2016	SS001650192		0	OTHER THAN SMALL BUSINESS
WEISBERG, ROBERT A MD	PERIOD OF PERFORMANCE- 04/01/2016 - 07/31/2016. THE CONTRACTOR SHALL COMPLETE INDEPENDENT CASE REVIEWS IN ACCORDANCE WITH THE TERMS AND CONDITIONS SET FORTH IN THE BPA. IGF::CL::IGF	\$40,000.00	\$40,000.00	2016	3/17/2016	2	SS03154C007	0	SMALL BUSINESS
DEPARTMENT OF HEALTH OHIO	IGF::CL::IGF CLOSELY ASSOCIATED ADDING ADDITINAL FUNDS FOR ELECTRONIC DEATH REGISTRATION (EDR)FOR OHIO STATE	\$39,999.89	\$39,999.89	2015	3/13/2015	3	SS001260047	1	OTHER THAN SMALL BUSINESS
HEALTH, FLORIDA DEPARTMENT OF	IGF::OT::IGF OTHER FUNCTIONS THIS MODIFICATION ADDS FUNDING FOR 12,944 MORE ELECTRONIC DEATH RECORDS RECEIVED THAN ORIGINALLY ESTIMATED.	\$39,996.96	\$39,996.96	2016	11/19/2015	4	SS001260020	2	OTHER THAN SMALL BUSINESS
SCORZELLI, JAMES	VE EXPRESS REPORTING IGF::CT::IGF	\$39,875.00	\$39,875.00	2015	9/30/2015	2015	SS11501110091	0	SMALL BUSINESS
EASTWOOD CONSULTING, INCORPORATED	VE EXPRESS REPORTING IGF::CT::IGF	\$39,868.65	\$39,868.65	2015	9/30/2015	2015	SS10631350023	0	OTHER THAN SMALL BUSINESS

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M. S. MILLER, M.D., CONSULTANT LLC	IGF::CL::IGF OMA MEDICAL CONSULTANTS. REVIEWS BY MEDICAL CONSULTANT OF DISABILITY CLAIM CASE FILES FOR AGENCY DISABILITY PROGRAM.	\$39,850.00	\$39,850.00	2016	5/31/2016	1	SS00164C035	0	SMALL BUSINESS
BEEZY MD, REUBEN	ME EXPRESS REPORTING - MENTAL HEALTH IGF::CT::IGF	\$39,750.00	\$39,750.00	2015	9/30/2015	2015	SS10881190010	0	SMALL BUSINESS
RONALD DEVERE MD PA	ME EXPRESS REPORTING - MENTAL HEALTH IGF::CT::IGF	\$39,750.00	\$39,750.00	2015	9/30/2015	2015	SS10781160096	0	SMALL BUSINESS
RYAN CRC CDMS, JOYCE P	VE EXPRESS REPORTING IGF::CT::IGF	\$39,712.00	\$39,712.00	2015	9/30/2015	2015	SS10541140241	0	SMALL BUSINESS
KAUFMAN, LYNN	VE EXPRESS REPORTING IGF::CT::IGF	\$39,627.00	\$39,627.00	2015	9/30/2015	2015	SS10631150011	0	SMALL BUSINESS
DANMAR ASSOCIATES	VE EXPRESS REPORTING IGF::CT::IGF	\$39,585.00	\$39,585.00	2015	9/30/2015	2015	SS10381130179	0	SMALL BUSINESS
HEALTH MENTAL HYGIENE MD DEPT	IGF::OT::IGF OTHER FUNCTIONS MD RECEIPT OF NON-ELECTRONIC DEATH RECORDS FOR OPTION YEAR III PERIOD OF PERFORMANCE JANUARY 1, 2015 - DECEMBER 31, 2015.	\$39,560.00	\$39,560.00	2015	12/22/2014	4	SS001260061	0	OTHER THAN SMALL BUSINESS
SCOTT DAVID T	IGF::CL::IGF DAVID SCOTT, MC, REG. 10 ADDITION AND FUNDING OF INDEPENDENT CASE REVIEWS	\$39,360.00	\$39,360.00	2015	5/20/2015	1	SS10154C009	0	SMALL BUSINESS
COMESS, LEONARD J	IGF::CL::IGF REGIONAL MEDICAL CONSULTANT SERVICES FOR THE SOCIAL SECURITY ADMINISTRATION. REVIEWS BY MEDICAL CONSULTANT OF DISABILITY CLAIM CASE FILES FOR AGENCY DISABILITY PROGRAM. INCREASING CASE QUANTITY AND EXTEND THE PERIOD OF PERFORMANCE.	\$39,349.00	\$39,349.00	2016	6/14/2016	1	SS02164C006	2	SMALL BUSINESS
CHARLES PLOTZ MD	ME EXPRESS REPORTING - MENTAL HEALTH IGF::CT::IGF	\$39,330.00	\$39,330.00	2015	9/30/2015	2015	SS10251120008	0	SMALL BUSINESS
STATE HEALTH SERVICES, TEXAS DEPARTMENT OF CONWAY, JAMES F	IGF::CL::IGF CLOSELY ASSOCIATED TX SS00-12-60060 ELECTRONIC DEATH REGISTRATION DELIVERY ORDER. 170,000 EDR RECORDS TOTAL DELIVERY ORDER \$471,750.00. PERIOD OF PERFORMANCE 1/01/2016 - 12/31/2016.	\$39,309.85	\$39,309.85	2016	12/30/2015	5	SS001260060	0	OTHER THAN SMALL BUSINESS
SALMONS, RANDOLPH J	VE EXPRESS REPORTING IGF::CT::IGF	\$39,162.20	\$39,162.20	2015	9/30/2015	2015	SS11501310009	0	SMALL BUSINESS
LISA J. GOUDY, VOCATIONAL CONSULTANT, LLC	VE EXPRESS REPORTING IGF::CT::IGF	\$39,049.00	\$39,049.00	2015	9/30/2015	2015	SS10541140575	0	SMALL BUSINESS
BRAHMS, COHN AND LEB	VE EXPRESS REPORTING IGF::CT::IGF	\$38,974.00	\$38,974.00	2015	9/30/2015	2015	SS10541140727	0	SMALL BUSINESS
HELP/SYSTEMS, LLC	ME EXPRESS REPORTING - MENTAL HEALTH IGF::CT::IGF	\$38,940.00	\$38,940.00	2015	9/30/2015	2015	SS10631150230	0	SMALL BUSINESS
	HELPSYSTEMS BYTWARE STANDGUARD ANTIVIRUS	\$38,865.00	\$38,865.00	2015	3/9/2015	SS001550075		0	SMALL BUSINESS
HEALTH, INDIANA DEPARTMENT OF	ELECTRONIC DEATH REGISTRATION INDIANA THE PURPOSE OF MODIFICATION NUMBER 5 IS TO EXERCISE OPTION YEAR IV TO EXTEND THE TERM OF THE CONTRACT FROM JANUARY 1, 2016 THROUGH DECEMBER 31, 2016 FOR RECEIPT OF ELECTRONIC DEATH RECORDS.	\$0.00	\$38,850.00	2016	12/3/2015	SS001260035		5	OTHER THAN SMALL BUSINESS
HEALTH AND HUMAN SERVICES, MAINE DEPARTMENT OF DLT SOLUTIONS INCORPORATED	IGF::CL::IGF CLOSELY ASSOCIATED ME-SS00-12-60043 ELECTRONIC DEATH REGISTRATION (EDR) DELIVERY ORDER, 10500 EDR AT \$3.17 PER RECORD AND 3500 EDR RECORDS AT \$1.59 PER RECORD. TOTAL DELIVERY ORDER \$38,850 PERIOD OF PERFORMANCE 1/01/2016 - 12/31/2016	\$38,850.00	\$38,850.00	2016	12/22/2015	5	SS001260043	0	OTHER THAN SMALL BUSINESS
COWAN COUNSELING AND DISABILITY GROUP PC	DELL DATABASE/VIRTUALIZATION (TOAD) - MAINTENANCE	\$12,943.50	\$38,830.50	2016	5/4/2016	SS001630328	W91QUZ06A0004	0	SMALL BUSINESS
MGD MANAGEMENT INC	VE EXPRESS REPORTING IGF::CT::IGF	\$38,767.00	\$38,767.00	2015	9/30/2015	2015	SS10381130085	0	SMALL BUSINESS
MISSOURI REHABILITATION AND EMPLOYMENT GROUP	VE EXPRESS REPORTING IGF::CT::IGF	\$38,734.00	\$38,734.00	2015	9/30/2015	2015	SS11511180083	0	SMALL BUSINESS
	VE EXPRESS REPORTING IGF::CT::IGF	\$38,710.00	\$38,710.00	2015	9/30/2015	2015	SS10691270002	0	OTHER THAN SMALL BUSINESS
BARBARA A COCHRAN M.D.	IGF::CL::IGF OMA MEDICAL CONSULTANTS. REVIEWS BY MEDICAL CONSULTANT OF DISABILITY CLAIM CASE FILES FOR AGENCY DISABILITY PROGRAM. ADDING CASE REVIEWS.	\$38,700.00	\$38,700.00	2016	9/7/2016	1	SS00164C008	1	SMALL BUSINESS

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Vendor Name	Description of Requirement	Action Obligation	Base and All Options Value	Fiscal Year	Date Signed	PO/Delivery Order/Task Order/Call#	Parent Contract	Mod #	Contracting Officers Business Size Selection
BLUMENFIELD MD, HERBERT L	IGF::CL::IGF OMA MEDICAL CONSULTANTS. REVIEWS BY MEDICAL CONSULTANT OF DISABILITY CLAIM CASE FILES FOR AGENCY DISABILITY PROGRAM. ADDING CASE REVIEWS.	\$38,700.00	\$38,700.00	2016	9/19/2016	1	SS00164C056	1	SMALL BUSINESS
ZUNIGA MD, LUIS M	IGF::CL::IGF OMA MEDICAL CONSULTANTS. REVIEWS BY MEDICAL CONSULTANT OF DISABILITY CLAIM CASE FILES FOR AGENCY DISABILITY PROGRAM. ADDING CASE REVIEWS.	\$38,700.00	\$38,700.00	2016	8/19/2016	1	SS00164C054	1	SMALL BUSINESS
C TIMOTHY BESSENT	OMA MEDICAL CONSULTANTS. REVIEWS BY MEDICAL CONSULTANT OF DISABILITY CLAIM CASE FILES FOR AGENCY DISABILITY PROGRAM. ADDING CASE REVIEWS AS APPLICABLE. IGF::CL::IGF	\$38,700.00	\$38,700.00	2016	9/2/2016	1	SS00164C002	1	SMALL BUSINESS
UNGER MD, H THOMAS	OMA MEDICAL CONSULTANTS. REVIEWS BY MEDICAL CONSULTANT OF DISABILITY CLAIM CASE FILES FOR AGENCY DISABILITY PROGRAM. ADDING CASE REVIEWS. IGF::CL::IGF	\$38,700.00	\$38,700.00	2016	9/13/2016	1	SS00164C028	1	SMALL BUSINESS
SWEENEY, PATRICK	VE EXPRESS REPORTING IGF::CT::IGF	\$38,659.00	\$38,659.00	2015	9/30/2015	2015	SS10541140513	0	SMALL BUSINESS
GEERS, FRANCENE	VE EXPRESS REPORTING IGF::CT::IGF	\$38,653.51	\$38,653.51	2015	9/30/2015	2015	SS11521100057	0	SMALL BUSINESS
TRAC ASSOCIATES INC	VE EXPRESS REPORTING IGF::CT::IGF	\$38,643.00	\$38,643.00	2015	9/30/2015	2015	SS11521200004	0	SMALL BUSINESS
HEALTH, FLORIDA DEPARTMENT OF	ELECTRONIC DEATH REGISTRATION - FLORIDA THE PURPOSE OF MODIFICATION NUMBER 4 IS TO EXERCISE OPTION YEAR THREE TO EXTEND THE TERM OF THE CONTRACT FROM JANUARY 1, 2015 THROUGH DECEMBER 31, 2015 FOR RECEIPT OF ELECTRONIC DEATH RECORDS.	\$0.00	\$38,625.00	2015	12/4/2014	SS001260020		4	OTHER THAN SMALL BUSINESS
WRIGHT, TEENYSON J PHD P A	VE EXPRESS REPORTING IGF::CT::IGF	\$38,603.00	\$38,603.00	2015	9/30/2015	2015	SS10541140369	0	SMALL BUSINESS
STEBNICKI, MARK	VE EXPRESS REPORTING IGF::CT::IGF	\$38,585.00	\$38,585.00	2015	9/30/2015	2015	SS10541140715	0	SMALL BUSINESS
ALLERGY & ASTHMA ASSOCIATED	ME EXPRESS REPORTING - MENTAL HEALTH IGF::CT::IGF	\$38,560.00	\$38,560.00	2015	9/30/2015	2015	SS10781160176	0	SMALL BUSINESS
VOCATIONAL EVALUATION & REHABILITATION SERVICES, INC.	VE EXPRESS REPORTING IGF::CT::IGF	\$38,506.00	\$38,506.00	2015	9/30/2015	2015	SS10781160245	0	SMALL BUSINESS
TANZEY, WILLIAM	VE EXPRESS REPORTING IGF::CT::IGF	\$38,457.00	\$38,457.00	2015	9/30/2015	2015	SS10381130211	0	SMALL BUSINESS
ANDERT, JEFFREY N.	ME EXPRESS REPORTING - MENTAL HEALTH IGF::CT::IGF	\$38,440.00	\$38,440.00	2015	9/30/2015	2015	SS10631150020	0	SMALL BUSINESS
MICHAEL BLANKENSHIP	ME EXPRESS REPORTING - MENTAL HEALTH IGF::CT::IGF	\$38,433.00	\$38,433.00	2015	9/30/2015	2015	SS10631150199	0	SMALL BUSINESS
STATE HEALTH SERVICES, TEXAS DEPARTMENT OF	IGF::OT::IGF OTHER FUNCTIONS TX RECEIPT OF ELECTRONIC DEATH RECORDS FOR OPTION YEAR III PERIOD OF PERFORMANCE JANUARY 1, 2015 - JANUARY 31, 2015.	\$38,321.35	\$38,321.35	2015	12/29/2014	4	SS001260060	0	OTHER THAN SMALL BUSINESS
MONTIE LUMPKIN	VE EXPRESS REPORTING IGF::CT::IGF	\$38,315.00	\$38,315.00	2015	9/30/2015	2015	SS10781160289	0	SMALL BUSINESS
LA-TEX COURIERS	VE EXPRESS REPORTING IGF::CT::IGF	\$38,214.00	\$38,214.00	2015	9/30/2015	2015	SS10781160186	0	SMALL BUSINESS
MARK GILSON, PH.D., P.C.	IGF::CL::IGF MEDICAL CONSULTANT SERVICES TO REVIEW	\$38,164.50	\$38,164.50	2017	11/23/2016	3	SS04164C004	0	SMALL BUSINESS
GILMAN, MURRY J DR	IGF::CL::IGF MEDICAL CONSULTANT SERVICES TO REVIEW	\$38,164.50	\$38,164.50	2017	11/23/2016	3	SS04164C041	0	SMALL BUSINESS
VIRDEN, KATRINA	VE EXPRESS REPORTING IGF::CT::IGF	\$38,161.00	\$38,161.00	2015	9/30/2015	2015	SS10541140361	0	SMALL BUSINESS
DENNIS-DUNNE REHABILITATION	VE EXPRESS REPORTING IGF::CT::IGF	\$38,139.00	\$38,139.00	2015	9/30/2015	2015	SS11511180067	0	SMALL BUSINESS
ALKA BISHNOI MD	IGF::CL::IGF REGION 2 MEDICAL CONSULTANTS. REVIEWS BY MEDICAL CONSULTANT OF DISABILITY CLAIM CASE FILES FOR AGENCY DISABILITY PROGRAM.EXTEND PERIOD OF PERFORMANCE.	\$38,106.40	\$38,106.40	2016	6/27/2016	1	SS02164C001	2	SMALL BUSINESS
TOWERS, KARIN	IGF::CL::IGF SS01-16-4C016 TOWERS, KARIN CALL ORDER 475 INDEPENDENT DISABILITY CASE REVIEWS TO ESTABLISH THE PERIOD OF PERFORMANCE 04/01/2016 - 03/31/2017. THE RATE OF PAY IS \$80.14 PER CASE FOR TOTAL FUNDING OF \$38,066.50	\$38,066.50	\$38,066.50	2016	2/18/2016	1	SS01164C016	0	SMALL BUSINESS
TONE SOFTWARE INC	RENEWAL OF SS00-15-50134 FOR MAINTENANCE ON TO	\$38,001.00	\$38,001.00	2016	5/3/2016	SS001650116		0	SMALL BUSINESS
TERRY, KIMBERLEE R	IGF::CL::IGF CLOSELY ASSOCIATED - INCREASE INDEPEN	\$38,000.00	\$38,000.00	2016	9/2/2016	2	SS08164C025	1	SMALL BUSINESS

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YAMAMOTO MD, FRANCIS K	IGF::CL::IGF CLOSELY ASSOCIATED - INCREASE INDEPENDENT CASE REVIEWS REGIONAL MEDICAL CONTRACTOR SERVICES FOR REGION 8 SPECIALTY - ORTHOPEDIST	\$38,000.00	\$38,000.00	2016	9/6/2016		3 SS08164C026	2	SMALL BUSINESS
BERKOWITZ, MARK PSY D	IGF::CL::IGF CLOSELY ASSOCIATED - REGIONAL MEDICAL CONTRACTOR SERVICES FOR REGION 8 SPECIALTY - ORTHOPEDIST	\$38,000.00	\$38,000.00	2016	4/18/2016		2 SS08164C001	2	SMALL BUSINESS
JOHNSON, CANDICE E MD	IGF::CL::IGF CLOSELY ASSOCIATED - REGIONAL MEDICAL CONTRACTOR SERVICES FOR REGION 8 SPECIALTY - ORTHOPEDIST	\$38,000.00	\$38,000.00	2016	6/3/2016		2 SS08164C011	0	SMALL BUSINESS
BERKOWITZ, MARK PSY D	IGF::CL::IGF CLOSELY ASSOCIATED PSYCHOLOGIST NEW	\$38,000.00	\$38,000.00	2016	12/17/2015		1 SS08164C001	0	SMALL BUSINESS
YAMAMOTO MD, FRANCIS K	IGF::CL::IGF CLOSELY ASSOCIATED - INDEPENDENT CASE REVIEWS REGIONAL MEDICAL CONTRACTOR SERVICES FOR REGION 8 SPECIALTY - ORTHOPEDIST	\$38,000.00	\$38,000.00	2016	2/19/2016		1 SS08164C026	1	SMALL BUSINESS
OLIVARES, RAFAEL J	IGF::CL::IGF CLOSELY ASSOCIATED - NEW CALL ORDER INC	\$38,000.00	\$38,000.00	2016	2/23/2016		1 SS08164C018	1	SMALL BUSINESS
PROGRESSIVE REHABILITATION MANAGEMENT, INC	VE EXPRESS REPORTING IGF::CT::IGF	\$37,923.00	\$37,923.00	2015	9/30/2015		2015 SS10691170011	0	SMALL BUSINESS
MIDWEST VOCATIONAL REHABILITATION SERVICES	VE EXPRESS REPORTING IGF::CT::IGF	\$37,876.00	\$37,876.00	2015	9/30/2015		2015 SS10781560005	0	SMALL BUSINESS
HEALTH, INDIANA DEPARTMENT OF	ELECTRONIC DEATH REGISTRATION - INDIANA THE PURPOSE OF MODIFICATION NUMBER 4 IS TO EXERCISE OPTION YEAR THREE TO EXTEND THE TERM OF THE CONTRACT FROM JANUARY 1, 2015 THROUGH DECEMBER 31, 2015 FOR RECEIPT OF ELECTRONIC DEATH RECORDS.	\$0.00	\$37,870.00	2015	12/4/2014	SS001260035		4	OTHER THAN SMALL BUSINESS
MARINI,IRMO	VE EXPRESS REPORTING IGF::CT::IGF	\$37,867.00	\$37,867.00	2015	9/30/2015		2015 SS10781160037	0	SMALL BUSINESS
BEHAVIOR MANAGEMENT CONSULTANTS, A PROFESSIONAL CORPORATION	VE EXPRESS REPORTING IGF::CT::IGF	\$37,812.00	\$37,812.00	2015	9/30/2015		2015 SS10541140673	0	SMALL BUSINESS
WESTCOTT VOCATIONAL CONSULTING SERVICES, INC.	VE EXPRESS REPORTING IGF::CT::IGF	\$37,692.60	\$37,692.60	2015	9/30/2015		2015 SS10541140463	0	SMALL BUSINESS
HEALTH SERVICES, WISCONSIN DEPARTMENT OF	ELECTRONIC DEATH REGISTRATION - WISCONSIN	\$0.00	\$37,686.00	2015	12/17/2014	SS001260059		4	OTHER THAN SMALL BUSINESS
PATTERSON POPE, INC.	IGF::CT::IGF STANDARD MAINTENANCE FOR LEKTRIEVERS	\$7,420.00	\$37,668.00	2016	2/9/2016	SS041650004		0	OTHER THAN SMALL BUSINESS
FANNIN, CHRISTINE	VE EXPRESS REPORTING IGF::CT::IGF	\$37,596.00	\$37,596.00	2015	9/30/2015		2015 SS10541140409	0	SMALL BUSINESS
SOUTHERN REHABILITATION SERVICES	VE EXPRESS REPORTING IGF::CT::IGF	\$37,577.00	\$37,577.00	2015	9/30/2015		2015 SS10541140381	0	SMALL BUSINESS
MCCARRON, SUSAN CRC	VE EXPRESS REPORTING IGF::CT::IGF	\$37,574.89	\$37,574.89	2015	9/30/2015		2015 SS11501110033	0	SMALL BUSINESS
IORE PSYD, STACEY N	IGF::CL::IGF CLOSELY ASSOCIATED CALL ORDER UNDER SS01-11-40027 - FIORE, STACEY - REVIEW OF 475 INDEPENDENT DISABILITY CASES @ \$79.07 PER CASE FOR TOTAL FUNDING NEEDS OF \$37,558.25. PERIOD OF PERFORMANCE 1/1/2016 - 03/31/2016.	\$37,558.25	\$37,558.25	2016	12/29/2015		9 SS011140027	0	SMALL BUSINESS
DRA AMARILIS SERRANO	ME EXPRESS REPORTING - MENTAL HEALTH IGF::CT::IGF	\$37,540.00	\$37,540.00	2015	9/30/2015		2015 SS10251120060	0	SMALL BUSINESS
BENJAMIN CORTUO JR MD	IGF::CL::IGF REGION 2 MEDICAL CONSULTANTS. REVIEWS BY MEDICAL CONSULTANT OF DISABILITY CLAIM CASE FILES FOR AGENCY DISABILITY PROGRAM.	\$37,526.52	\$37,526.52	2016	2/3/2016		1 SS02164C008	0	SMALL BUSINESS
RICHARD P OESTREICH	ME EXPRESS REPORTING - MENTAL HEALTH IGF::CT::IGF	\$37,507.82	\$37,507.82	2015	9/30/2015		2015 SS10631150163	0	SMALL BUSINESS
CORPORATE EXECUTIVE BOARD COMPANY, THE	MEMBERSHIP RENEWAL TO CORPORATE EXECUTIVE BOARD	\$37,498.00	\$37,498.00	2015	8/20/2015	SS001550253		0	SMALL BUSINESS
MANCUSO, MARK WILLIAM	IGF::CL::IGF REGIONAL MEDICAL CONSULTANT SERVICES - REVIEWS BY MEDICAL CONSULTANT OF DISABILITY CLAIM CASE FILES FOR AGENCY DISABILITY PROGRAM.	\$37,496.12	\$37,496.12	2016	7/21/2016		2 SS03154C028	0	SMALL BUSINESS
VORHIES JR MD, JOHN R	IGF::CL::IGF VORHIES - CALL ORDER - CASES	\$37,446.75	\$37,446.75	2015	4/7/2015		12 SS061140026	0	SMALL BUSINESS
VORHIES JR MD, JOHN R	IGF::CL::IGF VORHIES - CALL ORDER - CASES	\$37,446.75	\$37,446.75	2015	6/26/2015		12 SS061140026	1	SMALL BUSINESS
KARANDE MD, MEGHANA C	IGF::CL::IGF SS01-16-4C023 KARANDE, MEGHANA CALL ORDER FOR 450 INDEPENDENT DISABILITY CASE REVIEWS AND 15 HOURS FOR THE PERIOD OF 04/01/2016 - 03/31/2017. THE RATE OF PAY PER CASE IS \$80.14, AND THE NON-CASE HOURLY RATE IS \$90.57. TOTAL FUNDING FOR THIS CALL ORDER IS \$37,421.55.	\$37,421.55	\$37,421.55	2016	2/17/2016		1 SS01164C023	0	SMALL BUSINESS
DON R. MARTH, PHD	VE EXPRESS REPORTING IGF::CT::IGF	\$37,345.00	\$37,345.00	2015	9/30/2015		2015 SS10781160291	0	SMALL BUSINESS
ZWI KAHANOWICZ MD	IGF::CL::IGF REGION 2 MEDICAL CONSULTANTS. REVIEWS BY MEDICAL CONSULTANT OF DISABILITY CLAIM CASE FILES FOR AGENCY DISABILITY PROGRAM.INCREASE CASE REVIEW QUANTITY AND EXTEND PERIOD OF PERFORMANCE.	\$37,278.00	\$37,278.00	2016	6/28/2016		1 SS02164C013	1	SMALL BUSINESS

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MILLER JULE, HOLLY	VE EXPRESS REPORTING IGF::CT::IGF	\$37,159.00	\$37,159.00	2015	9/30/2015	2015	SS10781460008	0	SMALL BUSINESS
ACCUSOFT CORPORATION	RENEWAL OF SS00-15-50159 FOR MAINTENANCE ON AC	\$37,087.78	\$37,087.78	2016	5/13/2016	SS001650132		0	SMALL BUSINESS
ELIZABETH KALB	ME EXPRESS REPORTING - MENTAL HEALTH IGF::CT::IGF	\$37,060.00	\$37,060.00	2015	9/30/2015	2015	SS10631150100	0	SMALL BUSINESS
PEDIATRIC EDUCATIONAL & DEVELOPMENTAL DIAGNOSIS SERVICES	ME EXPRESS REPORTING - MENTAL HEALTH IGF::CT::IGF	\$36,990.00	\$36,990.00	2015	9/30/2015	2015	SS10631150186	0	SMALL BUSINESS
TANZEY, TED VOCATIONAL CONSULTANT	VE EXPRESS REPORTING IGF::CT::IGF	\$36,960.00	\$36,960.00	2015	9/30/2015	2015	SS10381130155	0	SMALL BUSINESS
REHABILITATION SERVICES ASSOCIATES,LLC	VE EXPRESS REPORTING IGF::CT::IGF	\$36,911.00	\$36,911.00	2015	9/30/2015	2015	SS11501310003	0	SMALL BUSINESS
BLASE, MD MARVIN	MEDICAL CONSULTANT SERVICES - MENTAL CASES CLOSELY ASSOCIATED TO INHERENTLY GOVERNMENTAL FUNCTION IGF::CL::IGF	\$36,904.50	\$36,904.50	2015	12/16/2014	13	SS041140059	0	SMALL BUSINESS
BLUSIEWICZ, CATHY PHD	MEDICAL CONSULTANT SERVICES - MENTAL CASES CLOSELY ASSOCIATED TO INHERENTLY GOVERNMENTAL FUNCTION IGF::CL::IGF	\$36,904.50	\$36,904.50	2015	12/16/2014	8	SS041140067	0	SMALL BUSINESS
PETZELT, JOHN	MEDICAL CONSULTANT SERVICES - MENTAL CASES CLOSELY ASSOCIATED TO INHERENTLY GOVERNMENTAL FUNCTION IGF::CL::IGF	\$36,904.50	\$36,904.50	2015	12/18/2014	12	SS041140069	0	SMALL BUSINESS
TELFORD TYLER JANET	MEDICAL CONSULTANT SERVICES - MENTAL CASES CLOSELY ASSOCIATED TO INHERENTLY GOVERNMENTAL FUNCTION IGF::CL::IGF	\$36,904.50	\$36,904.50	2015	12/18/2014	11	SS041140070	0	SMALL BUSINESS
GILMAN, MURRY J DR	MEDICAL CONSULTANT SERVICES - PHYSICAL CASES CLOSELY ASSOCIATED TO INHERENTLY GOVERNMENTAL FUNCTION IGF::CL::IGF	\$36,904.50	\$36,904.50	2015	3/30/2015	14	SS041140042	1	SMALL BUSINESS
THOMAS S ROWE MD	MEDICAL CONSULTANT SERVICES - PHYSICAL CASES IGF::CL::IGF	\$36,904.50	\$36,904.50	2015	6/25/2015	18	SS041140049	0	SMALL BUSINESS
RUTH ANN LYMAN, PH.D., LLC	MEDICAL CONTRACTOR SERVICES - PYSCHOLOGY IGF::CL::IGF	\$36,904.50	\$36,904.50	2015	3/9/2015	14	SS041140024	1	SMALL BUSINESS
JAYANT B DESAI MD	MEDICAL CONSULTANT CONTRACTORS BLANKET PURCHASE AGREEMENT IGF::CT::IGF	\$36,900.00	\$36,900.00	2015	1/22/2015	5	SS001140119	0	SMALL BUSINESS
FELLING, JAMES	ME EXPRESS REPORTING - MENTAL HEALTH IGF::CT::IGF	\$36,859.50	\$36,859.50	2015	9/30/2015	2015	SS10631150094	0	SMALL BUSINESS
GUPTA, SHANKER MD	MEDICAL CONSULTANT CONTRACTORS BLANKET PURCHASE AGREEMENT IGF::CT::IGF	\$36,855.00	\$36,855.00	2015	1/21/2015	5	SS001140097	0	SMALL BUSINESS
NORTH CENTRAL REHABILITATION INC	VE EXPRESS REPORTING IGF::CT::IGF	\$36,797.00	\$36,797.00	2015	9/30/2015	2015	SS10691170009	0	SMALL BUSINESS
NEOPOST USA INC.	THE PURPOSE OF THIS CONTRACT IS TO FUND METER RE	\$7,350.24	\$36,751.20	2015	12/29/2014	SS001550057		0	OTHER THAN SMALL BUSINESS
NEUROLOGY CLINIC PC	ME EXPRESS REPORTING - MENTAL HEALTH IGF::CT::IGF	\$36,694.39	\$36,694.39	2015	9/30/2015	2015	SS10541140158	0	SMALL BUSINESS
JAMES E LANIER	VE EXPRESS REPORTING IGF::CT::IGF	\$36,593.00	\$36,593.00	2015	9/30/2015	2015	SS10631150347	0	SMALL BUSINESS
WILLIAMS, SONIA	IGF::CL::IGF MEDICAL CONSULTANT SERVICES	\$36,562.50	\$36,562.50	2015	4/9/2015	2	SS001340024	3	SMALL BUSINESS
COMPREHENSIVE REHAB SOLUTIONS LLC	VE EXPRESS REPORTING IGF::CT::IGF	\$36,518.00	\$36,518.00	2015	9/30/2015	2015	SS11501310013	0	SMALL BUSINESS
CHANG, DOUGLAS	THIS IS TO FUND A NEW CALL ORDER FOR INDEPENDENT CASE REVIEWS AGAINST SS05-16-4C006, CALL ORDER 1. DR DOUGLAS CHANG M.D. IGF::CT::IGF	\$36,496.00	\$36,496.00	2016	3/22/2016	1	SS05164C006	0	SMALL BUSINESS
ZILKA, CHERYL	VE EXPRESS REPORTING IGF::CT::IGF	\$36,430.00	\$36,430.00	2015	9/30/2015	2015	SS10631150431	0	SMALL BUSINESS
PATRICIA MC FANN	VE EXPRESS REPORTING IGF::CT::IGF	\$36,426.00	\$36,426.00	2015	9/30/2015	2015	SS10381130109	0	SMALL BUSINESS
WEBER, WILLIAM F	VE EXPRESS REPORTING IGF::CT::IGF	\$36,411.00	\$36,411.00	2015	9/30/2015	2015	SS10781160069	0	SMALL BUSINESS
GREEN, EMILY COLSON	VE EXPRESS REPORTING IGF::CT::IGF	\$36,333.10	\$36,333.10	2015	9/30/2015	2015	SS10541440035	0	SMALL BUSINESS
LES GOLDSMITH AND ASSOCIATES INC	ME EXPRESS REPORTING - MENTAL HEALTH IGF::CT::IGF	\$36,282.31	\$36,282.31	2015	9/30/2015	2015	SS10631150095	0	SMALL BUSINESS
VOCATIONAL ECONOMICS INC	VE EXPRESS REPORTING IGF::CT::IGF	\$36,271.10	\$36,271.10	2015	9/30/2015	2015	SS10541140403	0	SMALL BUSINESS
MAIMON, HENRY N.	ME EXPRESS REPORTING - MENTAL HEALTH IGF::CT::IGF	\$36,240.00	\$36,240.00	2015	9/30/2015	2015	SS10631150250	0	SMALL BUSINESS
MAATOUK & ASSOCIATES INC	VE EXPRESS REPORTING IGF::CT::IGF	\$36,206.00	\$36,206.00	2015	9/30/2015	2015	SS10781160185	0	SMALL BUSINESS

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DALTON, CHARLES B	IGF::CL::IGF REGION 2 MEDICAL CONSULTANTS. REVIEWS BY MEDICAL CONSULTANT OF DISABILITY CLAIM CASE FILES FOR AGENCY DISABILITY PROGRAM.	\$36,189.00	\$36,189.00	2015	12/15/2014	13	SS021040025	0	SMALL BUSINESS
SOLYNTJES REHABILITATION INC	VE EXPRESS REPORTING IGF::CT::IGF	\$36,123.00	\$36,123.00	2015	9/30/2015	2015	SS10631250004	0	OTHER THAN SMALL BUSINESS
MOSLEY, SPENCER	ME EXPRESS REPORTING - MENTAL HEALTH IGF::CT::IGF	\$36,092.07	\$36,092.07	2015	9/30/2015	2015	SS10631150393	0	SMALL BUSINESS
ROGER K MCNEELEY	VE EXPRESS REPORTING IGF::CT::IGF	\$36,034.80	\$36,034.80	2015	9/30/2015	2015	SS10541140467	0	SMALL BUSINESS
HEALTH, NORTH DAKOTA DEPARTMENT OF	IGF::CL::IGF REQUESTING MISSING OR UNREPORTED DE	\$36,000.00	\$36,000.00	2016	6/20/2016	SS001660023		0	OTHER THAN SMALL BUSINESS
WORKFORCE DEVELOPMENT, IOWA	SSA AND THE IOWA WORKFORCE DEVELOPMENT HAVE ENTERED INTO AGREEMENTS TO ELECTRONICALLY ACCESS STATE WAGE/UNEMPLOYMENT AND WORKERS COMP RECORDS. WE ARE REQUESTING A BASE YEAR AND FOUR ONE-YEAR OPTIONS. THIS IS A SOLE SOURCE REQUIREMENT FOR IOWA WORKFORCE DEVELOPMENT (SEE ATTACHED SSJ). IGF::OT::IGF	\$7,200.00	\$36,000.00	2016	6/17/2016	SS071650007		0	OTHER THAN SMALL BUSINESS
ISRAEL, JAMES E	VE EXPRESS REPORTING IGF::CT::IGF	\$35,833.00	\$35,833.00	2015	9/30/2015	2015	SS10691170033	0	SMALL BUSINESS
PUIG, MARIEVA	VE EXPRESS REPORTING IGF::CT::IGF	\$35,824.00	\$35,824.00	2015	9/30/2015	2015	SS10251120025	0	SMALL BUSINESS
LOZER, JAMES	ME EXPRESS REPORTING - MENTAL HEALTH IGF::CT::IGF	\$35,807.00	\$35,807.00	2015	9/30/2015	2015	SS10631150103	0	SMALL BUSINESS
KARL MANDERS	ME EXPRESS REPORTING - MENTAL HEALTH IGF::CT::IGF	\$35,750.00	\$35,750.00	2015	9/30/2015	2015	SS10631150194	0	SMALL BUSINESS
KATHRYN A ATHA	VE EXPRESS REPORTING IGF::CT::IGF	\$35,749.00	\$35,749.00	2015	9/30/2015	2015	SS10881190189	0	SMALL BUSINESS
SUE H TURNER	VE EXPRESS REPORTING IGF::CT::IGF	\$35,682.68	\$35,682.68	2015	9/30/2015	2015	SS10541140473	0	SMALL BUSINESS
WEBBER, PETER	VE EXPRESS REPORTING IGF::CT::IGF	\$35,660.00	\$35,660.00	2015	9/30/2015	2015	SS11501110052	0	SMALL BUSINESS
KATHLEEN H. ROBBINS, PH.D. PA	VE EXPRESS REPORTING IGF::CT::IGF	\$35,581.00	\$35,581.00	2015	9/30/2015	2015	SS10541140667	0	SMALL BUSINESS
M FOUNTAIN MD	IGF::CL::IGF OMA MEDICAL CONSULTANTS. REVIEWS BY MEDICAL CONSULTANT OF DISABILITY CLAIM CASE FILES FOR AGENCY DISABILITY PROGRAM.	\$35,550.00	\$35,550.00	2016	5/31/2016	1	SS00164C015	0	SMALL BUSINESS
RIAZ, SYED	OMA MEDICAL CONSULTANTS. REVIEWS BY MEDICAL CONSULTANT OF DISABILITY CLAIM CASE FILES FOR AGENCY DISABILITY PROGRAM. AWARDING DR. RIAZ INDEPENDENT CASE REVIEWS AND NON-CASE SERVICES. IGF::CL::IGF	\$35,550.00	\$35,550.00	2016	5/31/2016	1	SS00164C070	0	SMALL BUSINESS
SALOMON, NEAL	OMA MEDICAL CONSULTANTS. REVIEWS BY MEDICAL CONSULTANT OF DISABILITY CLAIM CASE FILES FOR AGENCY DISABILITY PROGRAM. IGF::CL::IGF	\$35,550.00	\$35,550.00	2016	5/25/2016	1	SS00164C040	0	SMALL BUSINESS
C RICHARD JOHNSON MD	ME EXPRESS REPORTING - MENTAL HEALTH IGF::CT::IGF	\$35,460.00	\$35,460.00	2015	9/30/2015	2015	SS11521100014	0	SMALL BUSINESS
FEDERAL PRISON INDUSTRIES INC	THIS IS A REQUEST FOR THE EXECUTIVE OFFICE FURNITURE	\$35,424.00	\$35,424.00	2016	8/1/2016	SS001650203		0	OTHER THAN SMALL BUSINESS
LAWSON VOCATIONAL SERVICES	VE EXPRESS REPORTING IGF::CT::IGF	\$35,420.00	\$35,420.00	2015	9/30/2015	2015	SS11521200008	0	OTHER THAN SMALL BUSINESS
VANDERPLATE, CALVIN	ME EXPRESS REPORTING - MENTAL HEALTH IGF::CT::IGF	\$35,410.00	\$35,410.00	2015	9/30/2015	2015	SS10541140050	0	SMALL BUSINESS
ATKINSON, JOSEPH MARTIN	VE EXPRESS REPORTING IGF::CT::IGF	\$35,321.00	\$35,321.00	2015	9/30/2015	2015	SS10251420003	0	SMALL BUSINESS
BELL, GEORGE MD	ME EXPRESS REPORTING - MENTAL HEALTH IGF::CT::IGF	\$35,200.00	\$35,200.00	2015	9/30/2015	2015	SS10381130076	0	SMALL BUSINESS
AUVENSHINE, CHARLES D	ME EXPRESS REPORTING - MENTAL HEALTH IGF::CT::IGF	\$35,170.00	\$35,170.00	2015	9/30/2015	2015	SS10541140166	0	SMALL BUSINESS
CAREER VOCATIONAL SERVICE	VE EXPRESS REPORTING IGF::CT::IGF	\$35,109.00	\$35,109.00	2015	9/30/2015	2015	SS10881190211	0	SMALL BUSINESS
HEALTH AND WELFARE, IDAHO DEPARTMENT OF	IGF::CL::IGF CLOSELY ASSOCIATED REQUEST EDR FUNDING FOR 2016 CONTRACT YEAR FOR IDAHO.	\$35,104.54	\$35,104.54	2016	12/22/2015	5	SS001260034	0	OTHER THAN SMALL BUSINESS
RIGGLE AND ASSOCIATES, L.L.C.	VE EXPRESS REPORTING IGF::CT::IGF	\$35,100.00	\$35,100.00	2015	9/30/2015	2015	SS10781160053	0	SMALL BUSINESS
RICHMOND, JOISANNE	MEDICAL CONSULTANT SERVICES - PHYSICAL CASES CLOSELY ASSOCIATED TO INHERENTLY GOVERNMENTAL FUNCTION IGF::CL::IGF	\$35,040.00	\$35,040.00	2015	12/11/2014	10	SS041140045	0	SMALL BUSINESS
COMPUTER MANAGEMENT SCIENCES INC	MAINTAIN COMPUTER MANAGEMENT SCIENCES CPXPE	\$35,000.00	\$35,000.00	2016	10/6/2015	SS001651006		0	OTHER THAN SMALL BUSINESS
CHICAGO SOFT, LTD.	OLD ORDER SS00-15-50081 RENEWAL OF CHICAGO SOFT	\$34,893.00	\$34,893.00	2015	9/8/2015	SS001550284		0	SMALL BUSINESS
SOFTMART GOVERNMENT SERVICES, INC	JREBEL IS A PLUGIN TO RATIONAL APPLICATION DEVELOPMENT	\$34,859.00	\$34,859.00	2015	7/30/2015	SS001550231		0	SMALL BUSINESS



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Vendor Name	Description of Requirement	Action Obligation	Base and All Options Value	Fiscal Year	Date Signed	PO/Delivery Order/Task Order/Call#	Parent Contract	Mod #	Contracting Officers Business Size Selection
O'BRIEN, DEREK J MD	MEDICAL CONSULTANT SERVICES - MENTAL CASES CLOSELY ASSOCIATED TO INHERENTLY GOVERNMENTAL FUNCTION IGF::CL::IGF	\$34,854.25	\$34,854.25	2015	6/23/2015	16	SS041040088	0	SMALL BUSINESS
THOMSON, THOMAS	MEDICAL CONSULTANTS CONTRACTS - PHYSICAL CASES CLOSELY ASSOCIATED TO INHERENTLY GOVERNMENTAL FUNCTION IGF::CL::IGF	\$34,854.25	\$34,854.25	2015	6/23/2015	13	SS041140027	0	SMALL BUSINESS
PERRY M WHITE	MEDICAL CONTRACTOR SERVICES - PHYSICAL CASES IGF::CL::IGF	\$34,854.25	\$34,854.25	2015	6/23/2015	13	SS041140054	0	SMALL BUSINESS
TICHAUER VOCATIONAL SOLUTIONS LLC	VE EXPRESS REPORTING IGF::CT::IGF	\$34,814.00	\$34,814.00	2015	9/30/2015	2015	SS10881190283	0	SMALL BUSINESS
SEYMOUR R BORTNER MD	IGF::CL::IGF REGION 2 MEDICAL CONSULTANTS. REVIEWS BY MEDICAL CONSULTANT OF DISABILITY CLAIM CASE FILES FOR AGENCY DISABILITY PROGRAM. INCREASE QTY. CASE REVIEWS AND EXTEND PERIOD OF PERFORMANCE.	\$34,792.80	\$34,792.80	2016	6/27/2016	1	SS02164C002	1	SMALL BUSINESS
ACCUSOFT CORPORATION	THE OFFICE OF TELECOMMUNICATIONS AND SYSTEMS O	\$34,784.82	\$34,784.82	2015	6/8/2015	SS001550159		0	SMALL BUSINESS
MARTIN, HILDA KLEIN	ME EXPRESS REPORTING - MENTAL HEALTH IGF::CT::IGF	\$34,760.00	\$34,760.00	2015	9/30/2015	2015	SS10631150162	0	SMALL BUSINESS
PENA, ROSAMARI	ME EXPRESS REPORTING - MENTAL HEALTH IGF::CT::IGF	\$34,760.00	\$34,760.00	2015	9/30/2015	2015	SS10251420006	0	SMALL BUSINESS
SOLDNER, JAMES	VE EXPRESS REPORTING IGF::CT::IGF	\$34,712.40	\$34,712.40	2015	9/30/2015	2015	SS11511180113	0	SMALL BUSINESS
OPTIONS PLUS, INC.	VE EXPRESS REPORTING IGF::CT::IGF	\$34,700.00	\$34,700.00	2015	9/30/2015	2015	SS10541140627	0	SMALL BUSINESS
HEALTH, FLORIDA DEPARTMENT OF	ELECTRONIC DEATH REGISTRATION FLORIDA THE PURPOSE OF MODIFICATION NUMBER 5 IS TO EXERCISE OPTION YEAR IV TO EXTEND THE TERM OF THE CONTRACT FROM JANUARY 1, 2016 THROUGH DECEMBER 31, 2016 FOR RECEIPT OF ELECTRONIC DEATH RECORDS.	\$0.00	\$34,687.50	2016	12/3/2015	SS001260020		5	OTHER THAN SMALL BUSINESS
DEPARTMENT OF HEALTH OHIO	IGF::CL::IGF CLOSELY ASSOCIATED OH SS00-12-60047 ELECTRONIC DEATH REGISTRATION DELIVERY ORDER. 12,500 EDR RECORDS TOTAL DELIVERY ORDER \$34,687.50. PERIOD OF PERFORMANCE 1/01/2016 - 1/31/2016.	\$34,687.50	\$34,687.50	2016	12/30/2015	5	SS001260047	0	OTHER THAN SMALL BUSINESS
SMITH, GEORGE R	ME EXPRESS REPORTING - MENTAL HEALTH IGF::CT::IGF	\$34,640.68	\$34,640.68	2015	9/30/2015	2015	SS10781160082	0	SMALL BUSINESS
SUSAN GREEN & ASSOCIATES	VE EXPRESS REPORTING IGF::CT::IGF	\$34,615.00	\$34,615.00	2015	9/30/2015	2015	SS10881190023	0	SMALL BUSINESS
CRAWFORD & COMPANY	VE EXPRESS REPORTING IGF::CT::IGF	\$34,601.00	\$34,601.00	2015	9/30/2015	2015	SS10381130145	0	OTHER THAN SMALL BUSINESS
LEE T BESEN MD	ME EXPRESS REPORTING - MENTAL HEALTH IGF::CT::IGF	\$34,530.00	\$34,530.00	2015	9/30/2015	2015	SS10381130036	0	OTHER THAN SMALL BUSINESS
WOODALL, DONALD	VE EXPRESS REPORTING IGF::CT::IGF	\$34,513.00	\$34,513.00	2015	9/30/2015	2015	SS10541140421	0	SMALL BUSINESS
GUPTA, SHANKER MD	IGF::CL::IGF OMA MEDICAL CONSULTANTS. REVIEWS BY MEDICAL CONSULTANT OF DISABILITY CLAIM CASE FILES FOR AGENCY DISABILITY PROGRAM. ADDING ADDITIONAL CASE REVIEWS AS APPLICABLE.	\$34,400.00	\$34,400.00	2016	8/29/2016	1	SS00164C022	1	SMALL BUSINESS
KULATHUNGAM, MANORANJITHAM	IGF::CL::IGF OMA MEDICAL CONSULTANTS. REVIEWS BY MEDICAL CONSULTANT OF DISABILITY CLAIM CASE FILES FOR AGENCY DISABILITY PROGRAM. ADDING CASE REVIEWS	\$34,400.00	\$34,400.00	2016	9/9/2016	1	SS00164C027	1	SMALL BUSINESS
RUIZ, JOSE TADEO P.	IGF::CL::IGF OMA MEDICAL CONSULTANTS. REVIEWS BY MEDICAL CONSULTANT OF DISABILITY CLAIM CASE FILES FOR AGENCY DISABILITY PROGRAM. TO ADD INDEPENDENT CASE REVIEWS.	\$34,400.00	\$34,400.00	2016	9/13/2016	1	SS00164C038	1	SMALL BUSINESS
KORETZKY, MARTIN B	OMA MEDICAL CONSULTANTS. REVIEWS BY MEDICAL CONSULTANT OF DISABILITY CLAIM CASE FILES FOR AGENCY DISABILITY PROGRAM. ADDING CASE REVIEWS. IGF::CL::IGF	\$34,400.00	\$34,400.00	2016	9/13/2016	1	SS00164C026	1	SMALL BUSINESS



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M FOUNTAIN MD	OMA MEDICAL CONSULTANTS. REVIEWS BY MEDICAL CONSULTANT OF DISABILITY CLAIM CASE FILES FOR AGENCY DISABILITY PROGRAM. ADDING INDEPENDENT CASE REVIEWS. IGF::CL::IGF	\$34,400.00	\$34,400.00	2016	9/7/2016	1	SS00164C015	1	SMALL BUSINESS
CNP CONSULTANTS	ME EXPRESS REPORTING - MENTAL HEALTH IGF::CT::IGF	\$34,380.00	\$34,380.00	2015	9/30/2015	2015	SS10781160040	0	SMALL BUSINESS
MCDANIEL & ASSOCIATES	VE EXPRESS REPORTING IGF::CT::IGF	\$34,378.44	\$34,378.44	2015	9/30/2015	2015	SS10541140439	0	SMALL BUSINESS
FEDER, CAPLAN HEIDI	VE EXPRESS REPORTING IGF::CT::IGF	\$34,306.00	\$34,306.00	2015	9/30/2015	2015	SS10541440031	0	SMALL BUSINESS
KUHN KONSULTING	VE EXPRESS REPORTING IGF::CT::IGF	\$34,274.00	\$34,274.00	2015	9/30/2015	2015	SS10691170041	0	SMALL BUSINESS
HEALTH AND WELFARE, IDAHO DEPARTMENT OF	IGF::OT::IGF OTHER FUNCTIONS IDAHO'S PROVISION OF ELECTRONIC DEATH RECORDS (EDR) FOR OPTION YEAR III PERIOD OF PERFORMANCE JANUARY 1, 2015 - DECEMBER 31, 2015	\$34,219.02	\$34,219.02	2015	12/22/2014	4	SS001260034	0	OTHER THAN SMALL BUSINESS
JOSE J RABELO MD	IGF::CL::IGF REGION 2 MEDICAL CONSULTANTS. REVIEWS BY MEDICAL CONSULTANT OF DISABILITY CLAIM CASE FILES FOR AGENCY DISABILITY PROGRAM.	\$34,212.92	\$34,212.92	2016	2/9/2016	1	SS02164C019	0	SMALL BUSINESS
STAHR AND ASSOCIATES, INCORPORATED	VE EXPRESS REPORTING IGF::CT::IGF	\$34,210.00	\$34,210.00	2015	9/30/2015	2015	SS10691170031	0	SMALL BUSINESS
HERMAN MILLER, INC.	BLUEFIELD WV #G311 DESIGN, INSTALLATION SERVICES	\$34,207.05	\$34,207.05	2015	7/16/2015	SS001530737	SS001260003	0	OTHER THAN SMALL BUSINESS
HOPKINS, THERESA	VE EXPRESS REPORTING IGF::CT::IGF	\$34,203.00	\$34,203.00	2015	9/30/2015	2015	SS10251420005	0	SMALL BUSINESS
HOWARD T HORSLEY JR MD PC	IGF::CL::IGF CLOSELY ASSOCIATED INDEPENDENT CASE	\$34,200.00	\$34,200.00	2016	2/19/2016	1	SS08164C009	1	SMALL BUSINESS
RENNER, LISA	IGF::CL::IGF CLOSELY ASSOCIATED - REGIONAL MEDICAL	\$34,200.00	\$34,200.00	2016	4/25/2016	1	SS08164C019	2	SMALL BUSINESS
MARCIA FOSTER	IGF::CL::IGF CLOSELY ASSOCIATED - CALL ORDER FOR II	\$34,188.00	\$34,188.00	2016	7/15/2016	3	SS07164C005	0	SMALL BUSINESS
CHRISTOS S DAGADAKIS MD	IGF::CT::IGF TO FUND INDEPENDENT CASE REVIEWS AG	\$34,176.00	\$34,176.00	2015	3/20/2015	1	SS10154C003	0	SMALL BUSINESS
UPTON, THOMAS	ME EXPRESS REPORTING - MENTAL HEALTH IGF::CT::IGF	\$34,174.00	\$34,174.00	2015	9/30/2015	2015	SS10631150193	0	SMALL BUSINESS
COMPLETE CAREER SERVICES INC	ME EXPRESS REPORTING - MENTAL HEALTH IGF::CT::IGF	\$34,021.00	\$34,021.00	2015	9/30/2015	2015	SS10631150303	0	SMALL BUSINESS
JOHN DAVID SABOW, MD	VE EXPRESS REPORTING IGF::CT::IGF	\$33,890.00	\$33,890.00	2015	9/30/2015	2015	SS11511180046	0	SMALL BUSINESS
WESTWIND CONSULTING INC	VE EXPRESS REPORTING IGF::CT::IGF	\$33,794.00	\$33,794.00	2015	9/30/2015	2015	SS10541140181	0	OTHER THAN SMALL BUSINESS
REHABILITATION RESOURCES INC	VE EXPRESS REPORTING IGF::CT::IGF	\$33,781.00	\$33,781.00	2015	9/30/2015	2015	SS10781160323	0	OTHER THAN SMALL BUSINESS
DEPARTMENT OF HEALTH OHIO	IGF::OT::IGF OTHER FUNCTIONS OH RECEIPT OF ELECTRONIC DEATH RECORDS FOR OPTION YEAR III PERIOD OF PERFORMANCE JANUARY 1, 2015 - DECEMBER 31, 2015.	\$33,682.72	\$33,682.72	2015	12/29/2014	4	SS001260047	0	OTHER THAN SMALL BUSINESS
CONSULTING PSYCHOLOGISTS OF CENTRAL LOUISIANA INC	ME EXPRESS REPORTING - MENTAL HEALTH IGF::CT::IGF	\$33,649.60	\$33,649.60	2015	9/30/2015	2015	SS10781160138	0	SMALL BUSINESS
HERMAN MILLER, INC.	HARTFORD (ODAR), CT #AX68 DESIGN, PRODUCT AND IN	\$33,594.65	\$33,594.65	2015	8/6/2015	SS001530825	SS001260003	0	OTHER THAN SMALL BUSINESS
WHEELER, ELIZABETH	ME EXPRESS REPORTING - MENTAL HEALTH IGF::CT::IGF	\$33,556.40	\$33,556.40	2015	9/30/2015	2015	SS10781360007	0	SMALL BUSINESS
RICHARD HUTSON MD	ME EXPRESS REPORTING - MENTAL HEALTH IGF::CT::IGF	\$33,470.00	\$33,470.00	2015	9/30/2015	2015	SS10631150006	0	SMALL BUSINESS
CLONINGER, KENNETH L	ME EXPRESS REPORTING - MENTAL HEALTH IGF::CT::IGF	\$33,430.00	\$33,430.00	2015	9/30/2015	2015	SS10541140128	0	SMALL BUSINESS
JERRY M ROWZEE	VE EXPRESS REPORTING IGF::CT::IGF	\$33,387.00	\$33,387.00	2015	9/30/2015	2015	SS10541140175	0	SMALL BUSINESS
FRAIN REHABILITATION SERVICES	VE EXPRESS REPORTING IGF::CT::IGF	\$33,367.95	\$33,367.95	2015	9/30/2015	2015	SS10541140705	0	SMALL BUSINESS
BUDA, FRANCIS B MD	IGF::CL::IGF MEDICAL CONSULTANT SERVICES TO REVIEW	\$33,360.00	\$33,360.00	2016	8/31/2016	4	SS04164C034	0	SMALL BUSINESS
PIGUE, V DAVID & ASSOC INC	VE EXPRESS REPORTING IGF::CT::IGF	\$33,333.00	\$33,333.00	2015	9/30/2015	2015	SS10541140359	0	SMALL BUSINESS
DEBORAH A LEE	ME EXPRESS REPORTING - MENTAL HEALTH IGF::CT::IGF	\$33,329.00	\$33,329.00	2015	9/30/2015	2015	SS10631150153	0	SMALL BUSINESS
TONI MARTIN MD	IGF::CL::IGF BLANKET PURCHASE AGREEMENTS FOR CONTRACTORS TO PROVIDE REGIONAL MEDICAL CONSULTANT SERVICES FOR THE SOCIAL SECURITY ADMINISTRATION. REVIEWS BY MEDICAL CONSULTANT OF DISABILITY CLAIM CASE FILES FOR AGENCY DISABILITY PROGRAM. MODIFICATION TO ADD CASES, ADD NON-CASE SERVICE HOURS AND EXTEND THE PERIOD OF PERFORMANCE.	\$33,319.80	\$33,319.80	2016	7/31/2016	1	SS09164C014	1	SMALL BUSINESS
STATE HEALTH SERVICES, TEXAS DEPARTMENT OF	ELECTRONIC DEATH REGISTRATION TEXAS THE PURPOSE OF MODIFICATION NUMBER 5 IS TO EXERCISE OPTION YEAR IV TO EXTEND THE TERM OF THE CONTRACT FROM JANUARY 1, 2016 THROUGH DECEMBER 31, 2016 FOR RECEIPT OF ELECTRONIC DEATH RECORDS.	\$0.00	\$33,300.00	2016	12/30/2015	SS001260060		5	OTHER THAN SMALL BUSINESS

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HEALTH, NORTH DAKOTA DEPARTMENT OF	IGF::CL::IGF CLOSELY ASSOCIATED REQUEST EDR FUND	\$33,300.00	\$33,300.00	2016	12/22/2015		5 SS001260046	0	OTHER THAN SMALL BUSINESS
SECRETARY STATE, NEW HAMPSHIRE DEPT OF	IGF::CL::IGF CLOSELY ASSOCIATED NH SS00-12-60030 ELECTRONIC DEATH REGISTRATION DELIVERY ORDER. 12,000 EDR RECORDS TOTAL DELIVERY ORDER \$33,300.00. PERIOD OF PERFORMANCE 1/01/2016 - 12/31/2016.	\$33,300.00	\$33,300.00	2016	12/22/2015		5 SS001260030	0	OTHER THAN SMALL BUSINESS
HEALTH, VERMONT DEPARTMENT OF	IGF::CL::IGF CLOSELY ASSOCIATED REQUEST EDR FUNDING FOR 2016 CONTRACT YEAR FOR VERMONT.	\$33,300.00	\$33,300.00	2016	12/22/2015		5 SS001260058	0	OTHER THAN SMALL BUSINESS
BROOKS,DURADO	ME EXPRESS REPORTING - MENTAL HEALTH IGF::CT::IGF	\$33,220.00	\$33,220.00	2015	9/30/2015		2015 SS10781160066	0	SMALL BUSINESS
POLLACK, MARGARET PHD	IGF::CL::IGF MODIFICATION TO ADD CASES AND EXTEND	\$33,088.50	\$33,088.50	2016	7/29/2016		1 SS09164C050	1	SMALL BUSINESS
IRON DATA SOLUTIONS, INC. (DE)	IGF::OT::IGF IDIQ CONTRACT SS00-11-60059(IRON DATA SOLUTIONS, INC.)--TASK ORDER 0072: IRON DATA RETURNED CLAIMS WITH MODIFIED DETERMINATION PROJECT, ST. LOUIS DISABILITY PROCESSING UNITS SAMPLING PROJECT.	\$33,046.00	\$33,046.00	2015	2/12/2015		72 SS001160059	0	OTHER THAN SMALL BUSINESS
JOHN WILSON CONSULTING	VE EXPRESS REPORTING IGF::CT::IGF	\$32,965.25	\$32,965.25	2015	9/30/2015		2015 SS10541240009	0	SMALL BUSINESS
HERMAN MILLER, INC.	GLEN BURNIE, MD DO X283 REQUIRES FIVE (5) ADDITION	\$32,959.70	\$32,959.70	2016	5/2/2016	SS001630352	SS001260003	0	OTHER THAN SMALL BUSINESS
LAZARUS, SUSAN	VE EXPRESS REPORTING IGF::CT::IGF	\$32,953.00	\$32,953.00	2015	9/30/2015		2015 SS10541140351	0	SMALL BUSINESS
PARKER, JA INC	ME EXPRESS REPORTING - MENTAL HEALTH IGF::CT::IGF	\$32,911.20	\$32,911.20	2015	9/30/2015		2015 SS10631150302	0	SMALL BUSINESS
DEMETRI W DRES	REGION V MEDICAL CONSULTANT SERVICES FOR THE SOCIAL SECURITY ADMINISTRATION. REVIEWS BY MEDICAL CONSULTANT OF DISABILITY CLAIM CASE FILES FOR AGENCY DISABILITY PROGRAM. AWARDING DR. DEMETRI DRES INDEPENDENT CASE REVIEWS. IGF::CL::IGF	\$32,846.40	\$32,846.40	2016	6/30/2016		2 SS05164C010	0	SMALL BUSINESS
HOY-WATKINS, MICHELLE	REGION V MEDICAL CONSULTANT SERVICES FOR THE SOCIAL SECURITY ADMINISTRATION. REVIEWS BY MEDICAL CONSULTANT OF DISABILITY CLAIM CASE FILES FOR AGENCY DISABILITY PROGRAM. AWARDING DR. MICHELLE HOY-WATKINS INDEPENDENT CASE REVIEWS. IGF::CL::IGF	\$32,846.40	\$32,846.40	2016	6/30/2016		2 SS05164C014	0	SMALL BUSINESS
MCBROOM WEISS, MICHELLE	VE EXPRESS REPORTING IGF::CT::IGF	\$32,845.00	\$32,845.00	2015	9/30/2015		2015 SS10541140591	0	SMALL BUSINESS
RABIN PH.D, MICHAEL	ME EXPRESS REPORTING - MENTAL HEALTH IGF::CT::IGF	\$32,840.00	\$32,840.00	2015	9/30/2015		2015 SS10631150244	0	SMALL BUSINESS
SCHWARTZ, MINA A	VE EXPRESS REPORTING IGF::CT::IGF	\$32,808.00	\$32,808.00	2015	9/30/2015		2015 SS10381130121	0	SMALL BUSINESS
GAIR, CELINE PAYNE PHD	MEDICAL CONTRACTOR SERVICES - MENTAL CASES CLOSELY ASSOCIATED TO INHERENTLY GOVERNMENTAL FUNCTION IGF::CL::IGF	\$32,804.00	\$32,804.00	2015	5/4/2015		15 SS041040091	3	SMALL BUSINESS
MARYANNE BONGIOVANI PHD	IGF::CL::IGF	\$32,800.00	\$32,800.00	2015	1/28/2015		6 SS001140131	0	SMALL BUSINESS
SCOVERN, HENRY	IGF::CL::IGF THE PURPOSE OF THIS MODIFICATION IS TO	\$32,740.20	\$32,740.20	2016	9/26/2016		4 SS03154C008	1	SMALL BUSINESS
THOMAS, ALICE	VE EXPRESS REPORTING IGF::CT::IGF	\$32,739.00	\$32,739.00	2015	9/30/2015		2015 SS10881190081	0	SMALL BUSINESS
TRUDEAU, SANDRA	VE EXPRESS REPORTING IGF::CT::IGF	\$32,650.00	\$32,650.00	2015	9/30/2015		2015 SS11511180021	0	SMALL BUSINESS
GARY FRANKLIN SPITZ	IGF::CL::IGF  REGION 2 MEDICAL CONSULTANTS. REVIEWS BY MEDICAL CONSULTANT OF DISABILITY CLAIM CASE FILES FOR AGENCY DISABILITY PROGRAM. MODIFICATION TO INCREASE QUANTITY.	\$32,648.00	\$32,648.00	2015	9/21/2015		13 SS021140106	1	SMALL BUSINESS

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MARY McLARNON MD	THIS IS A MODIFICATION TO ADD INDEPENDENT CASE REVIEWS TO THE EXISTING CALL ORDER #0011. DUE TO ADDITIONAL WORKLOAD, IT IS NECESSARY TO INCREASE EXISTING CALL ORDER FOR THIS RMC. THE REGION II RMC EVALUATES MEDICAL EVIDENCE FOR TITLE II AND TITLE XVI DISABILITY CLAIMS. REVIEWS. IGF::CL::IGF	\$32,648.00	\$32,648.00	2015	9/21/2015	11	SS021140095	2	SMALL BUSINESS
JOHN D BLAKEMAN	VE EXPRESS REPORTING IGF::CT::IGF	\$32,648.00	\$32,648.00	2015	9/30/2015	2015	SS10541140567	0	SMALL BUSINESS
CAMPION MD, ROBERT	IGF::CL::IGF REGION 2 MEDICAL CONSULTANTS. REVIEWS BY MEDICAL CONSULTANT OF DISABILITY CLAIM CASE FILES FOR AGENCY DISABILITY PROGRAM.	\$32,638.96	\$32,638.96	2016	2/10/2016	1	SS02164C003	0	SMALL BUSINESS
IBAIRA, DR GUILLERMO R	IGF::CL::IGF CLOSELY ASSOCIATED - CALL ORDER FOR E	\$32,560.00	\$32,560.00	2016	8/19/2016	5	SS07164C001	0	SMALL BUSINESS
KRESSER, PAULA PH.D.	IGF::CL::IGF CLOSELY ASSOCIATED - CALL ORDER FOR H	\$32,560.00	\$32,560.00	2016	7/15/2016	2	SS07164C010	0	SMALL BUSINESS
ROSENSHIELD, PHILIP	IGF::CL::IGF CLOSELY ASSOCIATED - REGIONAL MEDICA	\$32,560.00	\$32,560.00	2016	4/15/2016	1	SS07164C021	0	SMALL BUSINESS
IBAIRA, DR GUILLERMO R	IGF::CL::IGF CLOSELY ASSOCIATED - REGIONAL MEDICA	\$32,560.00	\$32,560.00	2016	2/29/2016	2	SS07164C001	0	SMALL BUSINESS
KRESSER, PAULA PH.D.	IGF::CL::IGF CLOSELY ASSOCIATED - REGIONAL MEDICA	\$32,560.00	\$32,560.00	2016	2/29/2016	1	SS07164C010	0	SMALL BUSINESS
ROBERT HUGHES MD	IGF::CL::IGF CLOSELY ASSOCIATED - REGIONAL MEDICA	\$32,560.00	\$32,560.00	2016	4/19/2016	1	SS07164C008	0	SMALL BUSINESS
DONOVAN, KEVIN PHD	IGF::CL::IGF CLOSELY ASSOCIATED - REGIONAL MEDICAL	\$32,560.00	\$32,560.00	2016	2/29/2016	1	SS07164C004	0	SMALL BUSINESS
ARTHUR L LEWY	IGF::CL::IGF REGIONAL MEDICAL CONSULTANT SERVICES FOR THE SOCIAL SECURITY ADMINISTRATION. REVIEWS BY MEDICAL CONSULTANT OF DISABILITY CLAIM CASE FILES FOR AGENCY DISABILITY PROGRAM.	\$32,557.00	\$32,557.00	2016	5/17/2016	3	SS10154C007	0	SMALL BUSINESS
STATE HEALTH SERVICES, TEXAS DEPARTMENT OF	ELECTRONIC DEATH REGISTRATION - TEXAS	\$0.00	\$32,460.00	2015	12/11/2014	SS001260060		4	OTHER THAN SMALL BUSINESS
HEALTH, NORTH DAKOTA DEPARTMENT OF	IGF::OT::IGF OTHER FUNCTIONS DELIVERY ORDER FOR RECEIPT OF 12,000 ELECTRONIC DEATH RECORDS.	\$32,460.00	\$32,460.00	2015	12/30/2014	4	SS001260046	0	OTHER THAN SMALL BUSINESS
SECRETARY STATE, NEW HAMPSHIRE DEPT OF	IGF::OT::IGF OTHER FUNCTIONS NH RECEIPT OF ELECTRONIC DEATH RECORDS FOR OPTION YEAR III PERIOD OF PERFORMANCE JANUARY 1, 2015 - DECEMBER 31, 2015.	\$32,460.00	\$32,460.00	2015	12/22/2014	4	SS001260030	0	OTHER THAN SMALL BUSINESS
HEALTH, VERMONT DEPARTMENT OF	IGF::OT::IGF OTHER FUNCTIONS VT RECEIPT OF ELECTRONIC DEATH RECORDS FOR OPTION YEAR III PERIOD OF PERFORMANCE JANUARY 1, 2015 - DECEMBER 31, 2015.	\$32,460.00	\$32,460.00	2015	12/22/2014	4	SS001260058	0	OTHER THAN SMALL BUSINESS
BARBARA BURK VOCATIONAL EXPERTS	ME EXPRESS REPORTING - MENTAL HEALTH IGF::CT::IGF	\$32,454.00	\$32,454.00	2015	9/30/2015	2015	SS10631150247	0	SMALL BUSINESS
PATRICIA EHLINGER	VE EXPRESS REPORTING IGF::CT::IGF	\$32,453.00	\$32,453.00	2015	9/30/2015	2015	SS10781160059	0	SMALL BUSINESS
SCHNEIDER, KAREN LEIGH	VE EXPRESS REPORTING IGF::CT::IGF	\$32,342.00	\$32,342.00	2015	9/30/2015	2015	SS10631350017	0	SMALL BUSINESS
BRENNER, ANNE MANON MD	IGF::CL::IGF CLOSELY ASSOCIATED EXAMINATION AND A	\$32,300.00	\$32,300.00	2016	2/19/2016	2	SS08164C002	1	SMALL BUSINESS
CONROE, HENRY DR MD SC	REGION V MEDICAL CONSULTANT SERVICES FOR THE SOCIAL SECURITY ADMINISTRATION. REVIEWS BY MEDICAL CONSULTANT OF DISABILITY CLAIM CASE FILES FOR AGENCY DISABILITY PROGRAM. AWARDING DR. HENRY CONROE INDEPENDENT CASE REVIEWS. IGF::CL::IGF	\$32,230.80	\$32,230.80	2016	6/28/2016	2	SS05164C029	0	SMALL BUSINESS
SIMONDS, DR JOHN MD	VE EXPRESS REPORTING IGF::CT::IGF	\$32,180.00	\$32,180.00	2015	9/30/2015	2015	SS10781160018	0	SMALL BUSINESS
ALKA BISHNOI MD	IGF::CL::IGF REGION 2 MEDICAL CONSULTANTS. REVIEWS BY MEDICAL CONSULTANT OF DISABILITY CLAIM CASE FILES FOR AGENCY DISABILITY PROGRAM. MODIFICATION TO ADD CASES AND EXTEND PERFORMANCE.	\$32,168.00	\$32,168.00	2015	3/2/2015	7	SS021140001	1	SMALL BUSINESS

Sole Source Contracts  
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Vendor Name	Description of Requirement	Action Obligation	Base and All Options Value	Fiscal Year	Date Signed	PO/Delivery Order/Task Order/Call#	Parent Contract	Mod #	Contracting Officers Business Size Selection
XANTHOPOULOS, LARY	IGF::CL::IGF SS01-15-4C001 XANTHOPOULOS, LARRY CALL ORDER FOR 400 INDEPENDENT DISABILITY CASE REVIEWS FOR THE PERIOD OF PERFORMANCE 04/01/2016 - 03/31/2017. THE RATE OF PAY IS \$80.41 PER CASE FOR TOTAL FUNDING OF \$32,164.	\$32,164.00	\$32,164.00	2016	2/17/2016	3	SS01154C001	0	SMALL BUSINESS
BENNETT, CAROL	VE EXPRESS REPORTING IGF::CT::IGF	\$32,119.75	\$32,119.75	2015	9/30/2015	2015	SS10781160121	0	SMALL BUSINESS
CAREER DEVELOPMENT ASSOCIATES LLC	VE EXPRESS REPORTING IGF::CT::IGF	\$32,077.00	\$32,077.00	2015	9/30/2015	2015	SS10381130193	0	SMALL BUSINESS
HAYES, SUSAN E	VE EXPRESS REPORTING IGF::CT::IGF	\$32,066.00	\$32,066.00	2015	9/30/2015	2015	SS10781360043	0	SMALL BUSINESS
INNOVATION DATA PROCESSING, INC.	THE PURCHASE OF ADDITIONAL MSU'S TO SUPPORT THE	\$32,006.40	\$32,006.40	2015	8/25/2015	SS001550008		6	OTHER THAN SMALL BUSINESS
NETEC INTERNATIONAL INC	CUSTOMER INFORMATION CONTROL SYSTEM (CICS) FILE	\$32,000.00	\$32,000.00	2015	7/30/2015	SS001550239		0	SMALL BUSINESS
HEYWARD X. JOHNSON, LLC	VE EXPRESS REPORTING IGF::CT::IGF	\$31,987.00	\$31,987.00	2015	9/30/2015	2015	SS10781460004	0	SMALL BUSINESS
KNOTT MD, HURLEY W	MEDICAL CONTRACTOR SERVICES - PHYSICAL CASES CLOSELY ASSOCIATED TO INHERENTLY GOVERNMENTAL FUNCTION IGF::CL::IGF FOR CLOSELY ASSOCIATED	\$31,983.90	\$31,983.90	2015	12/15/2014	11	SS041140028	0	SMALL BUSINESS
RUTH B RONDBERG	VE EXPRESS REPORTING IGF::CT::IGF	\$31,940.00	\$31,940.00	2015	9/30/2015	2015	SS10381130119	0	SMALL BUSINESS
JEFF MALMUTH & CO INC	VE EXPRESS REPORTING IGF::CT::IGF	\$31,908.00	\$31,908.00	2015	9/30/2015	2015	SS10881190155	0	SMALL BUSINESS
WILLIAM BACKLUND MD	NEW CALL ORDER TO ADD CASES FOR DR. BACKLUND IGF	\$31,875.00	\$31,875.00	2017	10/25/2016	4	SS10154C004	0	SMALL BUSINESS
PUIG, MARIEVA	ME EXPRESS REPORTING - MENTAL HEALTH IGF::CT::IGF	\$31,780.00	\$31,780.00	2015	9/30/2015	2015	SS10251120054	0	SMALL BUSINESS
BRIARWOOD ASSOCIATES	VE EXPRESS REPORTING IGF::CT::IGF	\$31,764.00	\$31,764.00	2015	9/30/2015	2015	SS10381130067	0	SMALL BUSINESS
MEUNIER, THOMAS JR,	VE EXPRESS REPORTING IGF::CT::IGF	\$31,666.00	\$31,666.00	2015	9/30/2015	2015	SS10781160297	0	SMALL BUSINESS
NAOMI M KELLY	IGF::CL::IGF CLOSELY ASSOCIATED - RMC - CASE REVIEW	\$31,628.00	\$31,628.00	2015	8/17/2015	9	SS011140028	2	SMALL BUSINESS
GALLOWAY, RICHARD H	VE EXPRESS REPORTING IGF::CT::IGF	\$31,620.61	\$31,620.61	2015	9/30/2015	2015	SS10781160195	0	SMALL BUSINESS
ROGERS, JACKIE B	VE EXPRESS REPORTING IGF::CT::IGF	\$31,618.00	\$31,618.00	2015	9/30/2015	2015	SS10541140611	0	SMALL BUSINESS
FINE,LESLIE DR	ME EXPRESS REPORTING - MENTAL HEALTH IGF::CT::IGF	\$31,580.00	\$31,580.00	2015	9/30/2015	2015	SS10251120016	0	SMALL BUSINESS
RUHNKE, JENNIFER	VE EXPRESS REPORTING IGF::CT::IGF	\$31,572.00	\$31,572.00	2015	9/30/2015	2015	SS10691170075	0	SMALL BUSINESS
KIDDER, WAYNE R	VE EXPRESS REPORTING IGF::CT::IGF	\$31,530.00	\$31,530.00	2015	9/30/2015	2015	SS10881490005	0	SMALL BUSINESS
GOODMAN, JOSEPH L	VE EXPRESS REPORTING IGF::CT::IGF	\$31,517.00	\$31,517.00	2015	9/30/2015	2015	SS11501110061	0	SMALL BUSINESS
K I SERVICE INC	VE EXPRESS REPORTING IGF::CT::IGF	\$31,429.00	\$31,429.00	2015	9/30/2015	2015	SS10781160153	0	SMALL BUSINESS
PAZ, ANNETTE DE	IGF::CL::IGF REGION 2 MEDICAL CONSULTANTS. REVIEWS BY MEDICAL CONSULTANT OF DISABILITY CLAIM CASE FILES FOR AGENCY DISABILITY PROGRAM EXTEND PERIOD OF PERFORMANCE.	\$31,164.00	\$31,164.00	2016	6/28/2016	3	SS021440024	2	SMALL BUSINESS
REHABILITATION CONCEPTS	VE EXPRESS REPORTING IGF::CT::IGF	\$31,155.00	\$31,155.00	2015	9/30/2015	2015	SS11511180061	0	SMALL BUSINESS
TONE SOFTWARE INC	MAINTENANCE ON DYNA-STEP CPU LICENSE FOR 12 MO	\$31,089.00	\$31,089.00	2015	5/19/2015	SS001550134		0	OTHER THAN SMALL BUSINESS
COTTLE, ROBERT	VE EXPRESS REPORTING IGF::CT::IGF	\$31,059.00	\$31,059.00	2015	9/30/2015	2015	SS10881390015	0	SMALL BUSINESS
DAVID L RUSSELL	ME EXPRESS REPORTING - MENTAL HEALTH IGF::CT::IGF	\$31,029.00	\$31,029.00	2015	9/30/2015	2015	SS10631150233	0	SMALL BUSINESS
HERMAN MILLER, INC.	JACKSONVILLE, FL IX41 PRODUCT AND INSTALLATION FO	\$30,969.06	\$30,969.06	2015	7/22/2015	SS001530759		0	OTHER THAN SMALL BUSINESS
TAYLOR, DONNA	VE EXPRESS REPORTING IGF::CT::IGF	\$30,963.00	\$30,963.00	2015	9/30/2015	2015	SS10541140443	0	SMALL BUSINESS
HEWITT, TERI	ME EXPRESS REPORTING - MENTAL HEALTH IGF::CT::IGF	\$30,910.00	\$30,910.00	2015	9/30/2015	2015	SS10781360003	0	SMALL BUSINESS
REHABILITATION RESOURCES	ME EXPRESS REPORTING - MENTAL HEALTH IGF::CT::IGF	\$30,874.63	\$30,874.63	2015	9/30/2015	2015	SS10631150253	0	SMALL BUSINESS
CAREER ACTION ASSOCIATES PC	VE EXPRESS REPORTING IGF::CT::IGF	\$30,855.66	\$30,855.66	2015	9/30/2015	2015	SS10541140629	0	SMALL BUSINESS
MILLER, JAMES	VE EXPRESS REPORTING IGF::CT::IGF	\$30,855.00	\$30,855.00	2015	9/30/2015	2015	SS11511280006	0	SMALL BUSINESS
TAVEL, MORTON	ME EXPRESS REPORTING - MENTAL HEALTH IGF::CT::IGF	\$30,820.00	\$30,820.00	2015	9/30/2015	2015	SS10631350006	0	SMALL BUSINESS
BRILL, ROBERT M	IGF::CL::IGF CLOSELY ASSOCIATED - INDEPENDENT CAS	\$30,780.00	\$30,780.00	2016	2/19/2016	1	SS08164C004	1	SMALL BUSINESS
DLT SOLUTIONS INCORPORATED	IGF::CT::IGF THIS IS FOR THE PURCHASE OF 100 LICENSES OF DELL TOAD DATA POINT PROFESSIONAL. THESE ARE ESSENTIAL FOR THE OFFICE OF SYSTEMS TO IMPLEMENT DATABASE MANAGEMENT AND ANALYSIS.	\$30,769.00	\$30,769.00	2016	9/23/2016	SS001630815	W91QUZ06A0004	0	SMALL BUSINESS
TURNER, MARCIA	MEDICAL CONSULTANT SERVICES - PHYSICAL CASES CLOSELY ASSOCIATED TO INHERENTLY GOVERNMENTAL FUNCTION IGF::CL::IGF FOR CLOSELY ASSOCIATED	\$30,753.75	\$30,753.75	2015	3/4/2015	13	SS041140046	0	SMALL BUSINESS

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Vendor Name	Description of Requirement	Action Obligation	Base and All Options Value	Fiscal Year	Date Signed	PO/Delivery Order/Task Order/Call#	Parent Contract	Mod #	Contracting Officers Business Size Selection
	MEDICAL CONSULTANT CONTRACTORS BLANKET PURCHASE AGREEMENT								
ALBERT F HECK MD	IGF::CT::IGF	\$30,750.00	\$30,750.00	2015	1/21/2015	5	SS001140093	0	SMALL BUSINESS
POLLY A. PETERSON, PH.D., CRC, LLC	VE EXPRESS REPORTING IGF::CT::IGF	\$30,725.00	\$30,725.00	2015	9/30/2015	2015	SS11511180099	0	SMALL BUSINESS
BRENNER, ANNE MANON MD	IGF::CL::IGF CLOSELY ASSOCIATED- MEDICAL CONSULTIN	\$30,706.00	\$30,706.00	2016	2/19/2016	3	SS08164C002	1	SMALL BUSINESS
DR TRACY GORDY	ME EXPRESS REPORTING - MENTAL HEALTH IGF::CT::IGF	\$30,660.00	\$30,660.00	2015	9/30/2015	2015	SS11521100028	0	SMALL BUSINESS
	IGF::CL::IGF								
SEYMOUR R BORTNER MD	REGION 2 MEDICAL CONSULTANTS. REVIEWS BY MEDICAL CONSULTANT OF DISABILITY CLAIM CASE FILES FOR AGENCY DISABILITY PROGRAM.	\$30,650.80	\$30,650.80	2016	3/8/2016	1	SS02164C002	0	SMALL BUSINESS
BRYANT, MARVIN	VE EXPRESS REPORTING IGF::CT::IGF	\$30,641.00	\$30,641.00	2015	9/30/2015	2015	SS10541140453	0	SMALL BUSINESS
BRILYN SERVICE INC	VE EXPRESS REPORTING IGF::CT::IGF	\$30,640.42	\$30,640.42	2015	9/30/2015	2015	SS10541140317	0	SMALL BUSINESS
STUART GITLOW MD	ME EXPRESS REPORTING - MENTAL HEALTH IGF::CT::IGF	\$30,550.00	\$30,550.00	2015	9/30/2015	2015	SS11501110030	0	SMALL BUSINESS
INTERIOR RESOURCE GROUP INC	FURNITURE FOR THE SEATTLE WASHINGTON OFFICE	\$30,524.97	\$30,524.97	2016	9/29/2016	SS101650005		0	SMALL BUSINESS
HERMAN MILLER, INC.	LUMBERTON, NC B338 DESIGN, INSTALLATION AND PRO	\$30,519.34	\$30,519.34	2015	12/15/2014	SS001431713	SS001260003	1	OTHER THAN SMALL BUSINESS
	IGF::OT::IGF								
	TASK ORDER #44 SS00-15-30660								
ADMIRAL ELEVATOR COMPANY, INC.	REMOVE WORN AND FRAYED ROLLED CARPET AND REPLACE WITH CARPET TILES.	\$30,479.42	\$30,479.42	2015	7/9/2015	SS001530660	SS001060042	0	SMALL BUSINESS
EDWARDS, CHARLIE A	VE EXPRESS REPORTING IGF::CT::IGF	\$30,433.00	\$30,433.00	2015	9/30/2015	2015	SS10541140657	0	SMALL BUSINESS
PHOENIX SOFTWARE INTERNATIONAL, INC.	PHOENIX INTERNATIONAL SOFTWARE, INC. - ADDITIONA	\$30,430.86	\$30,430.86	2015	12/9/2014	SS001060048		18	SMALL BUSINESS
YOUNGER, CRYSTAL	VE EXPRESS REPORTING IGF::CT::IGF	\$30,411.00	\$30,411.00	2015	9/30/2015	2015	SS10781160093	0	SMALL BUSINESS
MARY CATHERIN ELVIR	VE EXPRESS REPORTING IGF::CT::IGF	\$30,318.00	\$30,318.00	2015	9/30/2015	2015	SS10781160281	0	SMALL BUSINESS
	IGF::CL::IGF								
MOHNEY, CAROL	MOHNEY - CALL ORDER - REVIEWS	\$30,260.00	\$30,260.00	2015	4/10/2015	12	SS061140016	0	SMALL BUSINESS
	IGF::CL::IGF								
WATKINS, MYRON MD	WATKINS- CALL ORDER - REVIEWS	\$30,260.00	\$30,260.00	2015	4/9/2015	11	SS061140035	0	SMALL BUSINESS
	IGF::CL::IGF								
WATKINS, MYRON MD	WATKINS- CALL ORDER - REVIEWS	\$30,260.00	\$30,260.00	2015	6/25/2015	11	SS061140035	1	SMALL BUSINESS
GARNER, SYDNEY H	ME EXPRESS REPORTING - MENTAL HEALTH IGF::CT::IGF	\$30,255.16	\$30,255.16	2015	9/30/2015	2015	SS10541140022	0	SMALL BUSINESS
FREMONT, JEFFREY PHD.	ME EXPRESS REPORTING - MENTAL HEALTH IGF::CT::IGF	\$30,150.00	\$30,150.00	2015	9/30/2015	2015	SS10381130064	0	SMALL BUSINESS
	IGF::CL::IGF								
COTO, PEDRO J MD	OMA MEDICAL CONSULTANTS. REVIEWS BY MEDICAL CONSULTANT OF DISABILITY CLAIM CASE FILES FOR AGENCY DISABILITY PROGRAM. ADDING 350 CASE REVIEWS.	\$30,100.00	\$30,100.00	2016	9/12/2016	1	SS00164C009	1	SMALL BUSINESS
	IGF::CL::IGF								
SILLS MD,EDWARD M	OMA MEDICAL CONSULTANTS. REVIEWS BY MEDICAL CONSULTANT OF DISABILITY CLAIM CASE FILES FOR AGENCY DISABILITY PROGRAM. ADDING CASE REVIEWS.	\$30,100.00	\$30,100.00	2016	8/19/2016	1	SS00164C042	1	SMALL BUSINESS
	IGF::CL::IGF								
RIAZ, SYED	OMA MEDICAL CONSULTANTS. REVIEWS BY MEDICAL CONSULTANT OF DISABILITY CLAIM CASE FILES FOR AGENCY DISABILITY PROGRAM. ADDING CASES.	\$30,100.00	\$30,100.00	2016	9/6/2016	1	SS00164C070	1	SMALL BUSINESS
	IGF::CL::IGF								
	OMA MEDICAL CONSULTANTS. REVIEWS BY MEDICAL CONSULTANT OF DISABILITY CLAIM CASE FILES FOR AGENCY DISABILITY PROGRAM. ADDING NON-CASE SERVICES (AND/OR CASE REVIEWS AS APPLICABLE).								
RICHARD L COHEN DR	IGF::CL::IGF	\$30,100.00	\$30,100.00	2016	9/13/2016	1	SS00164C057	1	SMALL BUSINESS

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Vendor Name	Description of Requirement	Action Obligation	Base and All Options Value	Fiscal Year	Date Signed	PO/Delivery Order/Task Order/Call#	Parent Contract	Mod #	Contracting Officers Business Size Selection
SZS CONSULTING LTD	IGF::OT::IGF OTHER FUNCTION  MAINFRAME SOFTWARE CONSULTING TO ASSIST SSA IN OBTAINING THE BEST VALUE WHEN EXERCISING OPTION YEAR 1 OF THE IBM MAINFRAME SOFTWARE TASK ORDER SS00-15-30081.	\$30,000.00	\$30,000.00	2015	9/28/2015	SS001550316		0	OTHER THAN SMALL BUSINESS
LOCUM, INC.	REGIONAL MEDICAL CONTRACTOR SERVICES FOR REGION 10 IGF::CL::IGF CLOSELY ASSOCIATED	\$30,000.00	\$30,000.00	2016	9/15/2016	4	SS10164C002	1	SMALL BUSINESS
GIORGIO, MICHELE C	VE EXPRESS REPORTING IGF::CT::IGF	\$29,987.00	\$29,987.00	2015	9/30/2015	2015	SS10381130167	0	SMALL BUSINESS
LOCUM, INC.	REGIONAL MEDICAL CONTRACTOR SERVICES FOR REGION 10 IGF::CL::IGF CLOSELY ASSOCIATED	\$29,983.34	\$29,983.34	2016	7/18/2016	5	SS10164C002	0	SMALL BUSINESS
LOCUM, INC.	IGF::CL::IGF CLOSELY ASSOCIATED - REGIONAL MEDICA	\$29,983.33	\$29,983.33	2016	6/15/2016	2	SS10164C002	0	SMALL BUSINESS
LOCUM, INC.	IGF::CL::IGF CLOSELY ASSOCIATED - REGIONAL MEDICA	\$29,983.33	\$29,983.33	2016	6/15/2016	3	SS10164C002	0	SMALL BUSINESS
JASINSKI PHD, EDWARD	VE EXPRESS REPORTING IGF::CT::IGF	\$29,960.00	\$29,960.00	2015	9/30/2015	2015	SS10881190110	0	SMALL BUSINESS
PUBLIC HEALTH, CONNECTICUT DEPARTMENT OF	IGF::CL::IGF CLOSELY ASSOCIATED CT SS00-12-60017 RECEIPT OF NON ELECTRONIC DEATH REGISTRATION DELIVERY ORDER. 34,000 EDR RECORDS AT \$.88 PER RECORD. TOTAL DELIVERY ORDER \$29,920.00. PERIOD OF PERFORMANCE 1/01/2016 - 12/31/2016.	\$29,920.00	\$29,920.00	2016	12/22/2015	5	SS001260017	0	OTHER THAN SMALL BUSINESS
BARZEGARIAN, BEHNUSH	VE EXPRESS REPORTING IGF::CT::IGF	\$29,892.00	\$29,892.00	2015	9/30/2015	2015	SS10881190049	0	SMALL BUSINESS
MAGNUSON, BRUCE MA CRC	VE EXPRESS REPORTING IGF::CT::IGF	\$29,862.00	\$29,862.00	2015	9/30/2015	2015	SS11511180065	0	SMALL BUSINESS
JMP REHABILITATION SERVICES, LLC	VE EXPRESS REPORTING IGF::CT::IGF	\$29,834.00	\$29,834.00	2015	9/30/2015	2015	SS10631150415	0	SMALL BUSINESS
JOHNSTON, CRAIG S	VE EXPRESS REPORTING IGF::CT::IGF	\$29,821.00	\$29,821.00	2015	9/30/2015	2015	SS10631150427	0	SMALL BUSINESS
BABCOCK, ROBERT	VE EXPRESS REPORTING IGF::CT::IGF	\$29,777.00	\$29,777.00	2015	9/30/2015	2015	SS10781160113	0	SMALL BUSINESS
TRACY H YOUNG	VE EXPRESS REPORTING IGF::CT::IGF	\$29,764.00	\$29,764.00	2015	9/30/2015	2015	SS10881190099	0	SMALL BUSINESS
WILLIAM IRVIN	VE EXPRESS REPORTING IGF::CT::IGF	\$29,671.00	\$29,671.00	2015	9/30/2015	2015	SS10541140307	0	SMALL BUSINESS
COMESS, LEONARD J	IGF::CL::IGF REGION 2 MEDICAL CONSULTANTS. REVIEWS BY MEDICAL CONSULTANT OF DISABILITY CLAIM CASE FILES FOR AGENCY DISABILITY PROGRAM.	\$29,600.00	\$29,600.00	2015	2/27/2015	9	SS061140032	0	SMALL BUSINESS
COMESS, LEONARD J	IGF::CL::IGF REGION 2 MEDICAL CONSULTANTS. REVIEWS BY MEDICAL CONSULTANT OF DISABILITY CLAIM CASE FILES FOR AGENCY DISABILITY PROGRAM. MODIFICATION TO INCREASE QUANTITY AND EXTEND PERFORMANCE.	\$29,600.00	\$29,600.00	2015	6/16/2015	9	SS061140032	1	SMALL BUSINESS
COMPLETE VOCATIONAL REHABILITATION SERVICES, INC.	ME EXPRESS REPORTING - MENTAL HEALTH IGF::CT::IGF	\$29,558.80	\$29,558.80	2015	9/30/2015	2015	SS10631150203	0	SMALL BUSINESS
CARL G. LEIGH, M.D. S.C.	ME EXPRESS REPORTING - MENTAL HEALTH IGF::CT::IGF	\$29,540.00	\$29,540.00	2015	9/30/2015	2015	SS10631150182	0	SMALL BUSINESS
AROON SUANSILPPONGSE DR	DR. SUANSILPPONGSE MODIFICATION TO ADD CASES SS00-11-40032 IGF::CT::IGF	\$29,520.00	\$29,520.00	2015	4/27/2015	5	SS001140034	1	SMALL BUSINESS
ALVIN SMITH PHD	IGF::CL::IGF SMITH - CALL ORDER - REVIEWS	\$29,503.50	\$29,503.50	2015	4/14/2015	13	SS061140024	0	SMALL BUSINESS
INTEGRATED SECURITY TECHNOLOGIES, INC.	HIGF::CT::IGF ID PIVCLASS MAINTENANCE SERVICE AND SUPPORT AGREEMENT FOR THE NATIONAL SUPPORT CENTER	\$29,474.50	\$29,474.50	2016	9/28/2016	SS001650266		0	SMALL BUSINESS
WALSH, DAVID M	VE EXPRESS REPORTING IGF::CT::IGF	\$29,460.00	\$29,460.00	2015	9/30/2015	2015	SS10881190154	0	SMALL BUSINESS
FLOYD & ASSOCIATES LLC	VE EXPRESS REPORTING IGF::CT::IGF	\$29,459.00	\$29,459.00	2015	9/30/2015	2015	SS11521100065	0	SMALL BUSINESS
CHRISTOS S DAGADAKIS MD	DR. DAGADAKIS - REGION 10 ADD FUNDING AND CASE IGF::CL::IGF CLOSELY ASSOCIATED	\$29,440.00	\$29,440.00	2016	2/9/2016	2	SS10154C003	0	SMALL BUSINESS
MARTIN G BRODWIN	VE EXPRESS REPORTING IGF::CT::IGF	\$29,420.00	\$29,420.00	2015	9/30/2015	2015	SS10881190233	0	SMALL BUSINESS

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Vendor Name	Description of Requirement	Action Obligation	Base and All Options Value	Fiscal Year	Date Signed	PO/Delivery Order/Task Order/Call#	Parent Contract	Mod #	Contracting Officers Business Size Selection
JAMES R BUSKIRK MD	DR. BUSKIRK, BPA SS10-15-4C005 IGF::CL::IGF ADDITION OF INDEPENDENT CASE REVIEWS	\$29,410.00	\$29,410.00	2016	12/29/2015	2	SS10154C005	0	SMALL BUSINESS
REHABILITATION & REEMPLOYMENT INC	VE EXPRESS REPORTING IGF::CT::IGF	\$29,380.45	\$29,380.45	2015	9/30/2015	2015	SS11501110075	0	SMALL BUSINESS
HOWARD, SUSAN	VE EXPRESS REPORTING IGF::CT::IGF	\$29,376.45	\$29,376.45	2015	9/30/2015	2015	SS11501410009	0	SMALL BUSINESS
LOCUM, INC.	IGF::CL::IGF SS01-16-4C030 LOCUM, INC. CALL ORDER FOR RMC ORIENTATION SERVICES PERFORMED BY DR. JUDY BRASIER FOR THE PERIOD 3/14/2016 - 12/13/2016.  CONTRACTOR INVOICES FOR THIS ORIENTATION PERIOD SHALL BE SUBMITTED TO THE COTR AS FOLLOWS:  PAYMENT 1:CLASSROOM SESSION PAYMENT (APPROX. 80 HRS) - SUBMIT BY 04/30/2016 PAYMENT 2:FIRST 100 CASES - SUBMIT BY 6/30/2016 PAYMENT 3:SECOND 100 CASES - SUBMIT BY 08/31/2016 PAYMENT 4:THIRD 100 CASES - SUBMIT BY 10/31/2016 PAYMENT 5:REMAINING CASES- SUBMIT BY 12/31/2016	\$29,360.00	\$29,360.00	2016	2/18/2016	2	SS01164C030	0	SMALL BUSINESS
LOCUM, INC.	IGF::CL::IGF SS01-16-4C030 LOCUM, INC. CALL ORDER FOR RMC ORIENTATION SERVICES PERFORMED BY DR. MARTA MADERA RUIZ FOR THE PERIOD 3/14/2016 - 12/31/2016.  CONTRACTOR INVOICES FOR THIS ORIENTATION PERIOD SHALL BE SUBMITTED TO THE COTR AS FOLLOWS:  PAYMENT 1:CLASSROOM SESSION PAYMENT (APPROX. 80 HRS) - SUBMIT BY 04/30/2016 PAYMENT 2:FIRST 100 CASES - SUBMIT BY 6/30/2016 PAYMENT 3:SECOND 100 CASES - SUBMIT BY 08/31/2016 PAYMENT 4:THIRD 100 CASES - SUBMIT BY 10/31/2016 PAYMENT 5:REMAINING CASES- SUBMIT BY 12/31/2016	\$29,360.00	\$29,360.00	2016	2/18/2016	1	SS01164C030	0	SMALL BUSINESS

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Vendor Name	Description of Requirement	Action Obligation	Base and All Options Value	Fiscal Year	Date Signed	PO/Delivery Order/Task Order/Call#	Parent Contract	Mod #	Contracting Officers Business Size Selection
LOCUM, INC.	IGF::CL::IGF SS01-16-4C030 LOCUM, INC. CALL ORDER FOR RMC ORIENTATION SERVICES PERFORMED BY DR. RAYMOND GERBING FOR THE PERIOD 3/14/2016 - 12/13/2016.  CONTRACTOR INVOICES FOR THIS ORIENTATION PERIOD SHALL BE SUBMITTED TO THE COTR AS FOLLOWS: PAYMENT 1:CLASSROOM SESSION PAYMENT (APPROX. 80 HRS) - SUBMIT BY 04/30/2016 PAYMENT 2:FIRST 100 CASES - SUBMIT BY 6/30/2016 PAYMENT 3:SECOND 100 CASES - SUBMIT BY 08/31/2016 PAYMENT 4:THIRD 100 CASES - SUBMIT BY 10/31/2016 PAYMENT 5:REMAINING CASES- SUBMIT BY 12/31/2016	\$29,360.00	\$29,360.00	2016	3/1/2016	3	SS01164C030	0	SMALL BUSINESS
LASKY, ROBERT PHD	VE EXPRESS REPORTING IGF::CT::IGF	\$29,273.00	\$29,273.00	2015	9/30/2015	2015	SS11501110081	0	SMALL BUSINESS
KRAVITZ, ALAN DR	ME EXPRESS REPORTING - MENTAL HEALTH IGF::CT::IGF	\$29,250.00	\$29,250.00	2015	9/30/2015	2015	SS10631150336	0	SMALL BUSINESS
PUBLIC HEALTH, CONNECTICUT DEPARTMENT OF	IGF::OT::IGF OTHER FUNCTIONS CONNECTICUT ORDER FOR RECEIPT OF NON-ELECTRONIC DEATH RECORDS FOR OPTION III PERIOD OF PERFORMANCE JANARY 1 2015 -DECEMBER 31, 2015.	\$29,240.00	\$29,240.00	2015	12/22/2014	4	SS001260017	0	OTHER THAN SMALL BUSINESS
SAI R NIMMAGADDA	REGION 5 MEDICAL CONSULTANTS. REVIEWS BY MEDICAL CONSULTANT OF DISABILITY CLAIM CASE FILES FOR AGENCY DISABILITY PROGRAM. MODIFICATION TO ADD CASE REVIEWS. IGF::CL::IGF	\$29,196.80	\$29,196.80	2016	9/23/2016	2	SS05164C020	1	SMALL BUSINESS
ECOMMERCE INTELLIGENCE CORPORATION	PROVIDE GOOGLE ANALYTICS. THE AGENCY USES GOOGLE ANALYTICS FOR REPORTING ON PUBLIC WEB ACTIVITY TO SSA CONTROLLED WEBSITES. AS OF MAY 2016, GOOGLE ANALYTICS CLASSIC IS NO LONGER SUPPORTED BY GOOGLE. THIS MEANS GOOGLE WILL NO LONGER BE PROVIDING SYSTEM PATCHES, UPDATES TO CODING, OR TROUBLESHOOTING SYSTEM ERRORS. THERE IS AN IMMEDIATE NEED TO MIGRATE TO UNIVERSAL ANALYTICS TO UPGRADE OUR SYSTEM AND CONTINUE SUPPORT.  OCOMM NEEDS THE CONTRACTOR, E-NOR, TO PROVIDE THE SERVICES TO COMPLETE THE MIGRATION FROM GOOGLE ANALYTICS CLASSIC TO ANALYTICS 360 UNIVERSAL. THIS INCLUDES REPLACES OLDER DOMAIN SCRIPTS WITH ANALYTICS.JS SCRIPTS. AS PART OF THIS MIGRATION, GOOGLE TAG MANAGER AND AUDIENCE CENTER 360 SHALL BE INCLUDED. OCOMM ALSO REQUIRES THE CONTRACTOR TO CREATE A SCRIPT THAT WILL RUN ON THE SSA HOMEPAGE TO AUTOMATICALLY DETECT WHEN USERS CLICK ON A TILE.  A STATEMENT OF WORK IS INCLUDED IN THIS REQUISITION THAT OUTLINES THE ISSUE, THE SCOPE OF WORK INCLUDING THE MIGRATION SERVICES, TAG MANAGER SERVICES, AND THE DELIVERABLES, A PROJECT TIMELINE, AND PRICE QUOTE.	\$29,185.00	\$29,185.00	2016	9/30/2016	SS001650274		0	OTHER THAN SMALL BUSINESS
TETON DATA SYSTEMS INC	STATIREF MEDICAL TEXTBOOKS ONLINE - MODIFICATION	\$29,166.67	\$29,166.67	2015	12/29/2014	SS001050174		12	SMALL BUSINESS
TETON DATA SYSTEMS INC	STATIREF MEDICAL TEXTBOOKS ONLINE - MODIFICATION	\$29,166.67	\$29,166.67	2015	1/22/2015	SS001050174		13	SMALL BUSINESS



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Vendor Name	Description of Requirement	Action Obligation	Base and All Options Value	Fiscal Year	Date Signed	PO/Delivery Order/Task Order/Call#	Parent Contract	Mod #	Contracting Officers Business Size Selection
JONATHAN W NUSBAUM	ME EXPRESS REPORTING - MENTAL HEALTH IGF::CT::IGF	\$29,160.00	\$29,160.00	2015	9/30/2015	2015	SS10631150238	0	SMALL BUSINESS
CONROE, HENRY DR MD SC	REGION V MEDICAL CONSULTANT SERVICES FOR THE SOCIAL SECURITY ADMINISTRATION. REVIEWS BY MEDICAL CONSULTANT OF DISABILITY CLAIM CASE FILES FOR AGENCY DISABILITY PROGRAM. AWARDING DR. HENRY CONROE NON-CASE SERVICES. IGF::CL::IGF	\$29,124.32	\$29,124.32	2016	6/29/2016	3	SS05164C029	0	SMALL BUSINESS
GARY BENNETT	ME EXPRESS REPORTING - MENTAL HEALTH IGF::CT::IGF	\$29,104.80	\$29,104.80	2015	9/30/2015	2015	SS10381130048	0	SMALL BUSINESS
HERMAN MILLER, INC.	GERMANTOWN, PA B218 - DESIGN, INSTALLATION AND	\$29,052.34	\$29,052.34	2015	3/19/2015	SS001530326	SS001260003	0	OTHER THAN SMALL BUSINESS
AUDREY S. COWART, LLC	VE EXPRESS REPORTING IGF::CT::IGF	\$29,051.99	\$29,051.99	2015	9/30/2015	2015	SS10541340003	0	SMALL BUSINESS
TOM ENGLAND PHD	VE EXPRESS REPORTING IGF::CT::IGF	\$29,040.00	\$29,040.00	2015	9/30/2015	2015	SS10691170008	0	SMALL BUSINESS
SABREE, INC.	IGF::OT::IGF ADD ADDITIONAL CLINS FOR CARPET TILE REMOVAL ONLY  ASBESTOS REMEDIATION AND REMOVAL SERVICE FIRM-FIXED PRICE (IDIQ) CONTRACT AT THE SOCIAL SECURITY ADMINISTRATION'S HEADQUARTERS BUILDINGS AND OUTLYING BUILDINGS LOCATED IN BALTIMORE, MARYLAND	\$0.00	\$28,872.00	2015	12/15/2014	SS001461113		1	SMALL BUSINESS
ANNE ARRINGTON	VE EXPRESS REPORTING IGF::CT::IGF	\$28,852.00	\$28,852.00	2015	9/30/2015	2015	SS11511180019	0	SMALL BUSINESS
MARTIN, HILDA KLEIN	IGF::CL::IGF REGION 5 MEDICAL CONSULTANTS. REVIEWS BY MEDICAL CONSULTANT OF DISABILITY CLAIM CASE FILES FOR AGENCY DISABILITY PROGRAM. CALL ORDER TO HILDA MARTIN.	\$28,740.60	\$28,740.60	2016	3/18/2016	1	SS05164C013	0	SMALL BUSINESS
BARNES, LOUIS J	REGION V MEDICAL CONSULTANT SERVICES FOR THE SOCIAL SECURITY ADMINISTRATION. REVIEWS BY MEDICAL CONSULTANT OF DISABILITY CLAIM CASE FILES FOR AGENCY DISABILITY PROGRAM. IGF::CL::IGF	\$28,740.60	\$28,740.60	2016	6/30/2016	2	SS05164C018	0	SMALL BUSINESS
KRISTY FARNSWORTH PHD	VE EXPRESS REPORTING IGF::CT::IGF	\$28,710.00	\$28,710.00	2015	9/30/2015	2015	SS11511180069	0	SMALL BUSINESS
COYLE PHD, ROBERT T	MEDICAL CONSULTANT SERVICES - MENTAL CASES CLOSELY ASSOCIATED TO INHERENTLY GOVERNMENTAL FUNCTION IGF::CL::IGF	\$28,703.50	\$28,703.50	2015	6/22/2015	10	SS041140068	1	SMALL BUSINESS
BITTINGER CORP.	MEDICAL CONTRACTOR SERVICES - PHYSICAL CASES CLOSELY ASSOCIATED TO INHERENTLY GOVERNMENTAL FUNCTION IGF::CL::IGF	\$28,703.50	\$28,703.50	2015	4/13/2015	19	SS041140038	1	SMALL BUSINESS
LARRY V CALDWELL MD	MEDICAL CONTRACTOR SERVICES - PHYSICAL CASES CLOSELY ASSOCIATED TO INHERENTLY GOVERNMENTAL FUNCTION IGF::CL::IGF	\$28,703.50	\$28,703.50	2015	4/13/2015	17	SS041040096	1	SMALL BUSINESS
CHAHAL, RAMAN GILL MD	MEDICAL CONSULTANT CONTRACTORS BLANKET PURCHASE AGREEMENT IGF::CL::IGF	\$28,700.00	\$28,700.00	2015	1/28/2015	6	SS001140127	0	SMALL BUSINESS
HAYNE JR, VAN B.	REGION 4 MEDICAL CONTRACTOR SERVICES - RMA PHYSICAL FOR BSSC BIRMINGHAM, AL IGF::CL::IGF	\$28,695.00	\$28,695.00	2016	7/27/2016	1	SS04164C060	0	SMALL BUSINESS
ZUMALT, DAN	VE EXPRESS REPORTING IGF::CT::IGF	\$28,664.54	\$28,664.54	2015	9/30/2015	2015	SS10691170043	0	SMALL BUSINESS

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Vendor Name	Description of Requirement	Action Obligation	Base and All Options Value	Fiscal Year	Date Signed	PO/Delivery Order/Task Order/Call#	Parent Contract	Mod #	Contracting Officers Business Size Selection
CAMPION MD, ROBERT	IGF::CL::IGF REGION 2 MEDICAL CONSULTANTS. REVIEWS BY MEDICAL CONSULTANT OF DISABILITY CLAIM CASE FILES FOR AGENCY DISABILITY PROGRAM. MODIFICATION TO INCREASE QUANTITY AND EXTEND PERFORMANCE.	\$28,567.00	\$28,567.00	2015	6/12/2015	8	SS021140072	1	SMALL BUSINESS
RICHARD J WAGMAN MD	ME EXPRESS REPORTING - MENTAL HEALTH IGF::CT::IGF	\$28,550.00	\$28,550.00	2015	9/30/2015	2015	SS10251120090	0	SMALL BUSINESS
DRS MARTINEZ & MARTINEZ PC	IGF::CL::IGF CLOSELY ASSOCIATED NEW CALL ORDER F	\$28,500.00	\$28,500.00	2016	2/5/2016	1	SS08164C016	1	SMALL BUSINESS
FERLIC, DONALD C.	IGF::CL::IGF CLOSELY ASSOCIATED - INDEPENDENT CASE	\$28,500.00	\$28,500.00	2016	2/19/2016	1	SS08164C005	1	SMALL BUSINESS
TELLA, NALINAKSHI	IGF::CL::IGF CLOSELY ASSOCIATED - REGIONAL MEDICA	\$28,490.00	\$28,490.00	2016	3/23/2016	1	SS07164C024	0	SMALL BUSINESS
GOLUB, HERBERT P.	ME EXPRESS REPORTING - MENTAL HEALTH IGF::CT::IGF	\$28,450.00	\$28,450.00	2015	9/30/2015	2015	SS11501110058	0	SMALL BUSINESS
WESTERN SLOPE REHABILITATION, INC.	VE EXPRESS REPORTING IGF::CT::IGF	\$28,446.00	\$28,446.00	2015	9/30/2015	2015	SS11511180111	0	SMALL BUSINESS
WIL NELP MD	VE EXPRESS REPORTING IGF::CT::IGF	\$28,410.00	\$28,410.00	2015	9/30/2015	2015	SS11521100046	0	SMALL BUSINESS
HANEY, LARRY VOCATIONAL SERVICES	VE EXPRESS REPORTING IGF::CT::IGF	\$28,399.00	\$28,399.00	2015	9/30/2015	2015	SS10881490002	0	SMALL BUSINESS
EAST BAY MUNICIPL UTILITY DISTR	FHFB UTILITIES - WATER (PP = 11/1/16-10/31/17). TO PROVIDE WATER SERVICES FOR THE BUILDING, DRINKING FOUNTAINS AND FIRE SUPPRESSION AT THE FRANK HAGEL FEDERAL BUILDING. SOLE SOURCE CONTRACT.  IGF::CT::IGF	\$28,380.00	\$28,380.00	2017	10/18/2016	SS091751001		0	OTHER THAN SMALL BUSINESS
PUBLIC HEALTH AND ENVIRONMENT, COLORADO DEPARTMENT OF	IGF::OT::IGF OTHER FUNCTIONS COLORADO NON-ELECTRONIC DEATH RECORDS FOR OPTION YEAR III, PERIOD OF PERFORMANCE FROM JANUARY 1, 2015 - DECEMBER 31, 2015.	\$28,380.00	\$28,380.00	2015	12/22/2014	4	SS001260016	0	OTHER THAN SMALL BUSINESS
HERMAN MILLER, INC.	OWINGS MILLS, MD #1197 - RECONFIGURE TWO (2) X3-0	\$28,369.62	\$28,369.62	2016	8/3/2016	SS001630619	SS001260003	0	OTHER THAN SMALL BUSINESS
HERMAN MILLER, INC.	TO RECONFIGURED TWO (2) X3-01 WORKSTATIONS AND	\$28,369.62	\$28,369.62	2016	8/3/2016	SS001630624	SS001260003	0	OTHER THAN SMALL BUSINESS
HOLLY, LEAH P	IGF::CL::IGF RMC CALL ORDER - REVIEW ADDITIONAL 375 CASES	\$28,368.75	\$28,368.75	2015	2/3/2015	11	SS061140012	0	SMALL BUSINESS
TECHFIRST, INC.	IGF::CT::IGF SIGN LANGUAGE INTERPRETER SERVICES AS A REASONABLE ACCOMMODATION FOR AN EMPLOYEE WHO IS DEAF OR HARD OF HEARING	\$28,334.70	\$28,334.70	2016	9/13/2016	SS001650255		0	SMALL BUSINESS
LUSTIG, DANIEL C.	VE EXPRESS REPORTING IGF::CT::IGF	\$28,325.00	\$28,325.00	2015	9/30/2015	2015	SS10541140515	0	SMALL BUSINESS
DILLON SNOWDEN	VE EXPRESS REPORTING IGF::CT::IGF	\$28,285.00	\$28,285.00	2015	9/30/2015	2015	SS10781160249	0	SMALL BUSINESS
THE AXON GROUP	IGF::CL::IGF REGION 2 MEDICAL CONSULTANTS. REVIEWS BY MEDICAL CONSULTANT OF DISABILITY CLAIM CASE FILES FOR AGENCY DISABILITY PROGRAM.	\$28,276.50	\$28,276.50	2015	2/20/2015	5	SS021240003	0	SMALL BUSINESS
FELDMAN, HOWARD	VE EXPRESS REPORTING IGF::CT::IGF	\$28,232.00	\$28,232.00	2015	9/30/2015	2015	SS10541140639	0	SMALL BUSINESS
RUBIN, STEPHEN PHD	VE EXPRESS REPORTING IGF::CT::IGF	\$28,230.00	\$28,230.00	2015	9/30/2015	2015	SS11521100044	0	SMALL BUSINESS
NEOPOST USA INC.	IGF::OT::IGF STANDARD MAINTENANCE FOR NEOPOST F	\$5,634.12	\$28,170.60	2016	2/4/2016	SS041650003		0	OTHER THAN SMALL BUSINESS
HEALTH, MISSISSIPPI STATE DEPARTMENT OF	IGF::CL::IGF CLOSELY ASSOCIATED MS SS00-12-60025 NON-ELECTRONIC DEATH REGISTRATION DELIVERY ORDER. 32,000 NON-EDR RECORDS TOTAL DELIVERY ORDER \$28,160.00. PERIOD OF PERFORMANCE 1/01/2016 - 12/31/2016.	\$28,160.00	\$28,160.00	2016	12/22/2015	5	SS001260025	0	OTHER THAN SMALL BUSINESS
OFFICE OF THE GOVERNOR	IGF::CL::IGF CLOSELY ASSOCIATED REQUEST FUNDING FOR NON-EDR 2016 CONTRACT YEAR FOR PUERTO RICO.	\$28,160.00	\$28,160.00	2016	12/22/2015	5	SS001260048	0	OTHER THAN SMALL BUSINESS
JUSINO-BERRIOS, CARLOS M	IGF::CL::IGF REGION 2 MEDICAL CONSULTANTS. REVIEWS BY MEDICAL CONSULTANT OF DISABILITY CLAIM CASE FILES FOR AGENCY DISABILITY PROGRAM. MODICATION TO INCREASE QUANTITY AND EXTEND PERFORMANCE.	\$28,147.00	\$28,147.00	2015	12/17/2014	11	SS021140086	2	SMALL BUSINESS

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Vendor Name	Description of Requirement	Action Obligation	Base and All Options Value	Fiscal Year	Date Signed	PO/Delivery Order/Task Order/Call#	Parent Contract	Mod #	Contracting Officers Business Size Selection
GARY FRANKLIN SPITZ	IGF::CL::IGF REGION 2 MEDICAL CONSULTANTS. REVIEWS BY MEDICAL CONSULTANT OF DISABILITY CLAIM CASE FILES FOR AGENCY DISABILITY PROGRAM. MODIFICATION TO ADD CASE REVIEWS AND EXTEND PERFORMANCE PERIOD.	\$28,147.00	\$28,147.00	2015	12/16/2014	10	SS021140106	3	SMALL BUSINESS
JOSE J RABELO MD	IGF::CL::IGF REGION 2 MEDICAL CONSULTANTS. REVIEWS BY MEDICAL CONSULTANT OF DISABILITY CLAIM CASE FILES FOR AGENCY DISABILITY PROGRAM. MODIFICATION TO INCREASE CASES.	\$28,147.00	\$28,147.00	2015	12/17/2014	12	SS021140104	3	SMALL BUSINESS
CHENEY, RICHARD	VE EXPRESS REPORTING IGF::CT::IGF	\$28,129.00	\$28,129.00	2015	9/30/2015	2015	SS11521100051	0	OTHER THAN SMALL BUSINESS
SNYDER, LYNN E	IGF::CL::IGF CLOSELY ASSOCIATED - REGIONAL MEDICAL	\$28,120.00	\$28,120.00	2016	2/18/2016	1	SS08164C021	1	SMALL BUSINESS
DONALD L HECKER	ME EXPRESS REPORTING - MENTAL HEALTH IGF::CT::IGF	\$27,901.60	\$27,901.60	2015	9/30/2015	2015	SS10631150125	0	SMALL BUSINESS
KASEY SUGGS	VE EXPRESS REPORTING IGF::CT::IGF	\$27,867.00	\$27,867.00	2015	9/30/2015	2015	SS10781160255	0	SMALL BUSINESS
WORLD OF WORK INC	VE EXPRESS REPORTING IGF::CT::IGF	\$27,838.00	\$27,838.00	2015	9/30/2015	2015	SS10781160261	0	SMALL BUSINESS
JILL BROWN CASE MANAGEMENT	VE EXPRESS REPORTING IGF::CT::IGF	\$27,823.00	\$27,823.00	2015	9/30/2015	2015	SS11501110015	0	SMALL BUSINESS
NORTHWEST DISABILITY MANAGEMENT	VE EXPRESS REPORTING IGF::CT::IGF	\$27,821.00	\$27,821.00	2015	9/30/2015	2015	SS11521100095	0	SMALL BUSINESS
HEALTH, HAWAII DEPARTMENT OF	IGF::CL::IGF CLOSELY ASSOCIATED HI SS00-12-60011 ELECTRONIC DEATH REGISTRATION DELIVERY ORDER. 10,000 EDR RECORDS TOTAL DELIVERY ORDER \$27,750.00. PERIOD OF PERFORMANCE 1/01/2016 - 12/31/2016.	\$27,750.00	\$27,750.00	2016	12/22/2015	5	SS001260011	0	OTHER THAN SMALL BUSINESS
PUBLIC HEALTH AND HUMAN SERVICES, MONTANA DEPARTMENT OF	IGF::CL::IGF CLOSELY ASSOCIATED MT SS00-12-60027 ELECTRONIC DEATH REGISTRATION DELIVERY ORDER. 10,000 EDR RECORDS TOTAL DELIVERY ORDER \$27,750.00. PERIOD OF PERFORMANCE 1/01/2016 - 12/31/2016.	\$27,750.00	\$27,750.00	2016	12/22/2015	5	SS001260027	0	OTHER THAN SMALL BUSINESS
SHI INTERNATIONAL CORP.	COREL WINZIP AND PREMIUM ENTERPRISE	\$27,728.79	\$27,728.79	2016	4/15/2016	SS001650103		0	OTHER THAN SMALL BUSINESS
LANGLEY, ZACHARIAH R	ME EXPRESS REPORTING - MENTAL HEALTH IGF::CT::IGF	\$27,699.70	\$27,699.70	2015	9/30/2015	2015	SS10781360015	0	SMALL BUSINESS
HARRIS, THERESE	RIGIGF::CL::IGF CLOSELY ASSOCIATED MODIFICATION TO CALL ORDER ADDITION 350 INDEPENDENT DISABILITY CASE REVIEWS AT \$79.07 FOR A TOTAL OF \$27,674.50.	\$27,674.50	\$27,674.50	2016	2/1/2016	10	SS011140018	1	SMALL BUSINESS
HEINEMANN, ALLEN	ME EXPRESS REPORTING - MENTAL HEALTH IGF::CT::IGF	\$27,650.00	\$27,650.00	2015	9/30/2015	2015	SS10631150066	0	SMALL BUSINESS
JANET C ROGERS	ME EXPRESS REPORTING - MENTAL HEALTH IGF::CT::IGF	\$27,624.00	\$27,624.00	2015	9/30/2015	2015	SS10631150323	0	SMALL BUSINESS
E T KURATA	VE EXPRESS REPORTING IGF::CT::IGF	\$27,609.00	\$27,609.00	2015	9/30/2015	2015	SS10881190031	0	SMALL BUSINESS
DEAN DEBBIE B	VE EXPRESS REPORTING IGF::CT::IGF	\$27,582.90	\$27,582.90	2015	9/30/2015	2015	SS10541140509	0	SMALL BUSINESS
HERMAN MILLER, INC.	CONCORD, NH #A010 DESIGN, INSTALLATION AND PROD	\$27,540.05	\$27,540.05	2015	12/3/2014	SS001530141		0	OTHER THAN SMALL BUSINESS
JAMES F WARGEL	ME EXPRESS REPORTING - MENTAL HEALTH IGF::CT::IGF	\$27,540.00	\$27,540.00	2015	9/30/2015	2015	SS10631150218	0	SMALL BUSINESS
WEINGARTEN, GERALD M.D. INC	VE EXPRESS REPORTING IGF::CT::IGF	\$27,530.00	\$27,530.00	2015	9/30/2015	2015	SS10881190132	0	SMALL BUSINESS
HEALTH, MISSISSIPPI STATE DEPARTMENT OF	IGF::OT::IGF OTHER FUNCTIONS MS RECEIPT OF NON-ELECTRONIC DEATH RECORDS FOR OPTION YEAR III PERIOD OF PERFORMANCE JANUARY 1, 2015 - DECEMBER 31, 2015.	\$27,520.00	\$27,520.00	2015	12/22/2014	4	SS001260025	0	OTHER THAN SMALL BUSINESS
OFFICE OF THE GOVERNOR	IGF::OT::IGF OTHER FUNCTIONS PR RECEIPT OF NON-ELECTRONIC DEATH RECORDS FOR OPTION YEAR III PERIOD OF PERFORMANCE JANUARY 1, 2015 - DECEMBER 31, 2015.	\$27,520.00	\$27,520.00	2015	12/22/2014	4	SS001260048	0	OTHER THAN SMALL BUSINESS
M V R CONSULTING SERVICES INC	VE EXPRESS REPORTING IGF::CT::IGF	\$27,520.00	\$27,520.00	2015	9/30/2015	2015	SS11511180049	0	SMALL BUSINESS
VEITH, EMILY	VE EXPRESS REPORTING IGF::CT::IGF	\$27,459.54	\$27,459.54	2015	9/30/2015	2015	SS10631250006	0	SMALL BUSINESS
HERMAN MILLER, INC.	SYSTEMS FURNITURE - SARASOTA, FL X667 DESIGN, PRO	\$27,454.74	\$27,454.74	2017	11/28/2016	SS001730045	SS001260003	0	OTHER THAN SMALL BUSINESS
FIRELINE CORPORATION, THE	IGF::OT::IGF - PURCHASE ORDER SS00-15-50289 FOR TAP	\$27,450.00	\$27,450.00	2015	9/17/2015	SS001550289		0	OTHER THAN SMALL BUSINESS
TONI MARTIN MD	MEDICAL CONSULTANT SERVICES TONI MARTIN IGF::CL::IGF	\$27,435.75	\$27,435.75	2016	2/18/2016	1	SS09164C014	0	SMALL BUSINESS

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BARNES, LAVERNE MONISE	MEDICAL CONSULTANT SERVICES DR. LAVERNE BARNES IGF::CL::IGF	\$27,372.00	\$27,372.00	2016	3/15/2016	1	SS05164C002	0	SMALL BUSINESS
PERRY GROSSMAN MD	ME EXPRESS REPORTING - MENTAL HEALTH IGF::CT::IGF	\$27,360.00	\$27,360.00	2015	9/30/2015	2015	SS11521100026	0	SMALL BUSINESS
ELLIOTT J GOYTIA, MD, MA	IGF::CL::IGF REGIONAL MEDICAL CONSULTANT SERVICES FOR THE SOCIAL SECURITY ADMINISTRATION. REVIEWS BY MEDICAL CONSULTANT OF DISABILITY CLAIM CASE FILES FOR AGENCY DISABILITY PROGRAM. INCREASE QUANTITY CASE REVIEWS.	\$27,337.20	\$27,337.20	2016	5/11/2016	1	SS02164C011	2	SMALL BUSINESS
LUCAS, FRANK	VE EXPRESS REPORTING IGF::CT::IGF	\$27,323.00	\$27,323.00	2015	9/30/2015	2015	SS11521100109	0	SMALL BUSINESS
CREATIVE BUSINESS SOLUTIONS, INC.	IGF::OT::IGF LABOR AND MOVING SERVICE CONTRACT. M	\$26,464.00	\$27,274.00	2016	9/29/2016	SS001560040		4	SMALL BUSINESS
DON R CLARK MD	ME EXPRESS REPORTING - MENTAL HEALTH IGF::CT::IGF	\$27,150.00	\$27,150.00	2015	9/30/2015	2015	SS10781160072	0	SMALL BUSINESS
DW STRATEGIC SOLUTIONS LLC	IGF::CL::IGF BLANKET PURCHASE AGREEMENTS FOR CONTRACTORS TO PROVIDE REGIONAL MEDICAL CONSULTANT SERVICES FOR THE SOCIAL SECURITY ADMINISTRATION. REVIEWS BY MEDICAL CONSULTANT OF DISABILITY CLAIM CASE FILES FOR AGENCY DISABILITY PROGRAM. MODIFICATION TO ADD CASES AND EXTEND THE PERIOD OF PERFORMANCE.	\$27,105.00	\$27,105.00	2016	7/31/2016	1	SS09164C055	1	SMALL BUSINESS
GILMAN, MURRY J DR	MEDICAL CONSULTANT SERVICES - PHYSICAL CASES CLOSELY ASSOCIATED TO INHERENTLY GOVERNMENTAL FUNCTION IGF::CL::IGF	\$27,063.30	\$27,063.30	2015	12/11/2014	14	SS041140042	0	SMALL BUSINESS
DARRELL R CAUDILL M D	MEDICAL CONTRACTING SERVICES - PHYSICAL CASES CLOSELY ASSOCIATED TO INHERENTLY GOVERNMENTAL FUNCTION IGF::CL::IGF	\$27,063.30	\$27,063.30	2015	12/11/2014	11	SS041140035	0	SMALL BUSINESS
HEALTH, HAWAII DEPARTMENT OF	IGF::OT::IGF OTHER FUNCTIONS HAWAII RECEIPT OF ELECTRONIC DEATH RECORDS FOR OPTION YEAR III PERIOD OF PERFORMANCE JANUARY 1, 2015 - DECEMBER 31, 2015.	\$27,050.00	\$27,050.00	2015	12/22/2014	4	SS001260011	0	OTHER THAN SMALL BUSINESS
PUBLIC HEALTH AND HUMAN SERVICES, MONTANA DEPARTMENT OF	IGF::OT::IGF OTHER FUNCTIONS MT RECEIPT OF ELECTRONIC DEATH RECORDS FOR OPTION YEAR III PERIOD OF PERFORMANCE JANUARY 1, 2015 - DECEMBER 31, 2015.	\$27,050.00	\$27,050.00	2015	12/22/2014	4	SS001260027	0	OTHER THAN SMALL BUSINESS
SCHWEID, DANIEL E MD	ME EXPRESS REPORTING - MENTAL HEALTH IGF::CT::IGF	\$27,030.00	\$27,030.00	2015	9/30/2015	2015	SS10631150198	0	SMALL BUSINESS
DAVID A. ZAK & ASSOCIATES, L.L.C.	VE EXPRESS REPORTING IGF::CT::IGF	\$26,970.00	\$26,970.00	2015	9/30/2015	2015	SS10381130245	0	SMALL BUSINESS
ROBERTA A SCHULMAN PHD	IGF::CL::IGF CREATE A NEW CALL ORDER FOR AWARD SS	\$26,950.00	\$26,950.00	2016	5/26/2016	1	SS00164C041	0	SMALL BUSINESS
COTO, PEDRO J MD	IGF::CL::IGF OMA MEDICAL CONSULTANTS. REVIEWS BY MEDICAL CONSULTANT OF DISABILITY CLAIM CASE FILES FOR AGENCY DISABILITY PROGRAM.	\$26,950.00	\$26,950.00	2016	5/27/2016	1	SS00164C009	0	SMALL BUSINESS
MARIA GUMBINAS	IGF::CL::IGF OMA MEDICAL CONSULTANTS. REVIEWS BY MEDICAL CONSULTANT OF DISABILITY CLAIM CASE FILES FOR AGENCY DISABILITY PROGRAM.	\$26,950.00	\$26,950.00	2016	5/25/2016	1	SS00164C021	0	SMALL BUSINESS
KEVIN YI	ME EXPRESS REPORTING - MENTAL HEALTH IGF::CT::IGF	\$26,935.00	\$26,935.00	2015	9/30/2015	2015	SS10631150409	0	SMALL BUSINESS
MIDWEST CASE MANAGEMENT, INC.	VE EXPRESS REPORTING IGF::CT::IGF	\$26,906.00	\$26,906.00	2015	9/30/2015	2015	SS10631150433	0	OTHER THAN SMALL BUSINESS
FLANNERY JR, RAYMOND B	IGF::CL::IGF - SS01-16-4C009 - FLANNERY, RAYMOND CALL ORDER FOR 340 INDEPENDENT DISABILITY CASE REVIEWS FOR THE PERIOD 4/1/2016 - 3/31/2017. THE RATE OF PAY IS \$79.00 PER CASE FOR TOTAL FUNDING OF \$ \$26,860.	\$26,860.00	\$26,860.00	2016	2/16/2016	1	SS01164C009	0	SMALL BUSINESS

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GROSS, RICHARD S. PHD, PC	VE EXPRESS REPORTING IGF::CT::IGF	\$26,830.00	\$26,830.00	2015	9/30/2015	2015	SS10541140098	0	SMALL BUSINESS
LAPLANTE, LOUIS	VE EXPRESS REPORTING IGF::CT::IGF	\$26,823.42	\$26,823.42	2015	9/30/2015	2015	SS11501110031	0	SMALL BUSINESS
CAPIELANO & ASSOCIATES INC	VE EXPRESS REPORTING IGF::CT::IGF	\$26,790.00	\$26,790.00	2015	9/30/2015	2015	SS10781160115	0	SMALL BUSINESS
TONE SOFTWARE INC	MODIFICATION 001 TO UPGRADE LICENSE AND MAINTEN	\$26,786.00	\$26,786.00	2015	9/11/2015	SS001550134		1	OTHER THAN SMALL BUSINESS
VOCATIONAL CONCEPTS LLC	VE EXPRESS REPORTING IGF::CT::IGF	\$26,776.00	\$26,776.00	2015	9/30/2015	2015	SS10541340049	0	SMALL BUSINESS
SHERMAN, MIRIAM MD	ME EXPRESS REPORTING - MENTAL HEALTH IGF::CT::IGF	\$26,760.00	\$26,760.00	2015	9/30/2015	2015	SS10881190036	0	SMALL BUSINESS
JEFFERSON COUNSELING SERVICES, INC.	VE EXPRESS REPORTING IGF::CT::IGF	\$26,716.00	\$26,716.00	2015	9/30/2015	2015	SS10781160159	0	SMALL BUSINESS
KAREN KANE	VE EXPRESS REPORTING IGF::CT::IGF	\$26,708.00	\$26,708.00	2015	9/30/2015	2015	SS10381130035	0	SMALL BUSINESS
PITNEY BOWES INC.	PRINT MAIL FACILITY PRODUCTION INVENTORY	\$26,701.05	\$26,701.05	2016	3/16/2016	SS001650085		0	OTHER THAN SMALL BUSINESS
GAIR, CELINE PAYNE PHD	MEDICAL CONTRACTOR SERVICES - MENTAL CASES CLOSELY ASSOCIATED TO INHERENTLY GOVERNMENTAL FUNCTION IGF::CL::IGF	\$26,653.25	\$26,653.25	2015	3/31/2015	15	SS041040091	2	SMALL BUSINESS
SCHADER, DONALD	VE EXPRESS REPORTING IGF::CT::IGF	\$26,651.00	\$26,651.00	2015	9/30/2015	2015	SS10251120057	0	SMALL BUSINESS
RAULSTON, OLLIE D	ME EXPRESS REPORTING - MENTAL HEALTH IGF::CT::IGF	\$26,650.00	\$26,650.00	2015	9/30/2015	2015	SS10781160098	0	SMALL BUSINESS
CRAYTON REHAB AND COUNSELING SERVICES	VE EXPRESS REPORTING IGF::CT::IGF	\$26,607.00	\$26,607.00	2015	9/30/2015	2015	SS10781160061	0	SMALL BUSINESS
RUBINOWITZ, MARTIN DR PC	IGF::CL::IGF CLOSELY ASSOCIATED - NEW CALL ORDER F	\$26,600.00	\$26,600.00	2016	12/18/2015	1	SS08164C020	0	SMALL BUSINESS
BERKOWITZ, MARK PSY D	IGF::CL::IGF CLOSELY ASSOCIATED - REGIONAL MEDICAL	\$26,600.00	\$26,600.00	2016	6/9/2016	4	SS08164C001	0	SMALL BUSINESS
STEVEN H SUTHERLAND, PH D	ME EXPRESS REPORTING - MENTAL HEALTH IGF::CT::IGF	\$26,580.00	\$26,580.00	2015	9/30/2015	2015	SS10781160168	0	SMALL BUSINESS
MOHAMMED MD, SHAKIL	ME EXPRESS REPORTING - MENTAL HEALTH IGF::CT::IGF	\$26,490.00	\$26,490.00	2015	9/30/2015	2015	SS10541140100	0	SMALL BUSINESS
ALVIN SMITH PHD	IGF::CL::IGF SMITH - CALL ORDER - CASES	\$26,477.50	\$26,477.50	2015	9/1/2015	14	SS061140024	2	SMALL BUSINESS
PUBLIC HEALTH, ILLINOIS DEPARTMENT OF	IGF::CL::IGF CLOSELY ASSOCIATED IL SS00-12-60036 ELECTRONIC DEATH REGISTRATION DELIVERY ORDER. 114,282 EDR RECORDS TOTAL DELIVERY ORDER \$317,131.76. PERIOD OF PERFORMANCE 1/01/2016 - 12/31/2016.	\$26,419.58	\$26,419.58	2016	12/23/2015	5	SS001260036	0	OTHER THAN SMALL BUSINESS
DITRAGLIA PEDIATRICS	ME EXPRESS REPORTING - MENTAL HEALTH IGF::CT::IGF	\$26,390.00	\$26,390.00	2015	9/30/2015	2015	SS10631150284	0	OTHER THAN SMALL BUSINESS
EDGE, MICHELE	VE EXPRESS REPORTING IGF::CT::IGF	\$26,266.00	\$26,266.00	2015	9/30/2015	2015	SS10631150423	0	SMALL BUSINESS
ADMIRAL ELEVATOR COMPANY, INC.	IGF::OT::IGF  TASK ORDER #50  REPLACE APPROXIMATELY 450 SQUARE YARD OF WORN AND DAMAGED CARPET WITHIN THE NATIONAL COMPUTER CENTER CAFE LOUNGE	\$26,258.00	\$26,258.00	2015	8/25/2015	SS001530830	SS001060042	0	SMALL BUSINESS
WINSLOW MD, RICHARD S	IGF::CL::IGF WINSLOW, MC, REG. 10 INDEPENDENT CASE REVIEWS	\$26,240.00	\$26,240.00	2015	4/9/2015	1	SS10154C011	0	SMALL BUSINESS
REGIONAL REHAB INC	VE EXPRESS REPORTING IGF::CT::IGF	\$26,176.63	\$26,176.63	2015	9/30/2015	2015	SS11521100007	0	SMALL BUSINESS
CAROL O MOSLEY	ME EXPRESS REPORTING - MENTAL HEALTH IGF::CT::IGF	\$26,139.00	\$26,139.00	2015	9/30/2015	2015	SS10631150401	0	SMALL BUSINESS
WALSH, WALTER BRUCE	ME EXPRESS REPORTING - MENTAL HEALTH IGF::CT::IGF	\$26,128.00	\$26,128.00	2015	9/30/2015	2015	SS10631150197	0	SMALL BUSINESS
GARY FRANKLIN SPITZ	IGF::CL::IGF  REGION 2 MEDICAL CONSULTANTS. REVIEWS BY MEDICAL CONSULTANT OF DISABILITY CLAIM CASE FILES FOR AGENCY DISABILITY PROGRAM. MODIFICATION TO PROVIDE ADDITIONAL CASE REVIEWS AND EXTEND PERIOD OF PERFORMANCE.	\$26,118.40	\$26,118.40	2016	12/22/2015	13	SS021140106	2	SMALL BUSINESS
MILLS, CASSIE	VE EXPRESS REPORTING IGF::CT::IGF	\$26,100.00	\$26,100.00	2015	9/30/2015	2015	SS11511380001	0	SMALL BUSINESS
DAVID G. JARMON, PH.D., L.L.C.	ME EXPRESS REPORTING - MENTAL HEALTH IGF::CT::IGF	\$26,080.00	\$26,080.00	2015	9/30/2015	2015	SS10881190112	0	SMALL BUSINESS
NIKONOVICH-KAHN, CHERYL	VE EXPRESS REPORTING IGF::CT::IGF	\$25,984.00	\$25,984.00	2015	9/30/2015	2015	SS10631450011	0	SMALL BUSINESS
HOLWERDA, DAVID JOHN	ME EXPRESS REPORTING - MENTAL HEALTH IGF::CT::IGF	\$25,976.06	\$25,976.06	2015	9/30/2015	2015	SS10631150145	0	SMALL BUSINESS
PRIME CARE SERVICES	VE EXPRESS REPORTING IGF::CT::IGF	\$25,974.00	\$25,974.00	2015	9/30/2015	2015	SS10541140339	0	SMALL BUSINESS
WEST M.D., DAVID A.	ME EXPRESS REPORTING - MENTAL HEALTH IGF::CT::IGF	\$25,890.00	\$25,890.00	2015	9/30/2015	2015	SS10881190076	0	SMALL BUSINESS
LEVIN PROFESSIONAL SERVICES, INC.	COMPIX MEDIA CYNERG2 SYSTEMS FOR GRAPHIC DISPLA	\$25,866.50	\$25,866.50	2016	9/12/2016	SS001650232		0	SMALL BUSINESS

Sole Source Contracts  
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Vendor Name	Description of Requirement	Action Obligation	Base and All Options Value	Fiscal Year	Date Signed	PO/Delivery Order/Task Order/Call#	Parent Contract	Mod #	Contracting Officers Business Size Selection
BUSINESS STAFFING OF AMERICA, INC.	IGF::CL::IGF OMA MEDICAL CONSULTANTS. REVIEWS BY MEDICAL CONSULTANT OF DISABILITY CLAIM CASE FILES FOR AGENCY DISABILITY PROGRAM. ADDING CASE REVIEWS.	\$25,840.00	\$25,840.00	2016	9/2/2016	1	SS00164C061	1	SMALL BUSINESS
DAVID BISCARDI PHD LTD	ME EXPRESS REPORTING - MENTAL HEALTH IGF::CT::IGF	\$25,819.99	\$25,819.99	2015	9/30/2015	2015	SS10631150014	0	SMALL BUSINESS
EAST BAY MUNICIPL UTILITY DISTR	FHFB - UTILITIES - WATER SERVICE. (PP = 11/1/15-10/31/16) TO PROVIDE WATER SERVICE FOR THE BUILDING, DRINKING FOUNTAINS AND FIRE SUPPRESSION AT FRANK HAGEL FEDERAL BUILDING.  IGF::CT::IGF	\$25,800.00	\$25,800.00	2016	10/8/2015	SS091651001		0	OTHER THAN SMALL BUSINESS
CYLUS CONSULTING PA	IGF::CL::IGF OMA MEDICAL CONSULTANTS. REVIEWS BY MEDICAL CONSULTANT OF DISABILITY CLAIM CASE FILES FOR AGENCY DISABILITY PROGRAM. ADDING 300 CASE REVIEWS.	\$25,800.00	\$25,800.00	2016	9/12/2016	1	SS00164C010	1	SMALL BUSINESS
M. S. MILLER, M.D., CONSULTANT LLC	IGF::CL::IGF OMA MEDICAL CONSULTANTS. REVIEWS BY MEDICAL CONSULTANT OF DISABILITY CLAIM CASE FILES FOR AGENCY DISABILITY PROGRAM. ADDING CASE REVIEWS.	\$25,800.00	\$25,800.00	2016	9/6/2016	1	SS00164C035	1	SMALL BUSINESS
PUBLIC HEALTH, ILLINOIS DEPARTMENT OF	IGF::OT::IGF OTHER FUNCTIONS ILLINOIS RECEIPT OF ELECTRONIC DEATH RECORDS (EDR) FOR OPTION YEAR III PERIOD OF PERFORMANCE JANUARY 1, 2015 - JANUARY 31, 2015.	\$25,762.42	\$25,762.42	2015	12/29/2014	4	SS001260036	0	OTHER THAN SMALL BUSINESS
VOCATIONAL CONSULTATION SERVICE INC	ME EXPRESS REPORTING - MENTAL HEALTH IGF::CT::IGF	\$25,716.80	\$25,716.80	2015	9/30/2015	2015	SS10631150209	0	SMALL BUSINESS
FARMATI MD, OSCAR	ME EXPRESS REPORTING - MENTAL HEALTH IGF::CT::IGF	\$25,660.00	\$25,660.00	2015	9/30/2015	2015	SS10541140148	0	SMALL BUSINESS
HERMAN MILLER, INC.	B167 KAPOLEI, HI - DESIGN, INSTALLATION AND PRODU	\$25,623.05	\$25,623.05	2015	5/13/2015	SS001530499	SS001260003	0	OTHER THAN SMALL BUSINESS
COHEN, JAMES S	VE EXPRESS REPORTING IGF::CT::IGF	\$25,535.00	\$25,535.00	2015	9/30/2015	2015	SS11501110085	0	SMALL BUSINESS
DEMAND TECHNOLOGY SOFTWARE, INC.	DEMAND TECHNOLOGY PERFORMANCE SENTRY	\$25,527.00	\$25,527.00	2017	10/27/2016	SS001750016		0	SMALL BUSINESS
DEMAND TECHNOLOGY SOFTWARE, INC.	MAINTAIN DEMAND TECHNOLOGY PERFORMANCE SENT	\$25,527.00	\$25,527.00	2016	10/6/2015	SS001650002		0	SMALL BUSINESS
CHATTAHOOCHEE VALLEY VOCATIONAL REHABILITATION SERVICES, INC	VE EXPRESS REPORTING IGF::CT::IGF	\$25,526.00	\$25,526.00	2015	9/30/2015	2015	SS10541140497	0	SMALL BUSINESS
CERTIFIED CAREER CONSULTANTS	VE EXPRESS REPORTING IGF::CT::IGF	\$25,452.00	\$25,452.00	2015	9/30/2015	2015	SS10881190195	0	SMALL BUSINESS
O T RESOURCES INC	VE EXPRESS REPORTING IGF::CT::IGF	\$25,421.00	\$25,421.00	2015	9/30/2015	2015	SS11511180087	0	SMALL BUSINESS
J & M COLE INVESTMENTS, INC.	ME EXPRESS REPORTING - MENTAL HEALTH IGF::CT::IGF	\$25,420.00	\$25,420.00	2015	9/30/2015	2015	SS10781160094	0	SMALL BUSINESS
JACKLYN A BENSON-DEHAAN AND ASSOCIATES	VE EXPRESS REPORTING IGF::CT::IGF	\$25,309.00	\$25,309.00	2015	9/30/2015	2015	SS10881390001	0	SMALL BUSINESS
MICROPACT, INC.	RENEWAL OF SS00-15-50261 FOR MAINTENANCE ON MI	\$25,299.57	\$25,299.57	2016	7/21/2016	SS001650185		0	OTHER THAN SMALL BUSINESS
YARED, THOMAS A MD	IGF::CL::IGF REGION 2 MEDICAL CONSULTANTS. REVIEWS BY MEDICAL CONSULTANT OF DISABILITY CLAIM CASE FILES FOR AGENCY DISABILITY PROGRAM.	\$25,266.20	\$25,266.20	2016	2/25/2016	1	SS02164C023	0	SMALL BUSINESS
PAUL E GORMLEY MD	IGF::CL::IGF OMA MEDICAL CONSULTANTS. REVIEWS BY MEDICAL CONSULTANT OF DISABILITY CLAIM CASE FILES FOR AGENCY DISABILITY PROGRAM.	\$25,250.00	\$25,250.00	2016	5/31/2016	1	SS00164C019	0	SMALL BUSINESS
PAZ, ANNETTE DE	IGF::CL::IGF REGION 2 MEDICAL CONSULTANTS. REVIEWS BY MEDICAL CONSULTANT OF DISABILITY CLAIM CASE FILES FOR AGENCY DISABILITY PROGRAM.	\$25,235.00	\$25,235.00	2015	4/6/2015	2	SS021440024	0	SMALL BUSINESS
CLIFFORD MD, SUSAN	IGF::CL::IGF REGIONAL MEDICAL CONSULTANT SERVICES - REVIEWS BY MEDICAL CONSULTANT OF DISABILITY CLAIM CASE FILES FOR AGENCY DISABILITY PROGRAM.	\$25,212.00	\$25,212.00	2016	5/24/2016	1	SS06164C007	0	SMALL BUSINESS

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Vendor Name	Description of Requirement	Action Obligation	Base and All Options Value	Fiscal Year	Date Signed	PO/Delivery Order/Task Order/Call#	Parent Contract	Mod #	Contracting Officers Business Size Selection
GONZALEZ, JOSE	INDEPENDENT CASE REVIEWS BY MEDICAL CONSULTANT OF DISABILITY CLAIM CASE FILES FOR AGENCY DISABILITY PROGRAM. IGF::CL::IGF	\$25,200.00	\$25,200.00	2016	4/11/2016	5	SS021240008	0	SMALL BUSINESS
HOLAN, KEITH MD	ME EXPRESS REPORTING - MENTAL HEALTH IGF::CT::IGF	\$25,180.00	\$25,180.00	2015	9/30/2015	2015	SS10631150264	0	SMALL BUSINESS
BENTON CONSULTING, LLC	ME EXPRESS REPORTING - MENTAL HEALTH IGF::CT::IGF	\$25,136.00	\$25,136.00	2015	9/30/2015	2015	SS10631150131	0	SMALL BUSINESS
RICHARDS, MARK	VE EXPRESS REPORTING IGF::CT::IGF	\$25,053.00	\$25,053.00	2015	9/30/2015	2015	SS10631150021	0	SMALL BUSINESS
HULLENDER COUNSELING SERVICES	VE EXPRESS REPORTING IGF::CT::IGF	\$25,033.00	\$25,033.00	2015	9/30/2015	2015	SS10691470008	0	SMALL BUSINESS
DPC CONSULTING LLC	IGF::CL::IGF MODIFICATION TO ADD CASES AND EXTEND IGF::OT::IGF	\$25,020.00	\$25,020.00	2016	6/23/2016	4	SS041540002	1	SMALL BUSINESS
GALLAGHER BENEFIT SERVICES, INC.	PURCHASE ORDER FOR RENEWAL OF ELECTRONIC SUBSCRIPTION ENTITLED, GVISOR.  PREVIOUSLY PURCHASED UNDER SS00-12-50086.	\$25,000.00	\$25,000.00	2016	12/23/2015	SS001550050		1	OTHER THAN SMALL BUSINESS
PUBLIC HEALTH, MASSACHUSETTS DEPT OF	IGF::OT::IGF OTHER FUNCTIONS  THIS MODIFICATION ADDS FUNDING FOR 8,090 MORE ELECTRONIC DEATH RECORDS RECEIVED THAN ORIGINALLY ESTIMATED.	\$24,998.10	\$24,998.10	2016	11/24/2015	4	SS001260053	1	OTHER THAN SMALL BUSINESS
ELVA J. MONTOYA, M.D., P.A.	IGF::CL::IGF MONTOYA - CALL ORDER - CASES	\$24,964.50	\$24,964.50	2015	4/8/2015	12	SS061140017	0	SMALL BUSINESS
SEBA PROFESSIONAL SERVICES LLC	REGION 05 MEDICAL ADVISOR. REVIEWS BY MEDICAL CONSULTANT OF DISABILITY CLAIM CASE FILES FOR AGENCY DISABILITY PROGRAM. NEW CALL ORDER FOR INDEPENDENT CASE REVIEWS. IGF::CL::IGF	\$24,920.00	\$24,920.00	2016	9/26/2016	2	SS05154C000	0	SMALL BUSINESS
M A & ASSOCIATES	IGF::CL::IGF  REGION 9 MEDICAL CONSULTANTS. REVIEWS BY MEDICAL CONSULTANT OF DISABILITY CLAIM CASE FILES FOR AGENCY DISABILITY PROGRAM. CALL ORDER TO AWARD PATTI SOLOMON-RICE 264 CASES AND 30 NON-CASE HOURS.	\$24,916.50	\$24,916.50	2016	2/29/2016	1	SS09164C054	0	SMALL BUSINESS
COOKE, CHARLES L MD	ME EXPRESS REPORTING - MENTAL HEALTH IGF::CT::IGF	\$24,900.00	\$24,900.00	2015	9/30/2015	2015	SS10381130094	0	SMALL BUSINESS
CHRISTOPHER SALVO	VE EXPRESS REPORTING IGF::CT::IGF	\$24,841.00	\$24,841.00	2015	9/30/2015	2015	SS10881190271	0	SMALL BUSINESS
JACQUELINE FARWELL	MEDICAL CONSULTANT REG 10 FARWELL IGF::CL::IGF CLOSELY ASSOCIATED ADDITION OF INDEPENDENT CASE REVIEWS	\$24,834.40	\$24,834.40	2017	11/14/2016	4	SS10154C006	0	SMALL BUSINESS
GREEN CONTRACTING COMPANY, INC.	INSTALL LINE STOP ON WATER MAIN IN ACCORDANCE WITH THE ATTACHED STATEMENT OF WORK  IGF::OT::IGF	\$24,800.00	\$24,800.00	2016	8/12/2016	SS001650221		0	OTHER THAN SMALL BUSINESS
GARY WEIMHOLT CONSULTING & REHABILITATION SERVICES, INC	VE EXPRESS REPORTING IGF::CT::IGF	\$24,760.00	\$24,760.00	2015	9/30/2015	2015	SS10691170013	0	SMALL BUSINESS
KAREN HARRISON	VE EXPRESS REPORTING IGF::CT::IGF	\$24,736.00	\$24,736.00	2015	9/30/2015	2015	SS10781160131	0	SMALL BUSINESS
PUBLIC HEALTH, CALIFORNIA DEPARTMENT OF	ELECTRONIC DEATH REGISTRATION - CALIFORNIA THE PURPOSE OF MODIFICATION NUMBER 4 IS TO EXERCISE OPTION YEAR THREE TO EXTEND THE TERM OF THE CONTRACT FROM JANUARY 1, 2015 THROUGH DECEMBER 31, 2015 FOR RECEIPT OF ELECTRONIC DEATH RECORDS.	\$0.00	\$24,720.00	2015	12/11/2014	SS001260007		4	OTHER THAN SMALL BUSINESS
BARTMANN AND ASSOCIATES, LLC	VE EXPRESS REPORTING IGF::CT::IGF	\$24,703.00	\$24,703.00	2015	9/30/2015	2015	SS11511180091	0	SMALL BUSINESS
LIPETZ, PSY. D, BRUCE D	IGF::CL::IGF CLOSELY ASSOCIATED - REGIONAL MEDICA	\$24,700.00	\$24,700.00	2016	2/18/2016	1	SS08164C014	1	SMALL BUSINESS
CALLINS, W PAUL MD	MEDICAL CONSULTANT SERVICES - PHYSICAL CASES CLOSELY ASSOCIATED TO INHERENTLY GOVERNMENTAL FUNCTION IGF::CL::IGF	\$24,603.00	\$24,603.00	2015	6/11/2015	16	SS041040093	2	SMALL BUSINESS

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Vendor Name	Description of Requirement	Action Obligation	Base and All Options Value	Fiscal Year	Date Signed	PO/Delivery Order/Task Order/Call#	Parent Contract	Mod #	Contracting Officers Business Size Selection
HARPER, JOHN T	MEDICAL CONSULTANT SERVICES - PHYSICAL CASES CLOSELY ASSOCIATED TO INHERENTLY GOVERNMENTAL FUNCTION IGF::CL::IGF	\$24,603.00	\$24,603.00	2015	4/13/2015	11	SS041140051	1	SMALL BUSINESS
HUMPHREYS, JOHN L.	MEDICAL CONSULTANT SERVICES - PHYSICAL CASES CLOSELY ASSOCIATED TO INHERENTLY GOVERNMENTAL FUNCTION IGF::CL::IGF	\$24,603.00	\$24,603.00	2015	7/7/2015	16	SS041140048	0	SMALL BUSINESS
MAUREEN DINGES DR	MEDICAL CONSULTANT SERVICES - PHYSICAL MED SPEECH/LANGUAGE IGF::CL::IGF	\$24,603.00	\$24,603.00	2015	6/25/2015	20	SS041140057	1	SMALL BUSINESS
GAIR, CELINE PAYNE PHD	MEDICAL CONTRACTOR SERVICES - MENTAL CASES CLOSELY ASSOCIATED TO INHERENTLY GOVERNMENTAL FUNCTION IGF::CL::IGF	\$24,603.00	\$24,603.00	2015	12/16/2014	15	SS041040091	0	SMALL BUSINESS
H. RUDOLPH WARREN, M.D., P.C.	MEDICAL CONTRACTOR SERVICES - MENTAL CASES CLOSELY ASSOCIATED TO INHERENTLY GOVERNMENTAL FUNCTION IGF::CL::IGF	\$24,603.00	\$24,603.00	2016	11/13/2015	14	SS041140062	0	SMALL BUSINESS
HAROLD E RAMSEY MD	DR. RAMSEY MODIFICATION TO ADD CASES SS00-11-40052 IGF::CT::IGF	\$24,600.00	\$24,600.00	2015	1/13/2015	5	SS001140052	0	SMALL BUSINESS
THE AXON GROUP	IGF::CL::IGF REGION 2 MEDICAL CONSULTANTS. REVIEWS BY MEDICAL CONSULTANT OF DISABILITY CLAIM CASE FILES DISABILITY PROGRAM.INCREASE QUANTITY CASE REVIEWS AND EXTEND PERIOD OF PERFORMANCE.	\$24,600.00	\$24,600.00	2016	6/22/2016	6	SS021240003	1	SMALL BUSINESS
CHAHAL, RAMAN GILL MD	MEDICAL CONSULTANT CONTRACTORS BLANKET PURCHASE AGREEMENT IGF::CL::IGF	\$24,600.00	\$24,600.00	2016	12/21/2015	6	SS001140127	1	SMALL BUSINESS
HERBERT L BLUMENFIELD MD	MEDICAL CONSULTANT CONTRACTORS BLANKET PURCHASE AGREEMENT IGF::CL::IGF	\$24,600.00	\$24,600.00	2015	1/28/2015	6	SS001140132	0	SMALL BUSINESS
KLEIR, GAIL	ME EXPRESS REPORTING - MENTAL HEALTH IGF::CT::IGF	\$24,570.00	\$24,570.00	2015	9/30/2015	2015	SS10631150149	0	SMALL BUSINESS
PERRY, KARYN B	VE EXPRESS REPORTING IGF::CT::IGF	\$24,550.00	\$24,550.00	2015	9/30/2015	2015	SS10691170012	0	SMALL BUSINESS
BRUCE, JAMES R PHD	VE EXPRESS REPORTING IGF::CT::IGF	\$24,440.00	\$24,440.00	2015	9/30/2015	2015	SS11511180018	0	SMALL BUSINESS
ROBERT STARACE DR	IGF::CL::IGF REGION 2 MEDICAL CONSULTANTS. REVIEWS BY MEDICAL CONSULTANT OF DISABILITY CLAIM CASE FILES FOR AGENCY DISABILITY PROGRAM.	\$24,437.80	\$24,437.80	2016	2/3/2016	1	SS02164C021	0	SMALL BUSINESS
PERLL, DR MICHAEL	IGF::CL::IGF CLOSELY ASSOCIATED - REGIONAL MEDICA	\$24,420.00	\$24,420.00	2016	2/29/2016	1	SS07164C019	0	SMALL BUSINESS
PERLL, DR MICHAEL	IGF::CL::IGF CLOSELY ASSOCIATED - CALL ORDER FOR II	\$24,420.00	\$24,420.00	2016	8/23/2016	2	SS07164C019	0	SMALL BUSINESS
MARCIA FOSTER	IGF::CL::IGF CLOSELY ASSOCIATED - REGIONAL MEDICA	\$24,420.00	\$24,420.00	2016	4/19/2016	1	SS07164C005	0	SMALL BUSINESS
BEST VOCATIONAL CONSULTANTS INC	VE EXPRESS REPORTING IGF::CT::IGF	\$24,410.00	\$24,410.00	2015	9/30/2015	2015	SS11511180081	0	SMALL BUSINESS
PUBLIC HEALTH, CALIFORNIA DEPARTMENT OF	IGF::OT::IGF OTHER FUNCTIONS CA EXERCISE OPTION YEAR 1 ENUMERATION AT BIRTH EAB THE CONTRACTOR SHALL PROVIDE BIRTH RECORDS FOR THE PURPOSE OF OBTAINING SOCIAL SECURITY NUMBER SSN AT BIRTH IN ACCORDANCE WITH THE ATTACHED STATEMENT OF WORK.	\$2,237,921.96	\$24,391.52	2015	5/21/2015	SS001461044		1	OTHER THAN SMALL BUSINESS



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CARMEN FRATTO MD	IGF::CL::IGF OMA MEDICAL CONSULTANTS. REVIEWS BY MEDICAL CONSULTANT OF DISABILITY CLAIM CASE FILES FOR AGENCY DISABILITY PROGRAM.	\$24,375.00	\$24,375.00	2016	5/31/2016	1	SS00164C016	0	SMALL BUSINESS
ARTHUR L LEWY	IGF::CL::IGF LEWY, MC, REG. 10 ADDITION OF INDEPENDENT CASE REVIEWS AND EXTENSION OF POP	\$24,204.00	\$24,204.00	2016	12/21/2015	1	SS10154C007	2	SMALL BUSINESS
MSDSPRO, LLC	IGF::CT::IGF MATERIAL SAFETY DATA SHEETS SUBSCRIPTION.	\$24,180.00	\$24,180.00	2016	7/14/2016	SS001650183		0	OTHER THAN SMALL BUSINESS
SOUTH DAKOTA, STATE OF	IGF::CL::IGF CLOSELY ASSOCIATED SD SS00-12-60055 ELECTRONIC DEATH REGISTRATION DELIVERY ORDER. 8,700 EDR RECORDS TOTAL DELIVERY ORDER \$24,142.50. PERIOD OF PERFORMANCE 1/01/2016 - 12/31/2016.	\$24,142.50	\$24,142.50	2016	12/22/2015	5	SS001260055	0	OTHER THAN SMALL BUSINESS
TOMMY NOBIS ENTERPRISES, INC.	ICHR FILE CLERK SERVICES	\$24,139.14	\$24,139.14	2015	8/26/2015	SS041160000		10	OTHER THAN SMALL BUSINESS
TOMMY NOBIS ENTERPRISES, INC.	ICHR FILE CLERK SERVICES	\$24,139.14	\$24,139.14	2016	12/17/2015	SS041160000		11	OTHER THAN SMALL BUSINESS
RESOURCE DESIGNS	VE EXPRESS REPORTING IGF::CT::IGF	\$24,138.96	\$24,138.96	2015	9/30/2015	2015	SS10541140363	0	SMALL BUSINESS
ALKA BISHNOI MD	IGF::CL::IGF REGION 2 MEDICAL CONSULTANTS. REVIEWS BY MEDICAL CONSULTANT OF DISABILITY CLAIM CASE FILES FOR AGENCY DISABILITY PROGRAM. MODIFICATION TO ADD CASES AND EXTEND PERFORMANCE.	\$24,126.00	\$24,126.00	2015	6/2/2015	7	SS021140001	2	SMALL BUSINESS
ZWI KAHANOWICZ MD	IGF::CL::IGF REGION 2 MEDICAL CONSULTANTS. REVIEWS BY MEDICAL CONSULTANT OF DISABILITY CLAIM CASE FILES FOR AGENCY DISABILITY PROGRAM. MODIFICATION TO INCREASE QUANTITY AND EXTEND PERFORMANCE.	\$24,126.00	\$24,126.00	2015	12/11/2014	7	SS021140088	2	SMALL BUSINESS
SZ THERAPIES	IGF::CL::IGF CLOSELY ASSOCIATED - REGIONAL MEDICAL CONSULTANT SERVICES - INITIAL ORIENTATION	\$24,000.00	\$24,000.00	2016	4/14/2016	2	SS08164C024	0	SMALL BUSINESS
PIRKLE JR, QUENTIN ROOSEVELT	IGF::CL::IGF	\$24,000.00	\$24,000.00	2015	1/12/2015	1	SS041540001	0	SMALL BUSINESS
CARASOFT TECHNOLOGY CORP.	TO PURCHASE 3 MONTHS OF MAINTENANCE FOR HP EDI	\$23,993.11	\$23,993.11	2016	6/23/2016	SS001650164		0	OTHER THAN SMALL BUSINESS
HAUER, ALLEN PHD	ME EXPRESS REPORTING - MENTAL HEALTH IGF::CT::IGF	\$23,952.79	\$23,952.79	2015	9/30/2015	2015	SS10631150074	0	SMALL BUSINESS
ARTHUR H BRIGGS	VE EXPRESS REPORTING IGF::CT::IGF	\$23,840.00	\$23,840.00	2015	9/30/2015	2015	SS10781160020	0	OTHER THAN SMALL BUSINESS
MEGERIAN, JONATHAN DR	ME EXPRESS REPORTING - MENTAL HEALTH IGF::CT::IGF	\$23,830.00	\$23,830.00	2015	9/30/2015	2015	SS11501110066	0	SMALL BUSINESS
SLIVE, DONALD	VE EXPRESS REPORTING IGF::CT::IGF	\$23,793.00	\$23,793.00	2015	9/30/2015	2015	SS10251120059	0	SMALL BUSINESS
RUTH ANN LYMAN, PH.D., LLC	MEDICAL CONTRACTOR SERVICES - PYSCHOLOGY IGF::CL::IGF	\$23,782.90	\$23,782.90	2015	12/15/2014	14	SS041140024	0	SMALL BUSINESS
GETTY IMAGES (US), INC	IGF::OT::IGF ONE-YEAR (1) SUBSCRIPTION TO ISTOCK SIG	\$23,758.00	\$23,758.00	2016	5/4/2016	SS001650121		0	OTHER THAN SMALL BUSINESS
HENSEL PHELPS SERVICES LLC	IGF::CT::IGF	\$23,749.00	\$23,749.00	2016	2/11/2016	SS001630177	SS001461106	0	OTHER THAN SMALL BUSINESS
MAPLEWOOD PSYCHOLOGICAL ASSOCIATES	REGIONAL MEDICAL CONSULTANT- ROTMAN, ELLIOTT - INDEPENDENT CASE REVIEWS IGF::CL::IGF	\$23,700.00	\$23,700.00	2016	4/26/2016	2	SS03154C005	0	SMALL BUSINESS
WORK REHABILITATIONS CONSULTANT	VE EXPRESS REPORTING IGF::CT::IGF	\$23,686.00	\$23,686.00	2015	9/30/2015	2015	SS11511180089	0	SMALL BUSINESS
WARREN HAAGENSON	VE EXPRESS REPORTING IGF::CT::IGF	\$23,632.00	\$23,632.00	2015	9/30/2015	2015	SS11511180057	0	SMALL BUSINESS
HERMAN MILLER, INC.	KISSIMMEE, FL AA16 DESIGN, INSTALLATION AND PRODU	\$23,613.99	\$23,613.99	2015	3/27/2015	SS001530349	SS001260003	0	OTHER THAN SMALL BUSINESS
EXECUTIVE OFFICE OF THE GOVERNOR OF DELAWARE	IGF::CL::IGF CLOSELY ASSOCIATED DE DELIVERY ORDER FOR RECEIPT OF ELECTRONIC DEATH RECORDS. 8,500 RECORDS. TOTAL \$23,587.50. PERIOD OF PERFORMANCE 01/01/2016 - 12/31/2016.	\$23,587.50	\$23,587.50	2016	12/22/2015	5	SS001260018	0	OTHER THAN SMALL BUSINESS

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Vendor Name	Description of Requirement	Action Obligation	Base and All Options Value	Fiscal Year	Date Signed	PO/Delivery Order/Task Order/Call#	Parent Contract	Mod #	Contracting Officers Business Size Selection
SUSMAN, MORRIS H	IGF::CL::IGF CLOSELY ASSOCIATED - REGIONAL MEDICAL CONTRACTOR SERVICES FOR REGION 8 - SPECIALTY - ORTHOPEDIST								
	CLOSELY ASSOCIATED - REGIONAL MEDICAL CONTRACTOR SERVICES FOR	\$23,560.00	\$23,560.00	2016	2/18/2016	1	SS08164C022	1	SMALL BUSINESS
METCALF, CHARLES W	ME EXPRESS REPORTING - MENTAL HEALTH IGF::CT::IGF	\$23,560.00	\$23,560.00	2015	9/30/2015	2015	SS10631150258	0	SMALL BUSINESS
SOUTH DAKOTA, STATE OF	IGF::OT::IGF OTHER FUNCTIONS SD RECEIPT OF ELECTRONIC DEATH RECORDS FOR OPTION YEAR III PERIOD OF PERFORMANCE JANUARY 1, 2015 - DECEMBER 31, 2015.	\$23,533.50	\$23,533.50	2015	12/22/2014	4	SS001260055	0	OTHER THAN SMALL BUSINESS
M A & ASSOCIATES	IGF::CL::IGF MODIFICATION TO ADD CASES AND EXTEND	\$23,518.80	\$23,518.80	2016	7/29/2016	1	SS09164C054	1	SMALL BUSINESS
HERMAN MILLER, INC.	ELIZABETHTOWN, KY #C449, INSTALLER HOURS AND PRO	\$23,490.84	\$23,490.84	2016	7/18/2016	SS001630556	SS001260003	0	OTHER THAN SMALL BUSINESS
YOSHIOKA, JO ANN	VE EXPRESS REPORTING IGF::CT::IGF	\$23,475.00	\$23,475.00	2015	9/30/2015	2015	SS10881190275	0	SMALL BUSINESS
MITCHELL THOMAS M	VE EXPRESS REPORTING IGF::CT::IGF	\$23,463.00	\$23,463.00	2015	9/30/2015	2015	SS10881190101	0	SMALL BUSINESS
TERRY VANDER-MOLEN	VE EXPRESS REPORTING IGF::CT::IGF	\$23,421.70	\$23,421.70	2015	9/30/2015	2015	SS10781160155	0	SMALL BUSINESS
BAILEY, JOSELYN M D A MEDICAL CORPORATION	ME EXPRESS REPORTING - MENTAL HEALTH IGF::CT::IGF	\$23,380.00	\$23,380.00	2015	9/30/2015	2015	SS10881190114	0	SMALL BUSINESS
ANCELL, JO G	VE EXPRESS REPORTING IGF::CT::IGF	\$23,359.00	\$23,359.00	2015	9/30/2015	2015	SS10631450015	0	SMALL BUSINESS
COMPUTER MANAGEMENT SCIENCES INC	MAINTAIN COMPUTER MANAGEMENT SCIENCES CPEXP	\$0.00	\$23,333.34	2016	11/19/2015	SS001651006		1	OTHER THAN SMALL BUSINESS
CECILE M JOHNSON	VE EXPRESS REPORTING IGF::CT::IGF	\$23,249.64	\$23,249.64	2015	9/30/2015	2015	SS10781160019	0	SMALL BUSINESS
PATEL, SHITAL	IGF::CL::IGF RMC TO CONDUCT INDEPENDENT CASE REVIEWS. REVIEWS BY MEDICAL CONSULTANT OF DISABILITY CLAIM CASE FILES FOR AGENCY DISABILITY PROGRESS.	\$23,100.00	\$23,100.00	2016	7/15/2016	2	SS03154C002	0	SMALL BUSINESS
HERMAN MILLER, INC.	LAKEPORT, CA #AA32 - INSTALLATION AND PRODUCT ES	\$23,093.70	\$23,093.70	2015	6/23/2015	SS001530651	SS001260003	0	OTHER THAN SMALL BUSINESS
EXECUTIVE OFFICE OF THE GOVERNOR OF DELAWARE	IGF::OT::IGF OTHER FUNCTIONS DELAWARE RECEIPT OF ELECTRONIC DEATH RECORDS FOR OPTION YEAR III PERIOD OF PERFORMANCE JANUARY 1, 2015 - DECEMBER 31 2015.	\$22,992.50	\$22,992.50	2015	12/22/2014	4	SS001260018	0	OTHER THAN SMALL BUSINESS
BECK, ROBERT	VE EXPRESS REPORTING IGF::CT::IGF	\$22,990.00	\$22,990.00	2015	9/30/2015	2015	SS10631150012	0	SMALL BUSINESS
DAVID HUNTLEY MD	VE EXPRESS REPORTING IGF::CT::IGF	\$22,980.00	\$22,980.00	2015	9/30/2015	2015	SS10881190074	0	SMALL BUSINESS
O'BRIEN, DEREK J MD	MEDICAL CONSULTANT SERVICES - MENTAL CASES CLOSELY ASSOCIATED TO INHERENTLY GOVERNMENTAL FUNCTION IGF::CL::IGF	\$22,962.80	\$22,962.80	2015	3/30/2015	15	SS041040088	1	SMALL BUSINESS
UPCHURCH, JAMES C	IGF::CL::IGF REQUEST FOR NEW CALL ORDER FOR JAMES UPCHURCH, MD	\$22,898.70	\$22,898.70	2017	11/7/2016	3	SS04164C024	0	SMALL BUSINESS
BLAKE, WAYNE M PH D	VE EXPRESS REPORTING IGF::CT::IGF	\$22,875.48	\$22,875.48	2015	9/30/2015	2015	SS10541240005	0	SMALL BUSINESS
MOSELEY VOCATIONAL CONSULTING LLC	VE EXPRESS REPORTING IGF::CT::IGF	\$22,859.87	\$22,859.87	2015	9/30/2015	2015	SS10541440007	0	SMALL BUSINESS
JOSE J RABELO MD	IGF::CL::IGF REGION 2 MEDICAL CONSULTANTS. REVIEWS BY MEDICAL CONSULTANT OF DISABILITY CLAIM CASE FILES FOR AGENCY DISABILITY PROGRAM. MODIFICATION TO INCREASE QUANTITY.	\$22,853.60	\$22,853.60	2016	12/17/2015	15	SS021140104	2	SMALL BUSINESS
BARNES, LAVERNE MONISE	IGF::CL::IGF REGIONAL MEDICAL CONSULTANT SERVICES FOR THE SOCIAL SECURITY ADMINISTRATION. REVIEWS BY MEDICAL CONSULTANT OF DISABILITY CLAIM CASE FILES FOR AGENCY DISABILITY PROGRAM. MODIFICATION TO ADD CASES	\$22,810.00	\$22,810.00	2016	5/13/2016	1	SS05164C002	1	SMALL BUSINESS
CAROLE ROSANOVA MD	MEDICAL CONSULTANT SERVICES DR. CAROLE ROSANOVE IGF::CL::IGF	\$22,810.00	\$22,810.00	2016	3/15/2016	1	SS05164C035	0	SMALL BUSINESS

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KATHLEEN O'BRIEN	MEDICAL SERVICE CONSULTANT DR. KATHLEEN O'BRIEN IGF::CL::IGF	\$22,810.00	\$22,810.00	2016	3/14/2016	2	SS05154C008	0	SMALL BUSINESS
THOMAS MAYEDA	IGF::CL::IGF CLOSELY ASSOCIATED - CALL ORDER FOR H	\$22,800.00	\$22,800.00	2016	7/15/2016	2	SS08164C017	0	SMALL BUSINESS
DRS MARTINEZ & MARTINEZ PC	IGF::CL::IGF CLOSELY ASSOCIATED - CALL ORDER FOR INDEPENDENT CASE REVIEWS FOR REGIONAL MEDICAL CONTRACTOR SERVICES FOR REGION 8 FOR THE SOCIAL SECURITY ADMINISTRATION. REVIEWS BY MEDICAL CONSULTANT OF DISABILITY CLAIM CASE FILES FOR AGENCY DISABILITY PROGRAM. SPECIALTY - PSYCHOLOGIST -	\$22,800.00	\$22,800.00	2016	8/30/2016	2	SS08164C016	0	SMALL BUSINESS
BERKOWITZ, MARK PSY D	IGF::CL::IGF CLOSELY ASSOCIATED - REGIONAL MEDICA	\$22,800.00	\$22,800.00	2016	2/18/2016	2	SS08164C001	1	SMALL BUSINESS
LEARNING FROM THE JOURNEY INC	IGF::CL::IGF CLOSELY ASSOCIATED - NEW CALL ORDER F	\$22,800.00	\$22,800.00	2016	12/22/2015	1	SS08164C013	0	SMALL BUSINESS
YAMAMOTO MD, FRANCIS K	IGF::CL::IGF CLOSELY ASSOCIATED NEW CALL ORDER FO	\$22,800.00	\$22,800.00	2016	12/29/2015	1	SS08164C026	0	SMALL BUSINESS
COMESS, LEONARD J	IGF::CL::IGF REGIONAL MEDICAL CONSULTANT SERVICES FOR THE SOCIAL SECURITY ADMINISTRATION. REVIEWS BY MEDICAL CONSULTANT OF DISABILITY CLAIM CASE FILES FOR AGENCY DISABILITY PROGRAM. INCREASING CASE QUANTITY.	\$22,781.00	\$22,781.00	2016	4/1/2016	1	SS02164C006	1	SMALL BUSINESS
AUDIMATION SERVICES INC	AUDIMATION CASEWARE IDEA SOFTWARE MAINTENANC	\$22,750.00	\$22,750.00	2016	1/12/2016	SS001650056		0	SMALL BUSINESS
BARNES, FRANK L	ME EXPRESS REPORTING - MENTAL HEALTH IGF::CT::IGF	\$22,750.00	\$22,750.00	2015	9/30/2015	2015	SS10781160102	0	OTHER THAN SMALL BUSINESS
AUDIMATION SERVICES INC	RENEWAL OF SS00-14-51070 MAINTENANCE OF IDEA SW	\$22,750.00	\$22,750.00	2015	1/15/2015	SS001550066		0	OTHER THAN SMALL BUSINESS
OWENS, DAVID E	ME EXPRESS REPORTING - MENTAL HEALTH IGF::CT::IGF	\$22,740.00	\$22,740.00	2015	9/30/2015	2015	SS10381130080	0	SMALL BUSINESS
MOORE, YONDELL	IGF::CL::IGF MOORE, Y. - CALL ORDER - CASES	\$22,695.00	\$22,695.00	2015	4/8/2015	13	SS061140019	0	SMALL BUSINESS
GOLDBERG, GAIL	IGF::CL::IGF OMA MEDICAL CONSULTANTS. REVIEWS BY MEDICAL CONSULTANT OF DISABILITY CLAIM CASE FILES FOR AGENCY DISABILITY PROGRAM.	\$22,650.00	\$22,650.00	2016	5/31/2016	1	SS00164C017	0	SMALL BUSINESS
MCCAFFERY, PATRICK G.	ME EXPRESS REPORTING - MENTAL HEALTH IGF::CT::IGF	\$22,650.00	\$22,650.00	2015	9/30/2015	2015	SS10881190022	0	SMALL BUSINESS
LERNER, HANK S	VE EXPRESS REPORTING IGF::CT::IGF	\$22,647.00	\$22,647.00	2015	9/30/2015	2015	SS11501110035	0	SMALL BUSINESS
AXLINE, JOHN W MD	ME EXPRESS REPORTING - MENTAL HEALTH IGF::CT::IGF	\$22,630.00	\$22,630.00	2015	9/30/2015	2015	SS11501110008	0	SMALL BUSINESS
PELZER, SUSAN G	ME EXPRESS REPORTING - MENTAL HEALTH IGF::CT::IGF	\$22,630.00	\$22,630.00	2015	9/30/2015	2015	SS10781360010	0	SMALL BUSINESS
SHAPIRO, HOWARD S., M.D.	ME EXPRESS REPORTING - MENTAL HEALTH IGF::CT::IGF	\$22,630.00	\$22,630.00	2015	9/30/2015	2015	SS10631350010	0	SMALL BUSINESS
SUHONOS, LISA	VE EXPRESS REPORTING IGF::CT::IGF	\$22,603.00	\$22,603.00	2015	9/30/2015	2015	SS10881190287	0	OTHER THAN SMALL BUSINESS
HERMAN MILLER, INC.	SUMTER, SC A595 DESIGN, PRODUCT AND INSTALLATION	\$22,591.70	\$22,591.70	2016	4/7/2016	SS001630289	SS001260003	0	OTHER THAN SMALL BUSINESS
HAMERSMA PHD, RICHARD	ME EXPRESS REPORTING - MENTAL HEALTH IGF::CT::IGF	\$22,443.00	\$22,443.00	2015	9/30/2015	2015	SS10631150105	0	SMALL BUSINESS
GRAVE DERMA CARE P C	IGF::CL::IGF REGIONAL MEDICAL CONSULTANT SERVICES - REVIEWS BY MEDICAL CONSULTANT OF DISABILITY CLAIM CASE FILES FOR AGENCY DISABILITY PROGRAM.	\$22,440.00	\$22,440.00	2016	7/25/2016	2	SS03154C025	0	SMALL BUSINESS
NERO INC	RENEWAL ON NERO 9 SOFTWARE LICENSE MAINTENANC	\$86,321.09	\$22,421.09	2016	10/19/2015	SS001560003		1	SMALL BUSINESS
JAMES E WALLACE REHABILITATION COUNSELOR & CONSULTANT	VE EXPRESS REPORTING IGF::CT::IGF	\$22,419.00	\$22,419.00	2015	9/30/2015	2015	SS10781160225	0	SMALL BUSINESS
DAVID C PERRY	VE EXPRESS REPORTING IGF::CT::IGF	\$22,354.00	\$22,354.00	2015	9/30/2015	2015	SS11511180075	0	SMALL BUSINESS
HERMAN MILLER, INC.	DALLAS, TEXAS # SB86 SYSTEMS FURNITURE - 2ND FLOO	\$22,304.94	\$22,304.94	2015	5/29/2015	SS001530550	SS001260003	0	OTHER THAN SMALL BUSINESS
JANIKOWSKI, TIMOTHY	VE EXPRESS REPORTING IGF::CT::IGF	\$22,301.00	\$22,301.00	2015	9/30/2015	2015	SS10251120061	0	SMALL BUSINESS
VIRDEN, KATRINA	VE EXPRESS REPORTING IGF::CT::IGF	\$22,291.04	\$22,291.04	2015	9/30/2015	2015	SS10781160071	0	SMALL BUSINESS
DIXIE MOORE PHD	ME EXPRESS REPORTING - MENTAL HEALTH IGF::CT::IGF	\$22,210.00	\$22,210.00	2015	9/30/2015	2015	SS10541140130	0	SMALL BUSINESS
PUBLIC HEALTH, CALIFORNIA DEPARTMENT OF	ELECTRONIC DEATH REGISTRATION CALIFORNIA THE PURPOSE OF MODIFICATION NUMBER 5 IS TO EXERCISE OPTION YEAR IV TO EXTEND THE TERM OF THE CONTRACT FROM JANUARY 1, 2016 THROUGH DECEMBER 31, 2016 FOR RECEIPT OF ELECTRONIC DEATH RECORDS.	\$0.00	\$22,200.00	2016	12/30/2015	SS001260007		5	OTHER THAN SMALL BUSINESS
INTERGRAL INFORMATION SOLUTIONS GMBH	RENEWAL MAINTENANCE ON FUSIONREACTOR SOFTWA	\$22,157.00	\$22,157.00	2015	4/1/2015	SS001550097		0	SMALL BUSINESS

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M-TECH MECHANICAL, LLC	IGF::CT::IGF  MECHANICAL SHAFT SEAL REPLACEMENT - EMERGENCY REPAIRS; YORK 1200 TON YK CENTRIFUGAL CHILLER #3, LOCATED AT THE SSA, ALTMeyer BUILDING.	\$22,132.00	\$22,132.00	2016	2/3/2016	SS001650061			0 SMALL BUSINESS
JOSEPH COOLS	ME EXPRESS REPORTING - MENTAL HEALTH IGF::CT::IGF	\$22,130.00	\$22,130.00	2015	9/30/2015	2015	SS10631150040		0 SMALL BUSINESS
PHILLIPS, MICHAEL M	ME EXPRESS REPORTING - MENTAL HEALTH IGF::CT::IGF	\$22,100.00	\$22,100.00	2015	9/30/2015	2015	SS10111100031		0 SMALL BUSINESS
NATIONAL VOCATIONAL EXPERT	ME EXPRESS REPORTING - MENTAL HEALTH IGF::CT::IGF	\$22,049.00	\$22,049.00	2015	9/30/2015	2015	SS10631150369		0 SMALL BUSINESS
HAYNE JR, VAN B.	IGF::CL::IGF MODIFICATION TO ADD CONSULTING HOUR	\$22,040.00	\$22,040.00	2016	8/19/2016		1 SS04164C060	1	SMALL BUSINESS
HEALTH AND HUMAN RESOURCES, WEST VIRGINIA DEPARTMENT OF BRIDGERLAND COUNSELING, PLLC	IGF::CL::IGF CLOSELY ASSOCIATED WV SS00-12-60038 ELECTRONIC DEATH REGISTRATION DELIVERY ORDER. 728,00 NON-EDR RECORDS TOTAL DELIVERY ORDER \$22,000.00. PERIOD OF PERFORMANCE 1/01/2016 - 12/31/2016.	\$22,000.00	\$22,000.00	2016	12/22/2015	5	SS001260038		0 OTHER THAN SMALL BUSINESS
STEVEN P BOWERS	VE EXPRESS REPORTING IGF::CT::IGF	\$22,000.00	\$22,000.00	2015	9/30/2015	2015	SS11511180040		0 SMALL BUSINESS
HPI/GSA - 2B, L.P.	IGF::CL::IGF RMA CALL ORDER - BOWERS	\$21,993.75	\$21,993.75	2015	3/25/2015	20	SS061140039		0 SMALL BUSINESS
SPINELLI, AIMEE L	IGF::OT::IGF RMC HVAC REQUISITION	\$21,960.00	\$21,960.00	2015	6/26/2015	SS061550005			0 OTHER THAN SMALL BUSINESS
ADAMO, EVELYN FELEPPA	VE EXPRESS REPORTING IGF::CT::IGF	\$21,834.00	\$21,834.00	2015	9/30/2015	2015	SS11511180071		0 OTHER THAN SMALL BUSINESS
MC ALPINE, KATHLEEN	ME EXPRESS REPORTING - MENTAL HEALTH IGF::CT::IGF	\$21,780.00	\$21,780.00	2015	9/30/2015	2015	SS10381130028		0 SMALL BUSINESS
	VE EXPRESS REPORTING IGF::CT::IGF	\$21,753.00	\$21,753.00	2015	9/30/2015	2015	SS10881190171		0 SMALL BUSINESS
GONZALEZ, JOSE	IGF::CL::IGF REGION 2 MEDICAL CONSULTANTS. REVIEWS BY MEDICAL CONSULTANT OF DISABILITY CLAIM CASE FILES FOR AGENCY DISABILITY PROGRAM. MODIFICATION TO INCREASE CASE REVIEWS.	\$21,700.00	\$21,700.00	2016	12/7/2015	4	SS021240008	2	SMALL BUSINESS
CLAYTON, ROBERT J MD	ME EXPRESS REPORTING - MENTAL HEALTH IGF::CT::IGF	\$21,670.00	\$21,670.00	2015	9/30/2015	2015	SS10781160158		0 SMALL BUSINESS
DISTRICT OF COLUMBIA, GOVERNMENT OF	IGF::CL::IGF CLOSELY ASSOCIATED DC SS00-12-60019 ELECTRONIC DEATH REGISTRATION DELIVERY ORDER. 7,800 EDR RECORDS TOTAL DELIVERY ORDER \$21,645.00. PERIOD OF PERFORMANCE 1/01/2016 - 12/31/2016.	\$21,645.00	\$21,645.00	2016	12/22/2015	5	SS001260019		0 OTHER THAN SMALL BUSINESS
PAZ, ANNETTE DE	IGF::CL::IGF REGION 2 MEDICAL CONSULTANTS. REVIEWS BY MEDICAL CONSULTANT OF DISABILITY CLAIM CASE FILES FOR AGENCY DISABILITY PROGRAM. MODIFICATION TO INCREASE QUANTITY.	\$21,630.00	\$21,630.00	2016	10/30/2015	2	SS021440024	2	SMALL BUSINESS
MARTZ, ERIN C	VE EXPRESS REPORTING IGF::CT::IGF	\$21,617.00	\$21,617.00	2015	9/30/2015	2015	SS11521100069		0 SMALL BUSINESS
HPI/GSA - 2B, L.P.	IGF::OT::IGF PROVIDE RO OVERTIME AIR-CONDITIONING/HEATING FOR THE 8TH FLOOR ANNEX DPU AND ALL OTHER COMPONENTS SSA COMPONENTS LOCATED AT 1301 YOUNG ST. DALLAS TX 75202.	\$21,600.00	\$21,600.00	2016	9/8/2016	SS061650006			0 OTHER THAN SMALL BUSINESS
HOM, CYNTHIA MD	IGF::CL::IGF  REGION 9 MEDICAL CONSULTANTS. REVIEWS BY MEDICAL CONSULTANT OF DISABILITY CLAIM CASE FILES FOR AGENCY DISABILITY PROGRAM. CALL ORDER TO AWARD CYNTHIA HOM 245 CASES AND 12 NON-CASE HOURS.	\$21,592.56	\$21,592.56	2016	2/24/2016	1	SS09164C026		0 SMALL BUSINESS
MARIA GUMBINAS	IGF::CL::IGF OMA MEDICAL CONSULTANTS. REVIEWS BY MEDICAL CONSULTANT OF DISABILITY CLAIM CASE FILES FOR AGENCY DISABILITY PROGRAM. ADDING ADDITIONAL CASE REVIEWS	\$21,500.00	\$21,500.00	2016	9/9/2016	1	SS00164C021	1	SMALL BUSINESS

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HEALTH AND HUMAN RESOURCES, WEST VIRGINIA DEPARTMENT OF	IGF::OT::IGF OTHER FUNCTIONS WV RECEIPT OF NON-ELECTRONIC DEATH RECORDS FOR OPTION YEAR III PERIOD OF PERFORMANCE JANUARY 1, 2015 - DECEMBER 31, 2015.	\$21,500.00	\$21,500.00	2015	12/22/2014	4	SS001260038	0	OTHER THAN SMALL BUSINESS
TIDWELL, PAIGE	VE EXPRESS REPORTING IGF::CT::IGF	\$21,405.50	\$21,405.50	2015	9/30/2015	2015	SS10541240011	0	SMALL BUSINESS
JAMES E BORDIERI	ME EXPRESS REPORTING - MENTAL HEALTH IGF::CT::IGF	\$21,403.00	\$21,403.00	2015	9/30/2015	2015	SS10631150273	0	SMALL BUSINESS
MCCAFFERY, CHRISTI L	ME EXPRESS REPORTING - MENTAL HEALTH IGF::CT::IGF	\$21,381.00	\$21,381.00	2015	9/30/2015	2015	SS10781360031	0	SMALL BUSINESS
DALTON, CHARLES B	IGF::CL::IGF REGION 2 MEDICAL CONSULTANTS. REVIEWS BY MEDICAL CONSULTANT OF DISABILITY CLAIM CASE FILES FOR AGENCY DISABILITY PROGRAM. INCREASE QUANTITY CASE REVIEWS.	\$21,320.00	\$21,320.00	2016	4/14/2016	1	SS02164C009	2	SMALL BUSINESS
HUNTINGTON, DAVID	VE EXPRESS REPORTING IGF::CT::IGF	\$21,263.00	\$21,263.00	2015	9/30/2015	2015	SS10631350055	0	SMALL BUSINESS
ALLEN, VALERIE	VE EXPRESS REPORTING IGF::CT::IGF	\$21,250.65	\$21,250.65	2015	9/30/2015	2015	SS10541140635	0	SMALL BUSINESS
HPI/GSA - 2B, L.P.	IGF::OT::IGF RMC HVAC REQUISITION	\$21,240.00	\$21,240.00	2016	6/14/2016	SS061650004		0	OTHER THAN SMALL BUSINESS
REDJAE, MARTA MD	RMC - ORIENTATION IGF::CL::IGF	\$21,234.00	\$21,234.00	2015	3/31/2015	1	SS01154C003	0	SMALL BUSINESS
XANTHOPOULOS, LARY	RMC - ORIENTATION IGF::CL::IGF	\$21,234.00	\$21,234.00	2015	3/31/2015	1	SS01154C001	0	SMALL BUSINESS
MCKEEMAN CONSULTING, INC.	VE EXPRESS REPORTING IGF::CT::IGF	\$21,205.00	\$21,205.00	2015	9/30/2015	2015	SS10691170015	0	SMALL BUSINESS
ROBERTS, KELLY	VE EXPRESS REPORTING IGF::CT::IGF	\$21,204.00	\$21,204.00	2015	9/30/2015	2015	SS10781160229	0	SMALL BUSINESS
GRANT & ASSOCIATES	VE EXPRESS REPORTING IGF::CT::IGF	\$21,175.00	\$21,175.00	2015	9/30/2015	2015	SS11521200002	0	SMALL BUSINESS
CLARK VOCATIONAL SERVICES	VE EXPRESS REPORTING IGF::CT::IGF	\$21,160.00	\$21,160.00	2015	9/30/2015	2015	SS10881190197	0	SMALL BUSINESS
DISTRICT OF COLUMBIA, GOVERNMENT OF	IGF::OT::IGF OTHER FUNCTIONS DISTRICT OF COLUMBIA RECEIPT OF ELECTRONIC DEATH RECORDS FOR OPTION YEAR III PERIOD OF PERFORMANCE JANUARY 1, 2015 - DECEMBER 31, 2015.	\$21,099.00	\$21,099.00	2015	12/30/2014	4	SS001260019	0	OTHER THAN SMALL BUSINESS
MARSHALL D TESSNEAR	ME EXPRESS REPORTING - MENTAL HEALTH IGF::CT::IGF	\$21,069.99	\$21,069.99	2015	9/30/2015	2015	SS10381130046	0	SMALL BUSINESS
ABELES, NORMAN	ME EXPRESS REPORTING - MENTAL HEALTH IGF::CT::IGF	\$21,062.00	\$21,062.00	2015	9/30/2015	2015	SS10631150259	0	SMALL BUSINESS
BELT, JAMES H MD	ME EXPRESS REPORTING - MENTAL HEALTH IGF::CT::IGF	\$21,000.00	\$21,000.00	2015	9/30/2015	2015	SS10631150108	0	SMALL BUSINESS
WHITE, JOANNE	VE EXPRESS REPORTING IGF::CT::IGF	\$20,954.00	\$20,954.00	2015	9/30/2015	2015	SS10631450017	0	SMALL BUSINESS
LIPETZ, PSY. D, BRUCE D	IGF::CL::IGF CLOSELY ASSOCIATED - NEW CALL ORDER F	\$20,900.00	\$20,900.00	2016	12/22/2015	1	SS08164C014	0	SMALL BUSINESS
PETER L LEE MD	IGF::CL::IGF  REGION 9 MEDICAL CONSULTANTS. REVIEWS BY MEDICAL CONSULTANT OF DISABILITY CLAIM CASE FILES FOR AGENCY DISABILITY PROGRAM. ADD CASES AND FUNDING.	\$20,850.00	\$20,850.00	2016	6/14/2016	1	SS09164C028	1	SMALL BUSINESS
TANSEY, TIMOTHY N	VE EXPRESS REPORTING IGF::CT::IGF	\$20,837.39	\$20,837.39	2015	9/30/2015	2015	SS10631150351	0	SMALL BUSINESS
HAYNE JR, VAN B.	IGF::CL::IGF MEDICAL CONSULTANT SERVICES TO REVIEW	\$20,750.00	\$20,750.00	2016	8/31/2016	2	SS04164C060	0	SMALL BUSINESS
PA ADVOCATES INC	VE EXPRESS REPORTING IGF::CT::IGF	\$20,742.00	\$20,742.00	2015	9/30/2015	2015	SS10381130051	0	SMALL BUSINESS
HERMAN MILLER, INC.	WINDER, GA YC31 DESIGN, PRODUCT AND INSTALLATION	\$20,714.64	\$20,714.64	2016	5/2/2016	SS001630348	SS001260003	0	OTHER THAN SMALL BUSINESS
ZWI KAHANOWICZ MD	IGF::CL::IGF REGION 2 MEDICAL CONSULTANTS. REVIEWS BY MEDICAL CONSULTANT OF DISABILITY CLAIM CASE FILES FOR AGENCY DISABILITY PROGRAM.	\$20,710.00	\$20,710.00	2016	1/28/2016	1	SS02164C013	0	SMALL BUSINESS
RANDALL, HARRY G	IGF::CL::IGF OMA MEDICAL CONSULTANTS. REVIEWS BY MEDICAL CONSULTANT OF DISABILITY CLAIM CASE FILES FOR AGENCY DISABILITY PROGRAM.	\$20,650.00	\$20,650.00	2016	5/25/2016	1	SS00164C037	0	SMALL BUSINESS
SCHNACKE, STEPHEN B.	VE EXPRESS REPORTING IGF::CT::IGF	\$20,643.00	\$20,643.00	2015	9/30/2015	2015	SS10541140431	0	SMALL BUSINESS
MARQUARDT CONSULTING SERVICES	VE EXPRESS REPORTING IGF::CT::IGF	\$20,636.00	\$20,636.00	2015	9/30/2015	2015	SS10691170061	0	SMALL BUSINESS
BEACHLER, JEANNE	VE EXPRESS REPORTING IGF::CT::IGF	\$20,580.00	\$20,580.00	2015	9/30/2015	2015	SS10631350011	0	SMALL BUSINESS

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Vendor Name	Description of Requirement	Action Obligation	Base and All Options Value	Fiscal Year	Date Signed	PO/Delivery Order/Task Order/Call#	Parent Contract	Mod #	Contracting Officers Business Size Selection
HARRIS M.D., MAURICE	MEDICAL CONSULTANT SERVICES - PHYSICAL CASES CLOSELY ASSOCIATED TO INHERENTLY GOVERNMENTAL FUNCTION IGF::CL::IGF	\$20,502.50	\$20,502.50	2015	3/18/2015	13	SS041140036	0	SMALL BUSINESS
PERRY M WHITE	MEDICAL CONTRACTOR SERVICES - PHYSICAL CASES IGF::CL::IGF	\$20,502.50	\$20,502.50	2015	3/31/2015	12	SS041140054	1	SMALL BUSINESS
ROBERTA A SCHULMAN PHD	DR. SCHULMAN MODIFICATION TO ADD CASES SS00-11-40041 IGF::CT::IGF	\$20,500.00	\$20,500.00	2015	2/12/2015	6	SS001140041	1	SMALL BUSINESS
LEONG MD PA, DOROTHY A.	IGF::CL::IGF LEONG - CALL ORDER - CASES	\$20,495.20	\$20,495.20	2015	3/31/2015	2	SS061440034	0	SMALL BUSINESS
HERMAN MILLER, INC.	BEDFORD HEIGHTS, NY #A160 - TWO NEW HIRES AND RE IGF::CL::IGF	\$20,475.08	\$20,475.08	2016	7/22/2016	SS001630593	SS001260003	0	OTHER THAN SMALL BUSINESS
RITA MORGAN	REGION 2 MEDICAL CONSULTANTS. REVIEWS BY MEDICAL CONSULTANT OF DISABILITY CLAIM CASE FILES FOR AGENCY DISABILITY PROGRAM. MODIFICATION TO ADD CASE REVIEWS AND EXTEND PERFORMANCE PERIOD.	\$20,405.00	\$20,405.00	2015	4/20/2015	8	SS021140096	1	SMALL BUSINESS
TAYLOR, CURTIS E	VE EXPRESS REPORTING IGF::CT::IGF	\$20,401.00	\$20,401.00	2015	9/30/2015	2015	SS10541340007	0	SMALL BUSINESS
RAMIREZ, RICARDO J	IGF::CL::IGF REQUISITION TO INCREASE NON-CASE HOURS AND EXTEND PERIOD OF PERFORMANCE.	\$20,378.25	\$20,378.25	2016	7/8/2016	1	SS01164C025	2	SMALL BUSINESS
BALDWIN, NORMAN F	ME EXPRESS REPORTING - MENTAL HEALTH IGF::CT::IGF	\$20,310.00	\$20,310.00	2015	9/30/2015	2015	SS11501110002	0	SMALL BUSINESS
FALKOVE, MICHAEL	ME EXPRESS REPORTING - MENTAL HEALTH IGF::CT::IGF	\$20,300.00	\$20,300.00	2015	9/30/2015	2015	SS10251120044	0	SMALL BUSINESS
DANIEL J HENNESSY LLC	MEDICAL CONSULTANT SERVICES - INITIAL ORIENTATION IGF::CL::IGF	\$20,250.00	\$20,250.00	2015	9/8/2015	2	SS041440003	1	SMALL BUSINESS
PUBLIC HEALTH, ILLINOIS DEPARTMENT OF	ELECTRONIC DEATH REGISTRATION ILLINOIS THE PURPOSE OF MODIFICATION NUMBER 6 IS TO EXERCISE OPTION YEAR IV TO EXTEND THE TERM OF THE CONTRACT FROM JANUARY 1, 2016 THROUGH DECEMBER 31, 2016 FOR RECEIPT OF ELECTRONIC DEATH RECORDS.	\$0.00	\$20,206.76	2016	12/7/2015	SS001260036		6	OTHER THAN SMALL BUSINESS
DEBOLT, WILLIAM L MD	VE EXPRESS REPORTING IGF::CT::IGF	\$20,120.00	\$20,120.00	2015	9/30/2015	2015	SS11521100064	0	SMALL BUSINESS
NEAL BENTE MD	IGF::CL::IGF REGION 5 MEDICAL CONSULTANTS. REVIEWS BY MEDICAL CONSULTANT OF DISABILITY CLAIM CASE FILES FOR AGENCY DISABILITY PROGRAM. CALL ORDER TO NEAL BENTE.	\$20,072.80	\$20,072.80	2016	3/18/2016	1	SS05164C003	0	SMALL BUSINESS
ZALOUDEK, RICHARD J MD	MEDICAL SERVICE CONSULTANT DR. RICHARD ZALOUDEK IGF::CL::IGF	\$20,072.80	\$20,072.80	2016	3/14/2016	1	SS05164C027	0	SMALL BUSINESS
DANIEL, MARTHA	VE EXPRESS REPORTING IGF::CT::IGF	\$20,048.05	\$20,048.05	2015	9/30/2015	2015	SS10541140315	0	SMALL BUSINESS
NATIONAL JOURNAL GROUP INC	IGF::OT::IGF FY 2017 ANNUAL SUBSCRIPTION RENEWAL FOR NATIONAL JOURNAL	\$20,010.00	\$20,010.00	2017	10/1/2016	SS001750002		0	SMALL BUSINESS
DPC CONSULTING LLC	MEDICAL CONSULTANT SERVICES - PHYSICAL CASE REVIEWS IGF::CL::IGF	\$20,000.00	\$20,000.00	2015	6/11/2015	2	SS041540002	0	SMALL BUSINESS
DPC CONSULTING LLC	MEDICAL CONSULTANT SERVICES - PHYSICAL CASE REVIEWS IGF::CL::IGF	\$20,000.00	\$20,000.00	2015	9/9/2015	2	SS041540002	1	SMALL BUSINESS
I/S MANAGEMENT STRATEGIES LTD	RENEWAL OF SS00-15-50037 MAINTENANCE OF I/S MAN	\$20,000.00	\$20,000.00	2016	11/5/2015	SS001650022		0	OTHER THAN SMALL BUSINESS
HEALTH AND ENVIRONMENTAL CONTROL, SOUTH CAROLINA DEPARTMENT OF	IGF::OT::IGF OTHER FUNCTIONS SC RECEIPT OF ELECTRONIC DEATH RECORDS FOR OPTION YEAR IV PERIOD OF PERFORMANCE JANUARY 1, 2015 - DECEMBER 31, 2015.	\$19,998.48	\$19,998.48	2016	12/3/2015	4	SS001260054	1	OTHER THAN SMALL BUSINESS

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HEALTH, VERMONT DEPARTMENT OF	IGF::OT::IGF OTHER FUNCTIONS VT RECEIPT OF ELECTRONIC DEATH RECORDS FOR OPTION YEAR IV PERIOD OF PERFORMANCE JANUARY 1, 2015 - DECEMBER 31, 2015.	\$19,998.48	\$19,998.48	2016	12/3/2015	4	SS001260058	1	OTHER THAN SMALL BUSINESS
HEALTH AND ENVIRONMENTAL CONTROL, SOUTH CAROLINA DEPARTMENT OF	IGF::CL::IGF CLOSELY ASSOCIATED ADDING ADDITINAL FUNDS FOR ELECTRONIC DEATH REGISTRATION (EDR)FOR SOUTH CAROLINA STATE	\$19,998.44	\$19,998.44	2015	3/13/2015	3	SS001260054	1	OTHER THAN SMALL BUSINESS
HEALTH, FLORIDA DEPARTMENT OF	IGF::CL::IGF CLOSELY ASSOCIATED ADDING ADDITINAL FUNDS FOR ELECTRONIC DEATH REGISTRATION (EDR) OPTION YEAR II FOR FLORIDA STATE	\$19,998.44	\$19,998.44	2015	3/11/2015	3	SS001260020	1	OTHER THAN SMALL BUSINESS
MID ATLANTIC REHABILITATION MANAGEMENT INC	VE EXPRESS REPORTING IGF::CT::IGF	\$19,984.00	\$19,984.00	2015	9/30/2015	2015	SS10381130253	0	SMALL BUSINESS
TAMMIE DONALDSON	VE EXPRESS REPORTING IGF::CT::IGF	\$19,980.00	\$19,980.00	2015	9/30/2015	2015	SS10781160211	0	SMALL BUSINESS
PHILP R BRAUN	ME EXPRESS REPORTING - MENTAL HEALTH IGF::CT::IGF	\$19,970.00	\$19,970.00	2015	9/30/2015	2015	SS10381130088	0	SMALL BUSINESS
COMESS, LEONARD J	IGF::CL::IGF REGIONAL MEDICAL CONSULTANT SERVICES FOR THE SOCIAL SECURITY ADMINISTRATION. REVIEWS BY MEDICAL CONSULTANT OF DISABILITY CLAIM CASE FILES FOR AGENCY DISABILITY PROGRAM.	\$19,964.44	\$19,964.44	2016	1/5/2016	1	SS02164C006	0	SMALL BUSINESS
DOLAN CAREER & REHABILITATION CONSULTING LTD	VE EXPRESS REPORTING IGF::CT::IGF	\$19,953.87	\$19,953.87	2015	9/30/2015	2015	SS10691170057	0	SMALL BUSINESS
JAFFEE, ALVIN	ME EXPRESS REPORTING - MENTAL HEALTH IGF::CT::IGF	\$19,950.00	\$19,950.00	2015	9/30/2015	2015	SS10781160088	0	SMALL BUSINESS
FRANK A. LINDNER, M.S., C.R.C., L.M.H.C.	VE EXPRESS REPORTING IGF::CT::IGF	\$19,922.00	\$19,922.00	2015	9/30/2015	2015	SS10251320017	0	SMALL BUSINESS
COMMUNITY HEALTH, MICHIGAN DEPARTMENT OF	IGF::CL::IGF CLOSELY ASSOCIATED DELIVERY ORDER FOR ELECTRONIC DEATH RECORDS. 7165 EDR RECORDS. TOTAL \$19,884.85	\$19,884.85	\$19,884.85	2016	12/23/2015	5	SS001260052	0	OTHER THAN SMALL BUSINESS
HERMAN MILLER, INC.	YAKIMA, WA I919 -RECONFIGURATION OF TWO X-95 WC	\$19,856.70	\$19,856.70	2015	1/12/2015	SS001530208	SS001260003	0	OTHER THAN SMALL BUSINESS
CARO, WILDALIZ	ME EXPRESS REPORTING - MENTAL HEALTH IGF::CT::IGF	\$19,800.00	\$19,800.00	2015	9/30/2015	2015	SS10251520000	0	SMALL BUSINESS
ELOFSON, OLOF RHODIUS PHD	VE EXPRESS REPORTING IGF::CT::IGF	\$19,733.10	\$19,733.10	2015	9/30/2015	2015	SS11521100027	0	SMALL BUSINESS
PITNEY BOWES INC.	MAILROOM SUPPLIES NEEDED FOR THE OPERATION OF T	\$19,713.30	\$19,713.30	2015	8/12/2015	SS001550255		0	OTHER THAN SMALL BUSINESS
PUBLIC HEALTH, ILLINOIS DEPARTMENT OF	ELECTRONIC DEATH REGISTRATION - ILLINOIS THE PURPOSE OF MODIFICATION NUMBER 5 IS TO EXERCISE OPTION YEAR THREE TO EXTEND THE TERM OF THE CONTRACT FROM JANUARY 1, 2015 THROUGH DECEMBER 31, 2015 FOR RECEIPT OF ELECTRONIC DEATH RECORDS.	\$0.00	\$19,697.04	2015	12/4/2014	SS001260036		5	OTHER THAN SMALL BUSINESS
LOGAN, WILLIAM M	IGF::CL::IGF REGION 6 MEDICAL CONSULTANTS. REVIEWS BY MEDICAL CONSULTANT OF DISABILITY CLAIM CASE FILES FOR AGENCY DISABILITY PROGRAM.	\$19,669.00	\$19,669.00	2015	1/5/2015	19	SS061140038	0	SMALL BUSINESS
PHILIP J GELBER MD	ME EXPRESS REPORTING - MENTAL HEALTH IGF::CT::IGF	\$19,650.00	\$19,650.00	2015	9/30/2015	2015	SS10881190060	0	SMALL BUSINESS
ALKA BISHNOI MD	IGF::CL::IGF REGION 2 MEDICAL CONSULTANTS. REVIEWS BY MEDICAL CONSULTANT OF DISABILITY CLAIM CASE FILES FOR AGENCY DISABILITY PROGRAM.	\$19,633.08	\$19,633.08	2016	12/31/2015	1	SS02164C001	0	SMALL BUSINESS
CORTEZ, JENNIFER A	ME EXPRESS REPORTING - MENTAL HEALTH IGF::CT::IGF	\$19,610.00	\$19,610.00	2015	9/30/2015	2015	SS10251120040	0	SMALL BUSINESS
EASTMAN KODAK COMPANY	THIS IS THE ANNUAL PROCUREMENT OF INK FOR SSA'S VL2000 KODAK PRINTERS, OTHERWISE KNOWN AS THE SSN CARD PRINTERS.  THE PROCUREMENT INCLUDE INK AND SPECIALIZED KODAK CLEANER NEEDS FOR BOTH THE NCC AND SSC SITES. DUE TO STORAGE LIMITATIONS IN THE SSC, SHIPMENTS WILL BE DELIVERED TO THE NCC AND NCC STAFFS WILL SEND INK TO THE SSC AS NEEDED.	\$19,600.00	\$19,600.00	2015	4/17/2015	SS001550120		0	OTHER THAN SMALL BUSINESS
MC CLAIN, TERESA A	VE EXPRESS REPORTING IGF::CT::IGF	\$19,588.75	\$19,588.75	2015	9/30/2015	2015	SS10631150031	0	SMALL BUSINESS

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HPI/GSA - 2B, L.P.	IGF::OT::IGF RO OVERTIME UTILITIES FY15	\$19,560.00	\$19,560.00	2015	8/7/2015	SS061550003		0	OTHER THAN SMALL BUSINESS
ROCKET SOFTWARE, INC.	MAINTENANCE ON ROCKET DASD SOFTWARE AND ROCK	\$19,541.70	\$19,541.70	2015	3/31/2015	SS001550025		1	OTHER THAN SMALL BUSINESS
MEADOWLARK MEDICAL SERVICES, PA	IGF::CL::IGF CLOSELY ASSOCIATED - CALL ORDER FOR II	\$19,536.00	\$19,536.00	2016	8/22/2016		1 SS07164C016	0	SMALL BUSINESS
DAVIS, GERALD Y M ED CRC	VE EXPRESS REPORTING IGF::CT::IGF	\$19,515.00	\$19,515.00	2015	9/30/2015		2015 SS10881190245	0	SMALL BUSINESS
JULIAN R GOLDBERG MD	IGF::CL::IGF OMA MEDICAL CONSULTANTS. REVIEWS BY MEDICAL CONSULTANT OF DISABILITY CLAIM CASE FILES FOR AGENCY DISABILITY PROGRAM. ADDING ADDITIONAL HOURS AND INDEPENDENT CASES.	\$19,500.00	\$19,500.00	2017	11/28/2016		1 SS00164C018	2	SMALL BUSINESS
TELESTREAM, INC.	THE OCOMM REQUEST SEVEN LICENSES OF CAPTIONMA	\$19,428.00	\$19,428.00	2015	6/9/2015	SS001550163		0	OTHER THAN SMALL BUSINESS
HEALTH SERVICES, ARIZONA DEPT OF	ELECTRONIC DEATH REGISTRATION ARIZONA THE PURPOSE OF MODIFICATION NUMBER 6 IS TO EXERCISE OPTION YEAR IV TO EXTEND THE TERM OF THE CONTRACT FROM JANUARY 1, 2016 THROUGH DECEMBER 31, 2016 FOR RECEIPT OF ELECTRONIC DEATH RECORDS.	\$0.00	\$19,425.00	2016	12/2/2015	SS001260014		6	OTHER THAN SMALL BUSINESS
HERMAN MILLER, INC.	KOSCIUSKO, MS #CB15 - DESIGN, INSTALLATION AND PR	\$19,422.56	\$19,422.56	2015	3/19/2015	SS001530325	SS001260003	0	OTHER THAN SMALL BUSINESS
SHAPIRO, TERRY H	ME EXPRESS REPORTING - MENTAL HEALTH IGF::CT::IGF	\$19,400.00	\$19,400.00	2015	9/30/2015		2015 SS10631150174	0	SMALL BUSINESS
COMMUNITY HEALTH, MICHIGAN DEPARTMENT OF	IGF::OT::IGF OTHER FUNCTIONS MI RECEIPT ELECTRONIC DEATH RECORDS FOR OPTION YEAR III PERIOD OF PERFORMANCE JANUARY 1, 2015 - DECEMBER 31, 2015.	\$19,386.35	\$19,386.35	2015	12/29/2014		4 SS001260052	0	OTHER THAN SMALL BUSINESS
ROBERT J VERKINS	ME EXPRESS REPORTING - MENTAL HEALTH IGF::CT::IGF	\$19,369.00	\$19,369.00	2015	9/30/2015		2015 SS10631150257	0	SMALL BUSINESS
WILFRED ROUX CONSULTANTS	VE EXPRESS REPORTING IGF::CT::IGF	\$19,246.16	\$19,246.16	2015	9/30/2015		2015 SS10781460018	0	SMALL BUSINESS
STERN PHD, THOMAS	IGF::CL::IGF BLANKET PURCHASE AGREEMENTS FOR CONTRACTORS TO PROVIDE REGIONAL MEDICAL CONSULTANT SERVICES FOR THE SOCIAL SECURITY ADMINISTRATION. REVIEWS BY MEDICAL CONSULTANT OF DISABILITY CLAIM CASE FILES FOR AGENCY DISABILITY PROGRAM. MODIFICATION TO ADD CASES AND EXTEND THE PERIOD OF PERFORMANCE.	\$19,182.00	\$19,182.00	2016	7/31/2016		1 SS09164C025	1	SMALL BUSINESS
STERN PHD, THOMAS	IGF::CL::IGF  REGION 9 MEDICAL CONSULTANTS. REVIEWS BY MEDICAL CONSULTANT OF DISABILITY CLAIM CASE FILES FOR AGENCY DISABILITY PROGRAM. CALL ORDER TO AWARD THOMAS STERN 225 CASES AND 4 NON-CASE HOURS.	\$19,151.52	\$19,151.52	2016	2/29/2016		1 SS09164C025	0	SMALL BUSINESS
VIZUALL, INC	RENEW MAINTENANCE FOR VIZUALL, SCHEDUALL SILVER	\$19,124.10	\$19,124.10	2015	5/12/2015	SS001550142		0	SMALL BUSINESS
GOZI MEDICAL & OCCUPATIONAL HEALTH LTD	ME EXPRESS REPORTING - MENTAL HEALTH IGF::CT::IGF	\$19,090.00	\$19,090.00	2015	9/30/2015		2015 SS10631150242	0	OTHER THAN SMALL BUSINESS
DINGES, MAUREEN	IGF::CL::IGF MEDICAL CONSULTANT SERVICES TO REVIEW	\$19,082.25	\$19,082.25	2017	11/23/2016		2 SS04164C014	0	SMALL BUSINESS
RAMIREZ, STEVE	VE EXPRESS REPORTING IGF::CT::IGF	\$19,067.00	\$19,067.00	2015	9/30/2015		2015 SS10881390023	0	SMALL BUSINESS
JOHNSON, CANDICE E MD	IGF::CL::IGF CLOSELY ASSOCIATED - INDEPENDENT CAS	\$19,000.00	\$19,000.00	2016	2/19/2016		1 SS08164C011	1	SMALL BUSINESS
HOWARD T HORSLEY JR MD PC	IGF::CL::IGF CLOSELY ASSOCIATED NEW CALL ORDER IN	\$19,000.00	\$19,000.00	2016	12/18/2015		1 SS08164C009	0	SMALL BUSINESS
THREATGUARD, INC.	THE OFFICE OF TELECOMMUNICATIONS AND SYSTEMS O	\$19,000.00	\$19,000.00	2015	6/9/2015	SS001550164		0	SMALL BUSINESS
VITOLO, MD, JOSEPH G.	ME EXPRESS REPORTING - MENTAL HEALTH IGF::CT::IGF	\$18,987.93	\$18,987.93	2015	9/30/2015		2015 SS10251120006	0	SMALL BUSINESS
HINES & ASSOCIATES INC	ME EXPRESS REPORTING - MENTAL HEALTH IGF::CT::IGF	\$18,938.00	\$18,938.00	2015	9/30/2015		2015 SS10631150367	0	SMALL BUSINESS
HEALTH SERVICES, ARIZONA DEPT OF	NON-ELECTRONIC DEATH RECORDS - ARIZONA THE PURPOSE OF MODIFICATION NUMBER 5 IS TO EXERCISE OPTION YEAR THREE TO EXTEND THE TERM OF THE CONTRACT FROM JANUARY 1, 2015 THROUGH DECEMBER 31, 2015 FOR RECEIPT OF ELECTRONIC DEATH RECORDS.	\$0.00	\$18,935.00	2015	12/16/2014	SS001260014		5	OTHER THAN SMALL BUSINESS
VAN HOOSE, THOMAS A PHD	IGF::CL::IGF VAN HOOSE - CALL ORDER - CASES	\$18,912.50	\$18,912.50	2015	8/28/2015		13 SS061140025	1	SMALL BUSINESS



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SHWETZ, MARY H MD	IGF::CL::IGF CLOSELY ASSOCIATED SHWETZ, MC, REGION 10 ADD FUNDING AND CASES	\$18,900.00	\$18,900.00	2016	2/10/2016	2	SS10154C008	0	SMALL BUSINESS
HEALTH, VERMONT DEPARTMENT OF	ELECTRONIC DEATH REGISTRATION VERMONT THE PURPOSE OF MODIFICATION NUMBER 5 IS TO EXERCISE OPTION YEAR IV TO EXTEND THE TERM OF THE CONTRACT FROM JANUARY 1, 2016 THROUGH DECEMBER 31, 2016 FOR RECEIPT OF ELECTRONIC DEATH RECORDS.	\$0.00	\$18,870.00	2016	12/3/2015	SS001260058		5	OTHER THAN SMALL BUSINESS
DEREK J. O'BRIEN, M.D., P.C.	IGF::CL::IGF MODIFICATION TO ADD CASES AND EXTEND	\$18,765.00	\$18,765.00	2016	6/23/2016	1	SS04164C005	1	SMALL BUSINESS
FANCHER, IRIS MD	IGF::CL::IGF MODIFICATION TO ADD CASES AND EXTEND	\$18,765.00	\$18,765.00	2016	6/14/2016	1	SS04164C015	3	SMALL BUSINESS
RAVIZEE, ISAAC C JR MD	IGF::CL::IGF MODIFICATION TO ADD CASES AND EXTEND	\$18,765.00	\$18,765.00	2016	6/15/2016	1	SS04164C016	3	SMALL BUSINESS
ARNOLD, CHARLES O II	IGF::CL::IGF CLOSELY ASSOCIATED -NEW CALL ORDER F	\$18,750.00	\$18,750.00	2016	12/21/2015	1	SS08164C003	0	SMALL BUSINESS
NATIONAL JOURNAL GROUP INC	FY 2016 SUBSCRIPTION TO THE NATIONAL JOURNAL WWW.NATIONALJOURNAL.COM PERIOD OF PERFORMANCE 10/01/2015 - 9/30/2016.	\$18,720.00	\$18,720.00	2016	10/1/2015	SS001650004		0	SMALL BUSINESS
PRESTO, JOSEPH	IGF::CL::IGF REGION 2 MEDICAL CONSULTANTS. REVIEWS BY MEDICAL CONSULTANT OF DISABILITY CLAIM CASE FILES FOR AGENCY DISABILITY PROGRAM.	\$18,720.00	\$18,720.00	2016	10/30/2015	6	SS021240002	0	SMALL BUSINESS
REID, JAMES	ME EXPRESS REPORTING - MENTAL HEALTH IGF::CT::IGF	\$18,720.00	\$18,720.00	2015	9/30/2015	2015	SS10691170020	0	SMALL BUSINESS
FREELS LLOYD, LESLIE	VE EXPRESS REPORTING IGF::CT::IGF	\$18,590.15	\$18,590.15	2015	9/30/2015	2015	SS10541140603	0	SMALL BUSINESS
HEALTH & SENIOR SERVICES, NEW JERSEY DEPARTMENT OF	IGF::CL::IGF CLOSELY ASSOCIATED NJ RECEIPT OF ELECTRONIC DEATH RECORDS. 6688 RECORDS = \$18,560.78. PERIOD OF PERFORMANCE 01/01/2016-01/31/2016.	\$18,560.78	\$18,560.78	2016	12/23/2015	5	SS001260031	0	OTHER THAN SMALL BUSINESS
FUSCALDO, NICOLE M	VE EXPRESS REPORTING IGF::CT::IGF	\$18,467.00	\$18,467.00	2015	9/30/2015	2015	SS10781460010	0	SMALL BUSINESS
VOCATIONAL EVALUATIONS LLC	VE EXPRESS REPORTING IGF::CT::IGF	\$18,454.00	\$18,454.00	2015	9/30/2015	2015	SS10541440047	0	SMALL BUSINESS
CALLINS, W PAUL MD	MEDICAL CONSULTANT SERVICES - PHYSICAL CASES CLOSELY ASSOCIATED TO INHERENTLY GOVERNMENTAL FUNCTION IGF::CL::IGF	\$18,452.25	\$18,452.25	2015	12/11/2014	16	SS041040093	0	SMALL BUSINESS
THOMAS S ROWE MD	MEDICAL CONSULTANT SERVICES - PHYSICAL CASES IGF::CL::IGF	\$18,452.25	\$18,452.25	2015	3/31/2015	17	SS041140049	1	SMALL BUSINESS
UPCHURCH, JAMES C	MEDICAL CONTRACTOR SERVICES - PHYSICAL CASES CLOSELY ASSOCIATED TO INHERENTLY GOVERNMENTAL FUNCTION IGF::CL::IGF FOR CLOSELY ASSOCIATED	\$18,452.25	\$18,452.25	2015	4/1/2015	14	SS041140026	1	SMALL BUSINESS
CESARE PSY D, LARRY A	ME EXPRESS REPORTING - MENTAL HEALTH IGF::CT::IGF	\$18,440.00	\$18,440.00	2015	9/30/2015	2015	SS10631350018	0	SMALL BUSINESS
HERMAN MILLER, INC.	BOCA RATON, FL IC16 DESIGN AND INSTALLATION FOR S	\$18,409.59	\$18,409.59	2016	11/10/2015	SS001630048		0	OTHER THAN SMALL BUSINESS
HEALTH, VERMONT DEPARTMENT OF	ELECTRONIC DEATH REGISTRATION - VERMONT. THE PU	\$0.00	\$18,394.00	2015	12/2/2014	SS001260058		4	OTHER THAN SMALL BUSINESS
REPLIWEB, INC.	MAINTENANCE ON ATTUNITY REPLIWEB	\$18,391.80	\$18,391.80	2016	6/6/2016	SS001650133		0	SMALL BUSINESS
HERMAN MILLER, INC.	SYSTEMS FURNITURE CONTRACT - SUMTER, SC #1595 DE	\$18,371.64	\$18,371.64	2017	11/28/2016	SS001730046		0	OTHER THAN SMALL BUSINESS
JULIAN R GOLDBERG MD	IGF::CL::IGF OMA MEDICAL CONSULTANTS. REVIEWS BY MEDICAL CONSULTANT OF DISABILITY CLAIM CASE FILES FOR AGENCY DISABILITY PROGRAM.	\$18,350.00	\$18,350.00	2016	5/31/2016	1	SS00164C018	0	SMALL BUSINESS
RICHARD L COHEN DR	IGF::CL::IGF OMA MEDICAL CONSULTANTS. REVIEWS BY MEDICAL CONSULTANT OF DISABILITY CLAIM CASE FILES FOR AGENCY DISABILITY PROGRAM.	\$18,350.00	\$18,350.00	2016	5/25/2016	1	SS00164C057	0	SMALL BUSINESS
CLUNE, SARAH	ME EXPRESS REPORTING - MENTAL HEALTH IGF::CT::IGF	\$18,330.00	\$18,330.00	2015	9/30/2015	2015	SS10631150022	0	SMALL BUSINESS

Sole Source Contracts  
(December 1, 2014 - December 1, 2016)

Vendor Name	Description of Requirement	Action Obligation	Base and All Options Value	Fiscal Year	Date Signed	PO/Delivery Order/Task Order/Call#	Parent Contract	Mod #	Contracting Officers Business Size Selection
STATE HEALTH SERVICES, TEXAS DEPARTMENT OF	IGF::OT::IGF OTHER FUNCTIONS TX EXERCISE OPTION YEAR 1 ENUMERATION AT BIRTH (EAB) TEXAS: THE CONTRACTOR SHALL PROVIDE BIRTH RECORDS FOR THE PURPOSE OF OBTAINING SOCIAL SECURITY NUMBER (SSN) AT BIRTH IN ACCORDANCE WITH THE ATTACHED STATEMENT OF WORK.	\$1,679,164.46	\$18,301.52	2015	5/21/2015	SS001461046		1	OTHER THAN SMALL BUSINESS
KATHLEEN O'BRIEN	IGF::CL::IGF REGIONAL MEDICAL CONSULTANT SERVICES FOR THE SOCIAL SECURITY ADMINISTRATION. REVIEWS BY MEDICAL CONSULTANT OF DISABILITY CLAIM CASE FILES FOR AGENCY DISABILITY PROGRAM. MODIFICATION TO ADD CASES	\$18,248.00	\$18,248.00	2016	6/3/2016		2 SS05154C008	1	SMALL BUSINESS
SHARPE, CASEY	REGION 5 MEDICAL CONSULTANTS. REVIEWS BY MEDICAL CONSULTANT OF DISABILITY CLAIM CASE FILES FOR AGENCY DISABILITY PROGRAM. MODIFICATION TO ADD CASE REVIEWS. IGF::CL::IGF	\$18,248.00	\$18,248.00	2016	9/27/2016		2 SS05154C002	1	SMALL BUSINESS
BARNES, LAVERNE MONISE	REGION V MEDICAL CONSULTANT SERVICES FOR THE SOCIAL SECURITY ADMINISTRATION. REVIEWS BY MEDICAL CONSULTANT OF DISABILITY CLAIM CASE FILES FOR AGENCY DISABILITY PROGRAM. ADDING INDEPENDENT CASE REVIEWS. IGF::CL::IGF	\$18,248.00	\$18,248.00	2016	9/28/2016		2 SS05164C002	1	SMALL BUSINESS
GAWO MD, YACOB	THIS IS TO FUND A NEW CALL ORDER FOR INDEPENDENT CASE REVIEWS AGAINST SS05-16-4C011, CALL ORDER 1. DR YACOB GAWO M.D. IGF::CT::IGF	\$18,248.00	\$18,248.00	2016	3/22/2016		1 SS05164C011	0	SMALL BUSINESS
OCCUPATIONAL & ENVIRONMENTAL MEDICINE CONSULTING	ME EXPRESS REPORTING - MENTAL HEALTH IGF::CT::IGF	\$18,245.00	\$18,245.00	2015	9/30/2015		2015 SS10541140118	0	SMALL BUSINESS
HERMAN MILLER, INC.	ALBUQUERQUE NM ODAR #YX12 INSTALLATION OF 11 E	\$18,190.14	\$18,190.14	2015	8/6/2015	SS001530521		1	OTHER THAN SMALL BUSINESS
KUSHNER, IRVING	ME EXPRESS REPORTING - MENTAL HEALTH IGF::CT::IGF	\$18,170.00	\$18,170.00	2015	9/30/2015		2015 SS10631150210	0	SMALL BUSINESS
HEALTH & SENIOR SERVICES, NEW JERSEY DEPARTMENT OF	IGF::OT::IGF OTHER FUNCTIONS NJ RECEIPT OF ELECTRONIC DEATH RECORDS FOR OPTION III PERIOD OF PERFORMANCE JANUARY 1, 2015 - DECEMBER 31, 2015.	\$18,101.86	\$18,101.86	2015	12/29/2014		4 SS001260031	0	OTHER THAN SMALL BUSINESS
ALKA BISHNOI MD	IGF::CL::IGF REGION 2 MEDICAL CONSULTANTS. REVIEWS BY MEDICAL CONSULTANT OF DISABILITY CLAIM CASE FILES FOR AGENCY DISABILITY PROGRAM.	\$18,094.50	\$18,094.50	2015	12/15/2014		7 SS021140001	0	SMALL BUSINESS
LEN BUS & LANGUAGE INSTITUTE	VE EXPRESS REPORTING IGF::CT::IGF	\$18,059.00	\$18,059.00	2015	9/30/2015		2015 SS10881190151	0	SMALL BUSINESS
BILLINGS FUESS	ME EXPRESS REPORTING - MENTAL HEALTH IGF::CT::IGF	\$18,040.00	\$18,040.00	2015	9/30/2015		2015 SS11501110014	0	SMALL BUSINESS
PEPI GRANAT MD	ME EXPRESS REPORTING - MENTAL HEALTH IGF::CT::IGF	\$18,040.00	\$18,040.00	2015	9/30/2015		2015 SS10541140114	0	SMALL BUSINESS
SCOTT STIPE & ASSOCIATES, INC.	VE EXPRESS REPORTING IGF::CT::IGF	\$18,035.00	\$18,035.00	2015	9/30/2015		2015 SS11521100055	0	SMALL BUSINESS
GARRISON, JOHN E PHD	IGF::CL::IGF - SS01-16-4C010 GARRISON, JOHN REQUIS	\$18,031.50	\$18,031.50	2016	2/13/2016		1 SS01164C010	0	SMALL BUSINESS
GARRISON, JOHN E PHD	IGF::CL::IGF - SS01-16-4C010- GARRISON, JOHN- REQUIS	\$18,031.50	\$18,031.50	2017	10/3/2016		2 SS01164C010	0	SMALL BUSINESS
PAZ, ANNETTE DE	IGF::CL::IGF REGION 2 MEDICAL CONSULTANTS. REVIEWS BY MEDICAL CONSULTANT OF DISABILITY CLAIM CASE FILES FOR AGENCY DISABILITY PROGRAM. MODIFICATION TO INCREASE QUANTITY AND EXTEND PERFORMANCE.	\$18,025.00	\$18,025.00	2015	6/12/2015		2 SS021440024	1	SMALL BUSINESS

Sole Source Contracts  
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Vendor Name	Description of Requirement	Action Obligation	Base and All Options Value	Fiscal Year	Date Signed	PO/Delivery Order/Task Order/Call#	Parent Contract	Mod #	Contracting Officers Business Size Selection
EMPLOYMENT DEVELOPMENT, CALIFORNIA DEPARTMENT OF	CALIFORNIA EMPLOYMENT DEVELOPMENT DEPARTMENT  IGF::CT::IGF  CALIFORNIA EDD IS THE STATE AGENCY RESPONSIBLE FOR ADMINISTERING AND PROVIDING INFORMATION ON STATE DISABILITY INSURANCE (SDI) BENEFITS. SDI BENEFITS OFFSET SSDI PAYMENTS. IN ORDER TO ACCURATELY PAY BENEFICIARIES, SDI PAYMENT ACCOUNTS MUST BE VERIFIED.  THE EDD AGREES TO PROVIDE CONFIDENTIAL CURRENT AND ARCHIVE DISABILITY INSURANCE CLAIM HISTORY TO SSA. SSA WILL USE THE INFORMATION FOR THE PURPOSE OF DETERMINING THE AMOUNT OF SOCIAL SECURITY BENEFITS PAYABLE UNDER TITLE II SECTION 224 OF THE SOCIAL SECURITY ACT (42 U.S.C. 424A) AS REQUIRED BY SECTION 1137 OF THE SOCIAL SECURITY ACT (42 U.S.C. 1320B-7), SECTION 1106 OF THE SOCIAL SECURITY ACT (42 U.S.C. 1306), THE PRIVACY ACT (5 U.S.C. 552), AND THE FREEDOM OF INFORMATION ACT (5 U.S.C.552).	\$18,000.00	\$18,000.00	2016	6/14/2016	SS091652002			0 OTHER THAN SMALL BUSINESS
EMPLOYMENT DEVELOPMENT, CALIFORNIA DEPARTMENT OF	IGF::CT::IGF  THE CALIFORNIA EMPLOYMENT DEVELOPMENT DEPARTMENT (EDD) IS THE PROVIDER FOR BENEFICIARY DISABILITY INFORMATION.	\$18,000.00	\$18,000.00	2015	9/3/2015	SS091551010			0 OTHER THAN SMALL BUSINESS
EISENBERG MD PA, IRIS	ME EXPRESS REPORTING - MENTAL HEALTH IGF::CT::IGF	\$17,920.00	\$17,920.00	2015	9/30/2015	2015	SS10541140044		0 OTHER THAN SMALL BUSINESS
SABREE, INC.	IGF::OT::IGF  CAGE CODE: 4KUQ1  REMOVE OF CARPET TILE/FLOOR TILE IN ROOM 633 ALTMAYER BUILDING.	\$17,813.91	\$17,813.91	2015	12/10/2014	SS001530082	SS001461113		0 SMALL BUSINESS
VIDA VOCATIONAL COUNSELING CORP	VE EXPRESS REPORTING IGF::CT::IGF	\$17,706.61	\$17,706.61	2015	9/30/2015	2015	SS10541440053		0 SMALL BUSINESS
HERMAN MILLER, INC.	MT. PLEASANT TX FO #X122. INSTALLATION OF A P-01 W	\$17,696.96	\$17,696.96	2016	1/11/2016	SS001630136	SS001260003		0 OTHER THAN SMALL BUSINESS
FUTURENET SECURITY SOLUTIONS, LLC	IGF::OT::IGF - PURCHASE ORDER SS00-15-50192 FOR VEH	\$17,689.00	\$17,689.00	2015	7/8/2015	SS001550192			0 OTHER THAN SMALL BUSINESS
YAZBAK, F EDWARD	ME EXPRESS REPORTING - MENTAL HEALTH IGF::CT::IGF	\$17,640.00	\$17,640.00	2015	9/30/2015	2015	SS11501110046		0 OTHER THAN SMALL BUSINESS
SIGNET TECHNOLOGIES, INC.	IGF::OT::IGF OTHER FUNCTION LENEL PART NUMBER: NEC ECLANX64-R2-R3X64 EXPRESSCLUSTER X LAN 64 BIT (R1 OR R2) UPGRADE, TWO UNINTERRUPTIBLE POWER SUPPLY, AND INSTALLATION SERVICES FOR THE OFFICE OF DISABILITY ADJUDICATION AND REVIEW, 5107 LEESBURG PIKE, FALLS CHURCH, VIRGINIA.	\$17,627.84	\$17,627.84	2015	3/16/2015	SS001550093			0 SMALL BUSINESS
CRYSTAL L. DUNSON AND ASSOCIATES, INCORPORATED	IGF::CL::IGF REGION 2 MEDICAL CONSULTANTS. REVIEWS BY MEDICAL CONSULTANT OF DISABILITY CLAIM CASE FILES FOR AGENCY DISABILITY PROGRAM. ORIENTATION.	\$17,600.00	\$17,600.00	2015	12/1/2014	1	SS021440025		0 SMALL BUSINESS

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Vendor Name	Description of Requirement	Action Obligation	Base and All Options Value	Fiscal Year	Date Signed	PO/Delivery Order/Task Order/Call#	Parent Contract	Mod #	Contracting Officers Business Size Selection
WOLFF, THEODORE	OMA MEDICAL CONSULTANTS. REVIEWS BY MEDICAL CONSULTANT OF DISABILITY CLAIM CASE FILES FOR AGENCY DISABILITY PROGRAM. AWARDING DR. WOLFF INDEPENDENT CASE REVIEWS AND NON-CASE SERVICES. IGF::CL::IGF	\$17,550.00	\$17,550.00	2016	8/26/2016	1	SS00164C053	0	SMALL BUSINESS
PRESTO, JOSEPH	IGF::CL::IGF REGION 2 MEDICAL CONSULTANTS. REVIEWS BY MEDICAL CONSULTANT OF DISABILITY CLAIM CASE FILES FOR AGENCY DISABILITY PROGRAM.	\$17,472.00	\$17,472.00	2016	4/7/2016	6	SS021240002	1	SMALL BUSINESS
RASMUSSEN, CLYDE M	VE EXPRESS REPORTING IGF::CT::IGF	\$17,450.00	\$17,450.00	2015	9/30/2015	2015	SS11521100050	0	SMALL BUSINESS
HENSEL PHELPS SERVICES LLC	IGF::OT::IGF  PROVIDE FOUR (4) DEDICATED WORKSTATIONS WITH ASSOCIATED HARDWARE AND SOFTWARE FOR THE BUILDING AUTOMATION SYSTEM (BAS) AT THE NSC. THE BAS IS CURRENTLY EMBEDDED WITHIN THE SIEMENS PROCESS CONTROL SYSTEM (PCS7) THAT IS CAUSING UNSTABLE OPERATION OF BOTH SYSTEMS.	\$17,432.35	\$17,432.35	2016	3/29/2016	SS001630253	SS001461106	0	OTHER THAN SMALL BUSINESS
HELP/SYSTEMS, LLC	MAINTENANCE RENEWAL- ISERIES AUDIT AND VULNERA	\$17,405.00	\$17,405.00	2015	8/21/2015	SS001550015		1	OTHER THAN SMALL BUSINESS
JOHNSON CONTROLS, INC.	IGF::CT::IGF  CAGE CODE: 25244  SERVICE TO PERFORM EMERGENCY REPAIRS TO THE NCC UTILITY BUILDING 1000 TON YK YORK CENTRIFUGAL CHILLER LUBE OIL PUMP.	\$17,380.00	\$17,380.00	2015	12/8/2014	SS001550043		0	OTHER THAN SMALL BUSINESS
MARK J SCHWAGER	VE EXPRESS REPORTING IGF::CT::IGF	\$17,338.00	\$17,338.00	2015	9/30/2015	2015	SS11511180047	0	SMALL BUSINESS
ORFEI, CRISTINA	MEDICAL CONSULTANT SERVICES DR. CHRISTINA ORFEI IGF::CL::IGF	\$17,335.60	\$17,335.60	2016	3/15/2016	1	SS05164C034	0	SMALL BUSINESS
PLATIA, EDWARD V	ME EXPRESS REPORTING - MENTAL HEALTH IGF::CT::IGF	\$17,280.00	\$17,280.00	2015	9/30/2015	2015	SS10111100033	0	SMALL BUSINESS
WEIFORD CASE MANAGEMENT	VE EXPRESS REPORTING IGF::CT::IGF	\$17,242.00	\$17,242.00	2015	9/30/2015	2015	SS11521100093	0	SMALL BUSINESS
TITANJI, RUDOLF	IGF::CL::IGF OMA MEDICAL CONSULTANTS. REVIEWS BY MEDICAL CONSULTANT OF DISABILITY CLAIM CASE FILES FOR AGENCY DISABILITY PROGRAM. MODIFICATION TO ADD CASE REVIEWS.	\$17,200.00	\$17,200.00	2016	9/27/2016	1	SS00164C047	1	SMALL BUSINESS
BRONSTEIN MD, HOWARD D.	IGF::CL::IGF OMA MEDICAL CONSULTANTS. REVIEWS BY MEDICAL CONSULTANT OF DISABILITY CLAIM CASE FILES FOR AGENCY DISABILITY PROGRAM. ADDING CASE REVIEWS.	\$17,200.00	\$17,200.00	2016	9/1/2016	1	SS00164C005	1	SMALL BUSINESS
ORDMAN INTEGRATIVE HEALTH SERVICES, L.L.C.	OMA MEDICAL CONSULTANTS. REVIEWS BY MEDICAL CONSULTANT OF DISABILITY CLAIM CASE FILES FOR AGENCY DISABILITY PROGRAM. ADDING NON-CASE SERVICES (AND/OR CASE REVIEWS AS APPLICABLE). IGF::CL::IGF	\$17,200.00	\$17,200.00	2016	9/6/2016	1	SS00164C036	1	SMALL BUSINESS
ROBERT FRANKLIN DRAPER, JR., M.D., P.A.	OMA MEDICAL CONSULTANTS. REVIEWS BY MEDICAL CONSULTANT OF DISABILITY CLAIM CASE FILES FOR AGENCY DISABILITY PROGRAM. MODIFICATION TO ADD CASE REVIEWS. IGF::CL::IGF	\$17,200.00	\$17,200.00	2016	9/28/2016	1	SS00164C060	2	SMALL BUSINESS
VAN VLEET, RUTH	VE EXPRESS REPORTING IGF::CT::IGF	\$17,176.00	\$17,176.00	2015	9/30/2015	2015	SS10881190107	0	SMALL BUSINESS
CHOICES VOCATIONAL REHABILITATION	VE EXPRESS REPORTING IGF::CT::IGF	\$17,171.00	\$17,171.00	2015	9/30/2015	2015	SS10881190267	0	OTHER THAN SMALL BUSINESS

Sole Source Contracts  
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Vendor Name	Description of Requirement	Action Obligation	Base and All Options Value	Fiscal Year	Date Signed	PO/Delivery Order/Task Order/Call#	Parent Contract	Mod #	Contracting Officers Business Size Selection
	IGF::CL::IGF								
KELLY MD, JAMES M	REGION 9 MEDICAL CONSULTANTS. REVIEWS BY MEDICAL CONSULTANT OF DISABILITY CLAIM CASE FILES FOR AGENCY DISABILITY PROGRAM. CALL ORDER TO AWARD JAMES M. KELLY 200 CASES AND 5 NON-CASE HOURS.	\$17,163.15	\$17,163.15	2016	3/1/2016	1	SS09164C060	0	SMALL BUSINESS
CONROY, DENNIS P	VE EXPRESS REPORTING IGF::CT::IGF	\$17,157.00	\$17,157.00	2015	9/30/2015	2015	SS10541140465	0	SMALL BUSINESS
	IGF::CL::IGF								
EATON CORPORATION	MODIFICATION TO EXERCISE OPTION YEAR TWO AND UPDATE CONTRACT CLAUSES FOR PREVENTIVE MAINTENANCE AGREEMENT FOR UPS AND BATTERY STRINGS FOR THE KANSAS CITY ROCC	\$17,143.83	\$17,143.83	2016	9/9/2016	SS071460001		5	SMALL BUSINESS
	IGF::CL::IGF								
EATON CORPORATION	PREVENTIVE MAINTENANCE AGREEMENT FOR UPS AND BATTERY STRINGS FOR THE KANSAS CITY ROCC	\$17,143.83	\$17,143.83	2015	7/31/2015	SS071460001		3	SMALL BUSINESS
	IGF::CL::IGF								
BUSINESS STAFFING OF AMERICA, INC.	OMA MEDICAL CONSULTANTS. REVIEWS BY MEDICAL CONSULTANT OF DISABILITY CLAIM CASE FILES FOR AGENCY DISABILITY PROGRAM. THIS IS A NEW CALL FOR A NEW BPA SS00-16-4C061 BUSINESS STAFF AMERICA FOR MC SERVICES	\$17,140.00	\$17,140.00	2016	7/15/2016	1	SS00164C061	0	SMALL BUSINESS
BRAWNER ASSOC INC	VE EXPRESS REPORTING IGF::CT::IGF	\$17,115.00	\$17,115.00	2015	9/30/2015	2015	SS10541140215	0	SMALL BUSINESS
FEDERAL PRISON INDUSTRIES INC	NATIONAL COMPUTER CENTER FILTER ORDER	\$17,104.80	\$17,104.80	2015	5/19/2015	SS001550146		0	OTHER THAN SMALL BUSINESS
HERMAN MILLER, INC.	PORTLAND, OR CBT28 ODAR - RECONFIGURATION SYSTE	\$17,073.68	\$17,073.68	2015	2/3/2015	SS001530240		SS001260003	0 OTHER THAN SMALL BUSINESS
LIPETZ, PSY. D, BRUCE D	IGF::CL::IGF CLOSELY ASSOCIATED NEW CALL ORDER FO	\$17,048.00	\$17,048.00	2016	12/22/2015	2	SS08164C014	0	SMALL BUSINESS
LIPETZ, PSY. D, BRUCE D	IGF::CL::IGF CLOSELY ASSOCIATED NON-CASE SERVICE H	\$17,048.00	\$17,048.00	2016	2/19/2016	2	SS08164C014	1	SMALL BUSINESS
HELLER, JUDY	IGF::CL::IGF CLOSELY ASSOCIATED - CALL ORDER FOR II	\$17,000.00	\$17,000.00	2016	7/19/2016	2	SS08154C005	0	SMALL BUSINESS
GREENBERG, ROGER	IGF::CL::IGF CLOSELY ASSOCIATED - CALL ORDER FOR II	\$17,000.00	\$17,000.00	2016	7/28/2016	2	SS08154C007	0	SMALL BUSINESS
KARSHMER, CAROL	IGF::CL::IGF CLOSELY ASSOCIATED - CALL ORDER FOR II	\$17,000.00	\$17,000.00	2016	7/26/2016	2	SS08154C004	0	SMALL BUSINESS
BLUE TECH INC.	RENEW MAINTENANCE FOR NTPS SAN 64-BIT SOFTWARE	\$17,000.00	\$17,000.00	2015	5/5/2015	SS001550136		0	SMALL BUSINESS
HERMAN MILLER, INC.	UPPER DARBY, PA #X243 SYSTEMS FURNITURE CONTRA	\$16,997.08	\$16,997.08	2016	9/15/2016	SS001630803		SS001260003	0 OTHER THAN SMALL BUSINESS
DPC CONSULTING LLC	IGF::CL::IGF MEDICAL CONSULTANT SERVICES TO REVIEW	\$16,962.00	\$16,962.00	2017	11/25/2016	5	SS041540002	0	SMALL BUSINESS
COYLE PHD, ROBERT T	IGF::CL::IGF MEDICAL CONSULTANT SERVICES TO REVIEW	\$16,962.00	\$16,962.00	2017	11/23/2016	2	SS04164C003	0	SMALL BUSINESS
CALLINS, W PAUL MD	IGF::CL::IGF MEDICAL CONSULTANT SERVICES TO REVIEW	\$16,962.00	\$16,962.00	2017	11/23/2016	2	SS04164C036	0	SMALL BUSINESS
MONNIG DR, GAYLE D	ME EXPRESS REPORTING - MENTAL HEALTH IGF::CT::IGF	\$16,960.00	\$16,960.00	2015	9/30/2015	2015	SS10781160100	0	SMALL BUSINESS
DALY, BRIAN JOHN	VE EXPRESS REPORTING IGF::CT::IGF	\$16,959.00	\$16,959.00	2015	9/30/2015	2015	SS10251320039	0	SMALL BUSINESS
GIAO HOANG MD	ME EXPRESS REPORTING - MENTAL HEALTH IGF::CT::IGF	\$16,930.00	\$16,930.00	2015	9/30/2015	2015	SS10781460005	0	SMALL BUSINESS
BURNHILL, DAVID A	VE EXPRESS REPORTING IGF::CT::IGF	\$16,899.00	\$16,899.00	2015	9/30/2015	2015	SS10381130115	0	SMALL BUSINESS
	DATA EXCHANGE CHARGES FOR ACCESS TO MONTANA STATE RECORDS ONLINE USED TO VERIFY SSA CLAIMANTS RECORDS.								
LABOR AND INDUSTRY, MONTANA DEPARTMENT OF	IGF::CL::IGF CLOSELY ASSOCIATED	\$16,893.36	\$16,893.36	2016	8/10/2016	SS081650002		0	OTHER THAN SMALL BUSINESS
	IGF::OT::IGF OTHER FUNCTIONS								
GEORGIA, DEPARTMENT OF PUBLIC HEALTH	GEORGIA RECEIPT OF ELECTRONIC DEATH RECORDS FOR OPTION YEAR III PERIOD OF PERFORMANCE JANUARY 1, 2015 - JANUARY 31, 2015.	\$16,873.85	\$16,873.85	2015	12/29/2014	4	SS001260021	0	OTHER THAN SMALL BUSINESS
REPLIWEB, INC.	MAINTAIN ATTUNITY REPLIWEB SOFTWARE	\$16,777.80	\$16,777.80	2015	6/29/2015	SS001550180		0	SMALL BUSINESS
PLOWMAN MD, D L	ME EXPRESS REPORTING - MENTAL HEALTH IGF::CT::IGF	\$16,730.00	\$16,730.00	2015	9/30/2015	2015	SS10781160042	0	SMALL BUSINESS
SMITH, SHANNON	VE EXPRESS REPORTING IGF::CT::IGF	\$16,727.00	\$16,727.00	2015	9/30/2015	2015	SS10631350013	0	SMALL BUSINESS
BRILL, ROBERT M	IGF::CL::IGF CLOSELY ASSOCIATED - NEW CALL ORDER I	\$16,720.00	\$16,720.00	2016	12/21/2015	1	SS08164C004	0	SMALL BUSINESS
JAMES RICHARD ENGELKES	ME EXPRESS REPORTING - MENTAL HEALTH IGF::CT::IGF	\$16,690.00	\$16,690.00	2015	9/30/2015	2015	SS10631150267	0	SMALL BUSINESS

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Vendor Name	Description of Requirement	Action Obligation	Base and All Options Value	Fiscal Year	Date Signed	PO/Delivery Order/Task Order/Call#	Parent Contract	Mod #	Contracting Officers Business Size Selection
MARIE T TURNER DR	IGF::CL::IGF CLOSELY ASSOCIATED CALL ORDER 0011 FOR 211 DISABILITY INDEPENDENT CASE REVIEWS FOR THE PERIOD 1/25/2016 - 3/31/2016. THE RATE OF PAY PER CASE IS \$79.07, @211 CASES EQUALS \$16,683.77 FOR THE PERIOD OF PERFORMANCE.	\$16,683.77	\$16,683.77	2016	1/14/2016	11	SS011140013	0	SMALL BUSINESS
MILTON FREEDMAN MD, INTERNAL MEDICINE	IGF::CL::IGF MEDICAL CONSULTANT SERVICES TO REVIEW	\$16,680.00	\$16,680.00	2016	8/31/2016	3	SS04164C040	0	SMALL BUSINESS
DANIEL J HENNESSY LLC	IGF::CL::IGF MODIFICATION TO ADD CASES AND EXTEND	\$16,680.00	\$16,680.00	2016	6/23/2016	4	SS041440003	2	SMALL BUSINESS
HOM, CYNTHIA MD	IGF::CL::IGF BLANKET PURCHASE AGREEMENTS FOR CONTRACTORS TO PROVIDE REGIONAL MEDICAL CONSULTANT SERVICES FOR THE SOCIAL SECURITY ADMINISTRATION. REVIEWS BY MEDICAL CONSULTANT OF DISABILITY CLAIM CASE FILES FOR AGENCY DISABILITY PROGRAM. MODIFICATION TO ADD CASES AND EXTEND THE PERIOD OF PERFORMANCE.	\$16,680.00	\$16,680.00	2016	7/31/2016	1	SS09164C026	1	SMALL BUSINESS
DEPARTMENT OF HEALTH MINNESOTA	ELECTRONIC DEATH REGISTRATION MINNESOTA THE PURPOSE OF MODIFICATION NUMBER 5 IS TO EXERCISE OPTION YEAR IV TO EXTEND THE TERM OF THE CONTRACT FROM JANUARY 1, 2016 THROUGH DECEMBER 31, 2016 FOR RECEIPT OF ELECTRONIC DEATH RECORDS.	\$0.00	\$16,650.00	2016	12/3/2015	SS001260024		5	OTHER THAN SMALL BUSINESS
HERMAN MILLER, INC.	NAPLES, FL YC18, DESIGN, INSTALL AND PRODUCT FOR S	\$16,646.70	\$16,646.70	2015	8/25/2015	SS001530886	SS001260003	0	OTHER THAN SMALL BUSINESS
ROBINSON, HERMONA C	ME EXPRESS REPORTING - MENTAL HEALTH IGF::CT::IGF	\$16,644.00	\$16,644.00	2015	9/30/2015	2015	SS10631150175	0	SMALL BUSINESS
TERRILL & ASSOCIATES INC	VE EXPRESS REPORTING IGF::CT::IGF	\$16,643.00	\$16,643.00	2015	9/30/2015	2015	SS10691470010	0	SMALL BUSINESS
UNITED STATES POSTAL SERVICE	POST OFFICE BOX RENTAL RENEWAL. THE PURPOSE OF T	\$16,640.00	\$16,640.00	2016	6/2/2016	SS031650006		0	OTHER THAN SMALL BUSINESS
UNITED STATES POSTAL SERVICE	THE PURPOSE OF THIS MODIFICATION IS TO CHANGE TH	\$16,640.00	\$16,640.00	2016	7/12/2016	SS031650006		2	OTHER THAN SMALL BUSINESS
VOCRESOURCES LLC	VE EXPRESS REPORTING IGF::CT::IGF	\$16,607.00	\$16,607.00	2015	9/30/2015	2015	SS10381130271	0	SMALL BUSINESS
ESKINAZI, VICTORIA	ME EXPRESS REPORTING - MENTAL HEALTH IGF::CT::IGF	\$16,600.00	\$16,600.00	2015	9/30/2015	2015	SS10631150050	0	SMALL BUSINESS
MICHAEL J GUCKENBERG	ME EXPRESS REPORTING - MENTAL HEALTH IGF::CT::IGF	\$16,588.00	\$16,588.00	2015	9/30/2015	2015	SS10631150287	0	SMALL BUSINESS
ALKA BISHNOI MD	IGF::CL::IGF REGION 2 MEDICAL CONSULTANTS. REVIEWS BY MEDICAL CONSULTANT OF DISABILITY CLAIM CASE FILES FOR AGENCY DISABILITY PROGRAM.	\$16,568.00	\$16,568.00	2016	4/15/2016	1	SS02164C001	1	SMALL BUSINESS
LOCUM, INC.	IGF::CL::IGF CLOSELY ASSOCIATED - CALL ORDER FOR T	\$16,560.00	\$16,560.00	2016	8/2/2016	1	SS07164C014	0	SMALL BUSINESS
DEMETRI W DRES	ME EXPRESS REPORTING - MENTAL HEALTH IGF::CT::IGF	\$16,550.00	\$16,550.00	2015	9/30/2015	2015	SS10631150048	0	SMALL BUSINESS
BRENNER, ANNE MANON MD	IGF::CL::IGF CLOSELY ASSOCIATED-NEW CALL ORDER M	\$16,534.00	\$16,534.00	2016	12/21/2015	3	SS08164C002	0	SMALL BUSINESS
HERMAN MILLER, INC.	IE29 WEST SACRAMENTO, CA - SYSTEMS FURNITURE - TC	\$16,524.70	\$16,524.70	2015	12/12/2014	SS001530158	SS001260003	0	OTHER THAN SMALL BUSINESS
HICKEY, RICHARD J.	VE EXPRESS REPORTING IGF::CT::IGF	\$16,451.00	\$16,451.00	2015	9/30/2015	2015	SS10541140365	0	SMALL BUSINESS
WHITE MD, ALEXANDER B	ME EXPRESS REPORTING - MENTAL HEALTH IGF::CT::IGF	\$16,440.00	\$16,440.00	2015	9/30/2015	2015	SS10881190134	0	SMALL BUSINESS
BOLDEN, KIELA	IGF::CL::IGF CLOSELY ASSOCIATED - REGIONAL MEDICAL	\$16,423.20	\$16,423.20	2015	9/28/2015	1	SS05154C003	0	SMALL BUSINESS
LATCHAMSETTY, SWARAJYALAKSHMI	MEDICAL CONSULTANT SERVICES DR. SWARAJYALAKSHMI LATCHAMSETTY IGF::CL::IGF	\$16,423.20	\$16,423.20	2016	3/14/2016	1	SS05164C016	0	SMALL BUSINESS
MARVA P DAWKINS PHD	THIS IS TO FUND A NEW CALL ORDER FOR INDEPENDENT CASE REVIEWS AGAINST SS05-16-4C009, CALL ORDER 2, DR MARVA DAWKINS IGF::CL::IGF	\$16,423.20	\$16,423.20	2016	6/28/2016	2	SS05164C009	0	SMALL BUSINESS
HARRIS M.D., MAURICE	IGF::CL::IGF MEDICAL CONSULTANT SERVICES - PHYSICAL CASES	\$16,402.00	\$16,402.00	2016	11/6/2015	14	SS041140036	0	SMALL BUSINESS
AURELIUS SMITH, RICHARD, M.D.	MEDICAL CONSULTANT - PHYSICAL CASES CLOSELY ASSOCIATED TO INHERENTLY GOVERNEMENTAL FUNCTION IGF::CL::IGF FOR CLOSELY ASSOCIATED	\$16,402.00	\$16,402.00	2015	1/12/2015	13	SS041140047	0	SMALL BUSINESS
AURELIUS SMITH, RICHARD, M.D.	MEDICAL CONSULTANT - PHYSICAL CASES CLOSELY ASSOCIATED TO INHERENTLY GOVERNEMENTAL FUNCTION IGF::CL::IGF FOR CLOSELY ASSOCIATED	\$16,402.00	\$16,402.00	2015	3/31/2015	13	SS041140047	1	SMALL BUSINESS

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Vendor Name	Description of Requirement	Action Obligation	Base and All Options Value	Fiscal Year	Date Signed	PO/Delivery Order/Task Order/Call#	Parent Contract	Mod #	Contracting Officers Business Size Selection
COYLE PHD, ROBERT T	MEDICAL CONSULTANT SERVICES - MENTAL CASES CLOSELY ASSOCIATED TO INHERENTLY GOVERNMENTAL FUNCTION IGF::CL::IGF	\$16,402.00	\$16,402.00	2015	2/24/2015	10	SS041140068	0	SMALL BUSINESS
M. JANE YATES, PH.D., P.C.	MEDICAL CONSULTANT SERVICES - NON CASE SERVICES CLOSELY ASSOCIATED TO INHERENTLY GOVERNMENTAL FUNCTION IGF::CL::IGF FOR CLOSELY ASSOCIATED	\$16,402.00	\$16,402.00	2015	2/24/2015	17	SS041140066	0	SMALL BUSINESS
M. JANE YATES, PH.D., P.C.	MEDICAL CONSULTANT SERVICES - NON CASE SERVICES CLOSELY ASSOCIATED TO INHERENTLY GOVERNMENTAL FUNCTION IGF::CL::IGF FOR CLOSELY ASSOCIATED	\$16,402.00	\$16,402.00	2015	6/23/2015	17	SS041140066	1	SMALL BUSINESS
THOMAS S ROWE MD	MEDICAL CONSULTANT SERVICES - PHYSICAL CASES IGF::CL::IGF	\$16,402.00	\$16,402.00	2015	12/16/2014	17	SS041140049	0	SMALL BUSINESS
THOMSON, THOMAS	MEDICAL CONSULTANTS CONTRACTS - PHYSICAL CASES CLOSELY ASSOCIATED TO INHERENTLY GOVERNMENTAL FUNCTION IGF::CL::IGF	\$16,402.00	\$16,402.00	2015	12/15/2014	12	SS041140027	0	SMALL BUSINESS
THOMSON, THOMAS	MEDICAL CONSULTANTS CONTRACTS - PHYSICAL CASES CLOSELY ASSOCIATED TO INHERENTLY GOVERNMENTAL FUNCTION IGF::CL::IGF	\$16,402.00	\$16,402.00	2015	4/27/2015	12	SS041140027	2	SMALL BUSINESS
DARRELL R CAUDILL M D	MEDICAL CONTRACTING SERVICES - PHYSICAL CASES CLOSELY ASSOCIATED TO INHERENTLY GOVERNMENTAL FUNCTION IGF::CL::IGF	\$16,402.00	\$16,402.00	2015	6/1/2015	11	SS041140035	2	SMALL BUSINESS
UPCHURCH, JAMES C	MEDICAL CONTRACTOR SERVICES - PHYICAL CASES CLOSELY ASSOCIATED TO INHERENTLY GOVERNMENTAL FUNCTION IGF::CL::IGF FOR CLOSELY ASSOCIATED	\$16,402.00	\$16,402.00	2015	12/15/2014	14	SS041140026	0	SMALL BUSINESS
BLANKSON, MARY	MEDICAL CONTRACTOR SERVICES - PHYSICAL CASES CLOSELY ASSOCIATED TO INHERENTLY GOVERNMENTAL FUNCTION IGF::CL::IGF	\$16,402.00	\$16,402.00	2015	1/12/2015	8	SS041140032	0	SMALL BUSINESS
PERRY M WHITE	MEDICAL CONTRACTOR SERVICES - PHYSICAL CASES IGF::CL::IGF	\$16,402.00	\$16,402.00	2015	12/11/2014	12	SS041140054	0	SMALL BUSINESS
HERBERT KUSHNER	DR. KUSHNER MODIFICATION TO ADD CASES SS00-11-40079  IGF::CT::IGF	\$16,400.00	\$16,400.00	2015	1/14/2015	6	SS001140079	0	SMALL BUSINESS
DANIEL R MALONE	DR. MALONE MODIFICATION TO ADD CASES SS00-11-40073  IGF::CT::IGF	\$16,400.00	\$16,400.00	2015	1/13/2015	6	SS001140073	0	SMALL BUSINESS
JACOB TENDLER MD	DR. TENDLER MODIFICATION TO ADD CASES SS00-11-40032  IGF::CT::IGF	\$16,400.00	\$16,400.00	2015	4/23/2015	6	SS001140032	1	SMALL BUSINESS

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Vendor Name	Description of Requirement	Action Obligation	Base and All Options Value	Fiscal Year	Date Signed	PO/Delivery Order/Task Order/Call#	Parent Contract	Mod #	Contracting Officers Business Size Selection
	DR. UNGER MODIFICATION TO ADD CASES SS00-11-40027								
UNGER MD, H THOMAS	IGF::CT::IGF	\$16,400.00	\$16,400.00	2015	1/13/2015	7	SS001140027	0	SMALL BUSINESS
CIDDIO-MORRIS ASSOCIATES INC	VE EXPRESS REPORTING IGF::CT::IGF	\$16,383.00	\$16,383.00	2015	9/30/2015	2015	SS10881190047	0	SMALL BUSINESS
	IGF::CL::IGF REGION 2 MEDICAL CONSULTANTS. REVIEWS BY MEDICAL CONSULTANT OF DISABILITY CLAIM CASE FILES FOR AGENCY DISABILITY PROGRAM.	\$16,324.00	\$16,324.00	2016	4/19/2016	3	SS021440024	1	SMALL BUSINESS
PAZ, ANNETTE DE									
	IGF::CL::IGF REGION 2 MEDICAL CONSULTANTS. REVIEWS BY MEDICAL CONSULTANT OF DISABILITY CLAIM CASE FILES FOR AGENCY DISABILITY PROGRAM. MODIFICATION TO INCREASE QUANTITY.	\$16,319.58	\$16,324.00	2015	9/23/2015	5	SS021240003	2	SMALL BUSINESS
THE AXON GROUP									
	THIS IS A MODIFICATION TO ADD INDEPENDENT CASE REVIEWS TO THE CALL ORDER #0008. THE REGION II RMC EVALUATES MEDICAL EVIDENCE FOR TITLE II AND TITLE XVI DISABILITY CLAIMS. REVIEWS. IGF::CL::IGF	\$16,324.00	\$16,324.00	2016	1/5/2016	8	SS021140072	3	SMALL BUSINESS
CAMPION MD, ROBERT									
	THIS IS A MODIFICATION TO ADD INDEPENDENT CASE REVIEWS TO THE EXISTING CALL ORDER #0008. DUE TO ADDITIONAL WORKLOAD, IT IS NECESSARY TO INCREASE EXISTING CALL ORDER FOR THIS RMC. THE REGION II RMC EVALUATES MEDICAL EVIDENCE FOR TITLE II AND TITLE XVI DISABILITY CLAIMS. REVIEWS. IGF::CL::IGF	\$16,324.00	\$16,324.00	2015	9/21/2015	8	SS021140072	2	SMALL BUSINESS
CAMPION MD, ROBERT									
COVERBIND CORPORATION	COVERBIND 9000 BINDING BINDING MACHINE THAT INC	\$16,321.40	\$16,321.40	2015	7/23/2015	SS001550225		0	SMALL BUSINESS
	ELECTRONIC DEATH REGISTRATION NORTH DAKOTA THE PURPOSE OF MODIFICATION NUMBER 6 IS TO EXERCISE OPTION YEAR IV TO EXTEND THE TERM OF THE CONTRACT FROM JANUARY 1, 2016 THROUGH DECEMBER 31, 2016 FOR RECEIPT OF ELECTRONIC DEATH RECORDS.	\$0.00	\$16,258.50	2016	12/3/2015	SS001260046		6	OTHER THAN SMALL BUSINESS
HEALTH, NORTH DAKOTA DEPARTMENT OF									
	ELECTRONIC DEATH REGISTRATION - MINNESOTA THE PURPOSE OF MODIFICATION NUMBER 4 IS TO EXERCISE OPTION YEAR THREE TO EXTEND THE TERM OF THE CONTRACT FROM JANUARY 1, 2015 THROUGH DECEMBER 31, 2015 FOR RECEIPT OF ELECTRONIC DEATH RECORDS.	\$0.00	\$16,230.00	2015	12/17/2014	SS001260024		4	OTHER THAN SMALL BUSINESS
DEPARTMENT OF HEALTH MINNESOTA									
VOCATIONAL DYNAMICS LLC	VE EXPRESS REPORTING IGF::CT::IGF	\$16,225.00	\$16,225.00	2015	9/30/2015	2015	SS11501110021	0	SMALL BUSINESS
VOCATIONAL ECONOMICS INC	VE EXPRESS REPORTING IGF::CT::IGF	\$16,218.00	\$16,218.00	2015	9/30/2015	2015	SS10881290012	0	OTHER THAN SMALL BUSINESS
GERALD SHUGOLL MD	ME EXPRESS REPORTING - MENTAL HEALTH IGF::CT::IGF	\$16,200.00	\$16,200.00	2015	9/30/2015	2015	SS10111100041	0	SMALL BUSINESS
PCMG, INC.	RED GIANT ADOBE SOFTWARE PLUG-IN WILL ALLOW THE	\$16,195.95	\$16,195.95	2016	8/2/2016	SS001650198		0	OTHER THAN SMALL BUSINESS
	IGF::CL::IGF CLOSELY ASSOCIATED IN SS00-12-60035 ELECTRONIC DEATH REGISTRATION DELIVERY ORDER. 5,832 EDR RECORDS TOTAL DELIVERY ORDER \$16,185.38.00. PERIOD OF PERFORMANCE 1/01/2016 - 1/31/2016.	\$16,185.38	\$16,185.38	2016	12/23/2015	5	SS001260035	0	OTHER THAN SMALL BUSINESS
HEALTH, INDIANA DEPARTMENT OF									
	IGF::CL::IGF DIANA SHEARER, MC NEW CALL ORDER TO ADD INDEPENDENT CASE REVIEWS	\$16,160.40	\$16,160.40	2016	1/20/2016	2	SS10154C010	0	SMALL BUSINESS
SHEARER, DIANA N									
SHERMAN MD, LAWRENCE	ME EXPRESS REPORTING - MENTAL HEALTH IGF::CT::IGF	\$16,130.00	\$16,130.00	2015	9/30/2015	2015	SS10881390024	0	SMALL BUSINESS
	RENEWL WBDO POST OFFICE BOXES FOR 1 YEAR FROM 7/1/2015 TO 6/30/2016- POST OFFICE BOXES CRITICAL TO WBDOC COMPONENT'S WORKLOAD. IGF::CL::IGF	\$16,120.00	\$16,120.00	2015	6/1/2015	SS031550011		0	OTHER THAN SMALL BUSINESS
UNITED STATES POSTAL SERVICE									



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Vendor Name	Description of Requirement	Action Obligation	Base and All Options Value	Fiscal Year	Date Signed	PO/Delivery Order/Task Order/Call#	Parent Contract	Mod #	Contracting Officers Business Size Selection
HEALTH AND SENIOR SERVICES, MISSOURI DEPARTMENT OF	ELECTRONIC DEATH REGISTRATION MISSOURI THE PURPOSE OF MODIFICATION NUMBER 5 IS TO EXERCISE OPTION YEAR IV TO EXTEND THE TERM OF THE CONTRACT FROM JANUARY 1, 2016 THROUGH DECEMBER 31, 2016 FOR RECEIPT OF ELECTRONIC DEATH RECORDS.	\$0.00	\$16,095.00	2016	12/10/2015	SS001260026		5	OTHER THAN SMALL BUSINESS
SABREE, INC.	REMOVAL OF ASBESTOS TILE, CARPET TILE AND ASSOCIATED MASTIC, FLOORING ADHESIVE. OPTION PERIOD TWO PRICING.								
IGF::OT::IGF		\$16,093.69	\$16,093.69	2016	9/29/2016	SS001630855	SS001461113	0	SMALL BUSINESS
RE-EMPLOYMENT RESOURCES, L.C.	VE EXPRESS REPORTING IGF::CT::IGF	\$16,033.00	\$16,033.00	2015	9/30/2015	2015	SS10781160179	0	SMALL BUSINESS
SCHNIEWIND JR MD, HENRY	IGF::CL::IGF PURCHASE AGREEMENT FOR REGIONAL ME	\$16,028.00	\$16,028.00	2017	11/14/2016	2	SS01164C031	0	SMALL BUSINESS
EASTMAN KODAK COMPANY	KODAK VERSAMARK FV5003 20L JUG, BLACK INK FOR KO	\$16,000.00	\$16,000.00	2016	8/24/2016	SS001650239		0	OTHER THAN SMALL BUSINESS
ADAPTAVIST.COM LTD	THIS IS FOR THE PURCHASE OF 2000 ATLIASSIAN CONFLU	\$16,000.00	\$16,000.00	2015	8/7/2015	SS001550250		0	SMALL BUSINESS
IGF::CL::IGF									
ELLIOTT J GOYTIA, MD, MA	REGION 2 MEDICAL CONSULTANTS. REVIEWS BY MEDICAL CONSULTANT OF DISABILITY CLAIM CASE FILES FOR AGENCY DISABILITY PROGRAM. INCREASE QUANTITY OF CASE REVIEWS.	\$15,915.90	\$15,915.90	2015	9/25/2015	12	SS021140083	2	SMALL BUSINESS
DAYTNER CORPORATION, THE	IGF::OT::IGF NCC MEANDERING STREAM PROJECT TO AMEND THE LANDSCAPING RENOVATION OF THE MEANDERING STREAM TO PREVENT FURTHER EROSION OF THE TOPOGRAPHIC FLOODPLAIN AREA	\$15,811.00	\$15,811.00	2017	11/10/2016	SS001750025		0	SMALL BUSINESS
IGF::OT::IGF									
CAGE CODE: 4KUQ1									
SABREE, INC.	REMOVE APPROXIMATELY 150 SQUARE FEET OF ASBESTOS-CONTAINING FLOOR TILE AND MASTIC IN THE WEST HIGH RISE BUILDING, PLUMBING SHOP	\$15,797.34	\$15,797.34	2015	9/24/2015	SS001531002	SS001461113	0	SMALL BUSINESS
IGF::OT::IGF OTHER FUNCTIONS									
INDIANA RECEIPT OF ELECTRONIC DEATH RECORDS (EDR) OPTION YEAR III PERIOD OF PERFORMANCE									
JANUARY 1, 2015 - JANUARY 31, 2015.		\$15,778.65	\$15,778.65	2015	12/29/2014	4	SS001260035	0	OTHER THAN SMALL BUSINESS
HEALTH, INDIANA DEPARTMENT OF	RENEWAL OF MAINTENANCE ON ULTRABAC SOFTWARE	\$15,750.00	\$15,750.00	2016	3/14/2016	SS001650084		0	SMALL BUSINESS
BARRATT EDWARDS INTERNATIONAL CORPORATION									
MEDICAL CONSULTANT SERVICES - PHYSICAL CASES CLOSELY ASSOCIATED TO INHERENTLY GOVERNMENTAL FUNCTION									
RICHMOND, JOISANNE	IGF::CL::IGF	\$15,695.00	\$15,695.00	2015	3/31/2015	10	SS041140045	1	SMALL BUSINESS
MORRISON MD, KENDRICK O	ME EXPRESS REPORTING - MENTAL HEALTH IGF::CT::IGF	\$15,690.00	\$15,690.00	2015	9/30/2015	2015	SS11511180022	0	SMALL BUSINESS
ELECTRONIC DEATH REGISTRATION - MISSOURI. THE PURPOSE OF MODIFICATION NUMBER 4 IS TO EXERCISE OPTION YEAR THREE TO EXTEND THE TERM OF THE CONTRACT FROM JANUARY 1, 2015 THROUGH DECEMBER 31, 2015 FOR RECEIPT OF ELECTRONIC DEATH RECORDS.		\$0.00	\$15,689.00	2015	12/8/2014	SS001260026		4	OTHER THAN SMALL BUSINESS
HEALTH AND SENIOR SERVICES, MISSOURI DEPARTMENT OF	IGF::OT::IGF THE PURPOSE OF MODIFICATION 004 IS TO	\$15,653.00	\$15,653.00	2016	9/22/2016	SS001650137		4	OTHER THAN SMALL BUSINESS
FIRE & LIFE SAFETY AMERICA, INC.	ME EXPRESS REPORTING - MENTAL HEALTH IGF::CT::IGF	\$15,650.00	\$15,650.00	2015	9/30/2015	2015	SS10631150228	0	OTHER THAN SMALL BUSINESS
STEVENS BERNARD	IGF::CL::IGF CLOSELY ASSOCIATED - CALL ORDER FOR C	\$15,600.00	\$15,600.00	2016	7/25/2016	2	SS08164C006	0	SMALL BUSINESS
FLATIRONS MEDICAL CONSULTANTS, LLC.									

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Vendor Name	Description of Requirement	Action Obligation	Base and All Options Value	Fiscal Year	Date Signed	PO/Delivery Order/Task Order/Call#	Parent Contract	Mod #	Contracting Officers Business Size Selection	
PRESTO, JOSEPH	IGF::CL::IGF REGION 2 MEDICAL CONSULTANTS. REVIEWS BY MEDICAL CONSULTANT OF DISABILITY CLAIM CASE FILES FOR AGENCY DISABILITY PROGRAM. MODIFICATION TO INCREASE QUANTITY AND EXTEND PERFORMANCE.	\$15,600.00	\$15,600.00	2015	4/15/2015	5	SS021240002	0	SMALL BUSINESS	
INTERGRAL INFORMATION SOLUTIONS GMBH	MAINTENANCE ON FUSION PRODUCTS	\$15,579.00	\$15,579.00	2016	5/13/2016	SS001650126		0	SMALL BUSINESS	
DLT SOLUTIONS INCORPORATED	EXERCISE AN OPTION FOR THE PERIOD JANUARY 1, 2016	\$15,577.27	\$15,577.27	2016	2/5/2016	SS001431684	W91QUZ06A0004	4	SMALL BUSINESS	
CONROE, HENRY DR MD SC	REGION 05 MEDICAL ADVISOR. REVIEWS BY MEDICAL ADVISOR OF DISABILITY CLAIM CASE FILES FOR AGENCY DISABILITY PROGRAM. NEW CALL ORDER FOR ORIENTATION HOURS AND INDEPENDENT CASE REVIEWS. IGF::CL::IGF	\$15,574.50	\$15,574.50	2016	9/16/2016	4	SS05164C029	0	SMALL BUSINESS	
TCG PROPERTY CORPORATION	IGF::OT::IGF - MECHANICAL MAINTENANCE, CUSTODIAL,	\$15,507.80	\$15,507.80	2015	9/17/2015	SS001461112		2	SMALL BUSINESS	
NORCON COMMUNICATIONS INC	TO PURCHASE WIRELESS HEADSETS TO USE WITH THE N	\$15,450.49	\$15,450.49	2016	7/18/2016	SS021650032		0	SMALL BUSINESS	
HEALTH, NORTH DAKOTA DEPARTMENT OF	ELECTRONIC DEATH REGISTRATION - NORTH DAKOTA THE PURPOSE OF MODIFICATION NUMBER 4 IS TO EXERCISE OPTION YEAR THREE TO EXTEND THE TERM OF THE CONTRACT FROM JANUARY 1, 2015 THROUGH DECEMBER 31, 2015 FOR RECEIPT OF ELECTRONIC DEATH RECORDS.	\$0.00	\$15,418.50	2015	12/30/2014	SS001260046		4	OTHER THAN SMALL BUSINESS	
JOHNSON CONTROLS, INC.	THE MAIN SHAFT SEAL ON CHILLER #1 IN THE NCC'S UTIL	\$15,413.00	\$15,413.00	2016	4/26/2016	SS001650111		0	OTHER THAN SMALL BUSINESS	
PAWLARCZYK PHD, DOUGLAS	ME EXPRESS REPORTING - MENTAL HEALTH IGF::CT::IGF	\$15,390.00	\$15,390.00	2015	9/30/2015	2015	SS10631150322		0	OTHER THAN SMALL BUSINESS
PSYCHOLOGICAL HEALTH SERVICES P C	VE EXPRESS REPORTING IGF::CT::IGF	\$15,360.00	\$15,360.00	2015	9/30/2015	2015	SS11511180016	0	SMALL BUSINESS	
LINDA WILLIAMS CONSULTING	VE EXPRESS REPORTING IGF::CT::IGF	\$15,321.30	\$15,321.30	2015	9/30/2015	2015	SS10541140681	0	SMALL BUSINESS	
EVANS, SUSAN P MRC	VE EXPRESS REPORTING IGF::CT::IGF	\$15,301.68	\$15,301.68	2015	9/30/2015	2015	SS10541440041	0	OTHER THAN SMALL BUSINESS	
GRAND, SHARON	ME EXPRESS REPORTING - MENTAL HEALTH IGF::CT::IGF	\$15,290.00	\$15,290.00	2015	9/30/2015	2015	SS10251120088	0	SMALL BUSINESS	
BRUST, MATILDA MD	ME EXPRESS REPORTING - MENTAL HEALTH IGF::CT::IGF	\$15,260.00	\$15,260.00	2015	9/30/2015	2015	SS10251120108	0	SMALL BUSINESS	
OWEN VOCATIONAL SERVICES	VE EXPRESS REPORTING IGF::CT::IGF	\$15,242.00	\$15,242.00	2015	9/30/2015	2015	SS10781160101	0	SMALL BUSINESS	
BERKOWITZ, MARK PSY D	IGF::CL::IGF CLOSELY ASSOCIATED NEW CALL ORDER F	\$15,200.00	\$15,200.00	2016	12/17/2015	2	SS08164C001	0	SMALL BUSINESS	
OLIVARES, RAFAEL J	IGF::CL::IGF CLOSELY ASSOCIATED -NEW CALL ORDER INC	\$15,200.00	\$15,200.00	2016	12/18/2015	1	SS08164C018	0	SMALL BUSINESS	
BERKOWITZ, MARK PSY D	IGF::CL::IGF CLOSELY ASSOCIATED - INCREASE INDEPEND	\$15,200.00	\$15,200.00	2016	9/2/2016	4	SS08164C001	1	SMALL BUSINESS	
DONALD N MANGRAVITE MD	ME EXPRESS REPORTING - MENTAL HEALTH IGF::CT::IGF	\$15,170.00	\$15,170.00	2015	9/30/2015	2015	SS10881190080	0	SMALL BUSINESS	
JEFFERY J PETERSON & ASSOCIATES	VE EXPRESS REPORTING IGF::CT::IGF	\$15,168.00	\$15,168.00	2015	9/30/2015	2015	SS10781160081	0	SMALL BUSINESS	
COMCAST CABLE COMMUNICATIONS, LLC	ATLANTA RO - CABLE TV IGF::OT::IGF	\$3,191.20	\$15,160.00	2015	9/30/2015	SS041550035		0	OTHER THAN SMALL BUSINESS	
J BRUCE BURNETT MD	ME EXPRESS REPORTING - MENTAL HEALTH IGF::CT::IGF	\$15,160.00	\$15,160.00	2015	9/30/2015	2015	SS10251220003	0	SMALL BUSINESS	
LOGAN, WILLIAM M	IGF::CL::IGF REGION 6 MEDICAL RMA EXTENSION	\$15,130.00	\$15,130.00	2015	4/22/2015	19	SS061140038	3	SMALL BUSINESS	
LEV PHD, JULIAN	IGF::CL::IGF LEV - CALL ORDER - CASES	\$15,130.00	\$15,130.00	2015	7/16/2015	15	SS061140034	1	SMALL BUSINESS	
MOORE, YONDELL	IGF::CL::IGF MOORE, Y - CALL ORDER - CASES	\$15,130.00	\$15,130.00	2015	7/15/2015	15	SS061140019	1	SMALL BUSINESS	
SABREE, INC.	IGF::OT::IGF  CAGE CODE: 4KUQ1  REMOVE CARPET TILE/FLOOR FROM ROOM L-1110 WEST LOW RISE BUILDING.	\$15,023.71	\$15,023.71	2015	12/10/2014	SS001530123	SS001461113	0	SMALL BUSINESS	
JAY M. TOEWS, INC.	VE EXPRESS REPORTING IGF::CT::IGF	\$15,010.00	\$15,010.00	2015	9/30/2015	2015	SS11521100052	0	SMALL BUSINESS	
EAST BAY MUNICIPL UTILITY DISTR	IGF::CT::IGF CRITICAL FUNCTIONS BUILDING WATER SER	\$15,000.00	\$15,000.00	2015	9/22/2015	SS091551001		1	OTHER THAN SMALL BUSINESS	
HEALTH, WASHINGTON STATE DEPARTMENT OF	IGF::CL::IGF CLOSELY ASSOCIATED ADDING ADDITIONAL FUNDS FOR ELECTRONIC DEATH REGISTRATION FOR WASHINGTON STATE OPTION YEAR II	\$14,998.83	\$14,998.83	2015	3/10/2015	3	SS001260023	1	OTHER THAN SMALL BUSINESS	
KAVJIAN MD, DAVID A	ME EXPRESS REPORTING - MENTAL HEALTH IGF::CT::IGF	\$14,940.00	\$14,940.00	2015	9/30/2015	2015	SS10111100025	0	SMALL BUSINESS	
MCKISICK, STACY L	VE EXPRESS REPORTING IGF::CT::IGF	\$14,940.00	\$14,940.00	2015	9/30/2015	2015	SS10781460006	0	SMALL BUSINESS	

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JOHNSON, FAITH	VE EXPRESS REPORTING IGF::CT::IGF	\$14,928.00	\$14,928.00	2015	9/30/2015	2015	SS11501110079	0	SMALL BUSINESS
SHUTTERSTOCK, INC.	IGF::OT::IGF THIS IS A VIDEO DOWNLOAD SOFTWARE THAT WILL HELP MEET THE ACTING COMMISSIONERS GOAL TO GET MORE COMMUNICATION TO EMPLOYEES. WE USE THIS SOFTWARE FOR INTERNAL AND EXTERNAL VIDEOS	\$14,880.00	\$14,880.00	2015	9/14/2015	SS001550288		0	OTHER THAN SMALL BUSINESS
SHUTTERSTOCK, INC.	IGF::OT::IGF THIS IS A VIDEO DOWNLOAD SOFTWARE THAT WILL HELP MEET THE ACTING COMMISSIONERS GOAL TO GET MORE COMMUNICATION TO EMPLOYEES. WE USE THIS SOFTWARE FOR INTERNAL AND EXTERNAL VIDEOS	\$14,880.00	\$14,880.00	2016	7/5/2016	SS001650166		0	OTHER THAN SMALL BUSINESS
PAZ, ANNETTE DE	IGF::CL::IGF REGION 2 MEDICAL CONSULTANTS. REVIEWS BY MEDICAL CONSULTANT OF DISABILITY CLAIM CASE FILES FOR AGENCY DISABILITY PROGRAM.	\$14,840.00	\$14,840.00	2016	2/17/2016	3	SS021440024	0	SMALL BUSINESS
SCHMIDT VOCATIONAL SERVICES	VE EXPRESS REPORTING IGF::CT::IGF	\$14,771.00	\$14,771.00	2015	9/30/2015	2015	SS11511180117	0	OTHER THAN SMALL BUSINESS
DALTON, CHARLES B	IGF::CL::IGF REGION 2 MEDICAL CONSULTANTS. REVIEWS BY MEDICAL CONSULTANT OF DISABILITY CLAIM CASE FILES FOR AGENCY DISABILITY PROGRAM. INCREASE QUANTITY CASE REVIEWS.	\$14,760.00	\$14,760.00	2016	2/25/2016	1	SS02164C009	1	SMALL BUSINESS
HEALTH AND SENIOR SERVICES, MISSOURI DEPARTMENT OF	IGF::CL::IGF CLOSELY ASSOCIATED MO \$S00-12-60026 ELECTRONIC DEATH REGISTRATION DELIVERY ORDER. 5314 EDR RECORDS TOTAL DELIVERY ORDER \$14,747.14 PERIOD OF PERFORMANCE 1/01/2016 - 1/31/2016.	\$14,747.14	\$14,747.14	2016	12/23/2015	5	SS001260026	0	OTHER THAN SMALL BUSINESS
HERMAN MILLER, INC.	ROLLA, MO (C750) DESIGN, PRODUCT, INSTALLATION, AND MAINTENANCE OF CHILLER PO	\$14,737.58	\$14,737.58	2015	2/23/2015	SS001530283	SS001260003	0	OTHER THAN SMALL BUSINESS
JOHNSON CONTROLS, INC.	EMERGENCY CHILLER PO IGF::CT::IGF	\$14,725.00	\$14,725.00	2015	2/18/2015	SS001550070		0	OTHER THAN SMALL BUSINESS
MENDONCA, ROHINI HILAIRE	IGF::CL::IGF REGION 5 MEDICAL CONSULTANTS. REVIEWS BY MEDICAL CONSULTANT OF DISABILITY CLAIM CASE FILES FOR AGENCY DISABILITY PROGRAM. NEW CALL ORDER FOR INDEPENDENT CASE REVIEWS AGAINST SS05-15-4C005, CALL ORDER 2, DR ROHINI MENDONCA M.D.	\$14,685.00	\$14,685.00	2016	4/1/2016	2	SS05154C005	0	SMALL BUSINESS
GREENBERG , MICHAEL K MD	OMA MEDICAL CONSULTANTS. REVIEWS BY MEDICAL CONSULTANT OF DISABILITY CLAIM CASE FILES FOR AGENCY DISABILITY PROGRAM. AWARDING DR. GREENBERG INDEPENDENT CASE REVIEWS AND NON-CASE SERVICES. IGF::CL::IGF	\$14,625.00	\$14,625.00	2016	5/31/2016	1	SS00164C020	0	SMALL BUSINESS
AMERICAN MEDICAL ASSOCIATION	IGF::OT::IGF AMA GUIDES TO EVALUATION OF PERMANENT IMPAIRMENT SUBSCRIPTION.	\$14,550.00	\$14,550.00	2015	8/13/2015	SS001550238		0	OTHER THAN SMALL BUSINESS
TECHFIRST, INC.	IGF::CT::IGF SIGN LANGUAGE INTERPRETER SERVICES AS A REASONABLE ACCOMMODATION FOR EMPLOYEES WHO ARE DEAF OR HARD OF HEARING	\$14,548.80	\$14,548.80	2016	9/27/2016	SS001650271		0	SMALL BUSINESS
ESVA	RENEWAL OF SS00-15-50149 FOR AXCELER CONTROL PO	\$14,517.24	\$14,517.24	2016	6/30/2016	SS001650158		0	OTHER THAN SMALL BUSINESS
HERMAN MILLER, INC.	PASADENA, CA C957 - RECONFIGURATION OF TWO X3-957	\$14,503.54	\$14,503.54	2016	6/6/2016	SS001630427	SS001260003	0	OTHER THAN SMALL BUSINESS
EASTERN MONTANA COUNSELIN	VE EXPRESS REPORTING IGF::CT::IGF	\$14,485.00	\$14,485.00	2015	9/30/2015	2015	SS11511180029	0	SMALL BUSINESS
B.S. ENVIRONMENTAL, INC.	THE UPS BATTERIES CONTAIN LEAD AND ACID. THESE HAVE BEEN RECYCLED.	\$14,475.00	\$14,475.00	2015	4/9/2015	SS001431944	SS001461041	1	SMALL BUSINESS
ARVIN J KLEIN MD A PROFESSIONAL CORP	ME EXPRESS REPORTING - MENTAL HEALTH IGF::CT::IGF	\$14,450.00	\$14,450.00	2015	9/30/2015	2015	SS10881190056	0	SMALL BUSINESS
DALTON, CHARLES B	IGF::CL::IGF REGION 2 MEDICAL CONSULTANTS. REVIEWS BY MEDICAL CONSULTANT OF DISABILITY CLAIM CASE FILES FOR AGENCY DISABILITY PROGRAM.	\$14,432.00	\$14,432.00	2016	12/31/2015	1	SS02164C009	0	SMALL BUSINESS

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Vendor Name	Description of Requirement	Action Obligation	Base and All Options Value	Fiscal Year	Date Signed	PO/Delivery Order/Task Order/Call#	Parent Contract	Mod #	Contracting Officers Business Size Selection
ENG, WHITNEY	VE EXPRESS REPORTING IGF::CT::IGF	\$14,419.00	\$14,419.00	2015	9/30/2015	2015	SS11501110099	0	SMALL BUSINESS
DAVID C HORN & ASSOCIATES	VE EXPRESS REPORTING IGF::CT::IGF	\$14,407.00	\$14,407.00	2015	9/30/2015	2015	SS10541140377	0	SMALL BUSINESS
WEINTRAUB, ELIZABETH	IGF::CL::IGF REGION 05 MEDICAL CONSULTANTS. REVIEWS BY MEDICAL CONSULTANT OF DISABILITY CLAIM CASE FILES FOR AGENCY. CALL ORDER FOR ORIENTATION - FORMAL PRESENTATIONS AND CASE REVIEWS.	\$14,400.00	\$14,400.00	2016	9/29/2016	1	SS05164C042	0	SMALL BUSINESS
GREEN-HILL, LISA J	REGION 05 MEDICAL CONSULTANTS. REVIEWS BY MEDICAL CONSULTANT OF DISABILITY CLAIM CASE FILES FOR AGENCY DISABILITY PROGRAM. NEW CALL ORDER FOR ORIENTATION HOURS AND CASE REVIEWS. IGF::CL::IGF	\$14,400.00	\$14,400.00	2016	9/26/2016	1	SS05164C037	0	SMALL BUSINESS
SCHUTT-KINNEAR, KATHRYN	REGION 05 MEDICAL CONSULTANTS. REVIEWS BY MEDICAL CONSULTANT OF DISABILITY CLAIM CASE FILES FOR AGENCY DISABILITY PROGRAM. NEW CALL ORDER FOR ORIENTATION HOURS AND CASE REVIEWS. IGF::CL::IGF	\$14,400.00	\$14,400.00	2016	9/26/2016	1	SS05164C040	0	SMALL BUSINESS
WELLNESS & PSYCHOLOGY LLC	REGION 05 MEDICAL CONSULTANTS. REVIEWS BY MEDICAL CONSULTANT OF DISABILITY CLAIM CASE FILES FOR AGENCY DISABILITY PROGRAM. NEW CALL ORDER FOR ORIENTATION HOURS AND CASE REVIEWS. IGF::CL::IGF	\$14,400.00	\$14,400.00	2016	9/26/2016	1	SS05164C044	0	SMALL BUSINESS
FLATIRONS MEDICAL CONSULTANTS, LLC.	REGION 05 MEDICAL CONSULTANTS. REVIEWS BY MEDICAL CONSULTANT OF DISABILITY CLAIM CASE FILES FOR AGENCY DISABILITY PROGRAM. NEW CALL ORDER FOR ORIENTATION HOURS AND INDEPENDENT CASE REVIEWS. IGF::CL::IGF	\$14,400.00	\$14,400.00	2016	9/28/2016	1	SS05164C043	0	SMALL BUSINESS
GRASSI, MICHAEL G	REGION 05 MEDICAL CONSULTANTS. REVIEWS BY MEDICAL CONSULTANT OF DISABILITY CLAIM CASE FILES FOR AGENCY DISABILITY PROGRAM. NEW CALL ORDER FOR ORIENTATION HOURS AND INDEPENDENT CASE REVIEWS. IGF::CL::IGF	\$14,400.00	\$14,400.00	2016	9/28/2016	1	SS05164C038	0	SMALL BUSINESS
JONES, TORRA D	REGION 05 MEDICAL CONSULTANTS. REVIEWS BY MEDICAL CONSULTANT OF DISABILITY CLAIM CASE FILES FOR AGENCY DISABILITY PROGRAM. NEW CALL ORDER FOR ORIENTATION HOURS AND INDEPENDENT CASE REVIEWS. IGF::CL::IGF	\$14,400.00	\$14,400.00	2016	9/26/2016	1	SS05164C046	0	SMALL BUSINESS
SARGEANT, GALE M	REGION 05 MEDICAL CONSULTANTS. REVIEWS BY MEDICAL CONSULTANT OF DISABILITY CLAIM CASE FILES FOR AGENCY DISABILITY PROGRAM. NEW CALL ORDER FOR ORIENTATION HOURS AND INDEPENDENT CASE REVIEWS. IGF::CL::IGF	\$14,400.00	\$14,400.00	2016	9/15/2016	1	SS05164C045	0	SMALL BUSINESS
SAVAGE, HUGH R MD	REGION 05 MEDICAL CONSULTANTS. REVIEWS BY MEDICAL CONSULTANT OF DISABILITY CLAIM CASE FILES FOR AGENCY DISABILITY PROGRAM. NEW CALL ORDER FOR ORIENTATION HOURS AND INDEPENDENT CASE REVIEWS. IGF::CL::IGF	\$14,400.00	\$14,400.00	2016	9/15/2016	1	SS05164C041	0	SMALL BUSINESS
PIEDMONT CARDIOLOGY, P.A.	ME EXPRESS REPORTING - MENTAL HEALTH IGF::CT::IGF	\$14,390.00	\$14,390.00	2015	9/30/2015	2015	SS10541140178	0	SMALL BUSINESS

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Vendor Name	Description of Requirement	Action Obligation	Base and All Options Value	Fiscal Year	Date Signed	PO/Delivery Order/Task Order/Call#	Parent Contract	Mod #	Contracting Officers Business Size Selection
HEALTH AND SENIOR SERVICES, MISSOURI DEPARTMENT OF	IGF::OT::IGF OTHER FUNCTIONS MO RECEIPT OF ELECTRONIC DEATH RECORDS FOR OPTION YEAR III PERIOD OF PERFORMANCE JANUARY 1, 2015 - DECEMBER 31, 2015.	\$14,379.78	\$14,379.78	2015	12/29/2014	4	SS001260026	0	OTHER THAN SMALL BUSINESS
HARRIS M.D., MAURICE	IGF::CL::IGF MEDICAL CONSULTANT SERVICES - PHYSICAL CASES MODIFICATION TO ADD CASES	\$14,351.75	\$14,351.75	2015	6/23/2015	13	SS041140036	1	SMALL BUSINESS
ZUNIGA MD, LUIS M	DR. ZUNIGA MODIFICATION TO ADD CASES SS00-11-40021								
HOLLENDER, HEAVEN	IGF::OT::IGF	\$14,350.00	\$14,350.00	2015	5/11/2015	5	SS001140021	1	SMALL BUSINESS
DATTI, PAUL A	VE EXPRESS REPORTING IGF::CT::IGF	\$14,350.00	\$14,350.00	2015	9/30/2015	2015	SS10631250008	0	SMALL BUSINESS
NOLL, ALLEN	VE EXPRESS REPORTING IGF::CT::IGF	\$14,344.00	\$14,344.00	2015	9/30/2015	2015	SS10381130169	0	SMALL BUSINESS
NORTHROP GRUMMAN INFORMATION TECHNOLOGY INC	ME EXPRESS REPORTING - MENTAL HEALTH IGF::CT::IGF	\$14,333.60	\$14,333.60	2015	9/30/2015	2015	SS10631150275	0	SMALL BUSINESS
DLT SOLUTIONS, LLC	IGF::OT::IGF: SOFTWARE TO SUPPORT DEPLOYMENT TRA	\$14,311.55	\$14,311.55	2016	4/7/2016	SS001650082		0	OTHER THAN SMALL BUSINESS
	FLEXERA ADMINSTUDIO, FLEXWRAP AND FLEXNET MANA	\$14,276.86	\$14,276.86	2015	7/20/2015	SS001550212		0	OTHER THAN SMALL BUSINESS
LINA B CALDWELL, MD	MEDICAL CONTRACTING SERVICES - NON-CASE SERVICES (MENTORING) CLOSELY ASSOCIATED TO INHERENTLY GOVERNMENTAL FUNCTION IGF::CL::IGF	\$14,251.50	\$14,251.50	2015	2/9/2015	17	SS041140039	0	SMALL BUSINESS
LINA B CALDWELL, MD	MEDICAL CONTRACTING SERVICES - NON-CASE SERVICES (MENTORING) CLOSELY ASSOCIATED TO INHERENTLY GOVERNMENTAL FUNCTION IGF::CL::IGF	\$14,251.50	\$14,251.50	2015	6/1/2015	17	SS041140039	1	SMALL BUSINESS
LIBBIE J RUSSO DR	IGF::CL::IGF CLOSELY ASSOCIATED - REGIONAL MEDICA	\$14,245.00	\$14,245.00	2016	5/10/2016	1	SS07164C020	0	SMALL BUSINESS
COLB MD, A MARK	IGF::CL::IGF - SS01-15-4C002 - COLB, A MARK CALL ORDER 0003 FOR 180 INDEPENDENT CASE REVIEWS @ \$79.07 PER CASE FOR A TOTAL OF \$14,232.60.	\$14,232.60	\$14,232.60	2016	2/9/2016	3	SS01154C002	0	SMALL BUSINESS
HEALTH, WASHINGTON STATE DEPARTMENT OF	IGF::CL::IGF CLOSELY ASSOCIATED WA SS00-12-60023 ELECTRONIC DEATH REGISTRATION DELIVERY ORDER. 5080 EDR RECORDS TOTAL DELIVERY ORDER \$14,098.58. PERIOD OF PERFORMANCE 1/01/2016 - 1/31/2016.	\$14,098.58	\$14,098.58	2016	12/23/2015	5	SS001260023	0	OTHER THAN SMALL BUSINESS
PUBLIC HEALTH, MASSACHUSETTS DEPT OF	IGF::CL::IGF CLOSELY ASSOCIATED DELIVERY ORDER FOR RECEIPT OF ELECTRONIC DEATH RECORDS. 5079 EDR RECORDS, TOTAL \$14,095.41	\$14,095.41	\$14,095.41	2016	12/23/2015	5	SS001260053	0	OTHER THAN SMALL BUSINESS
HERMAN MILLER, INC.	TWIN FALLS, ID 1896 DESIGN AND INSTALLATION SERVICE	\$14,083.54	\$14,083.54	2016	6/6/2016	SS001630425	SS001260003	0	OTHER THAN SMALL BUSINESS
TIERSTEN, DAIVD, M.D.	IGF::CL::IGF REGION 2 MEDICAL CONSULTANTS. REVIEWS BY MEDICAL CONSULTANT OF DISABILITY CLAIM CASE FILES FOR AGENCY DISABILITY PROGRAM. MODIFICATION TO INCREASE QUANTITY AND EXTEND PERFORMANCE.	\$14,073.50	\$14,073.50	2015	9/24/2015	10	SS021040026	2	SMALL BUSINESS
RON FLECK VOCATIONAL CONSULTING	VE EXPRESS REPORTING IGF::CT::IGF	\$14,061.00	\$14,061.00	2015	9/30/2015	2015	SS10881190149	0	SMALL BUSINESS
ARCHIE S GOLDEN MD	OMA MEDICAL CONSULTANTS. REVIEWS BY MEDICAL CONSULTANT OF DISABILITY CLAIM CASE FILES FOR AGENCY DISABILITY PROGRAM. AWARD DR. GOLDEN INDEPENDENT CASE REVIEWS AND NON-CASE SERVICES. IGF::CL::IGF	\$14,050.00	\$14,050.00	2016	5/31/2016	1	SS00164C062	0	SMALL BUSINESS

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ROBERT FRANKLIN DRAPER, JR., M.D., P.A.	OMA MEDICAL CONSULTANTS. REVIEWS BY MEDICAL CONSULTANT OF DISABILITY CLAIM CASE FILES FOR AGENCY DISABILITY PROGRAM. AWARDING DR. DRAPER INDEPENDENT CASE REVIEWS AND NON-CASE SERVICES. IGF::CL::IGF	\$14,050.00	\$14,050.00	2016	6/7/2016	1	SS00164C060	0	SMALL BUSINESS
RAMIREZ, RICARDO J	IGF::CL::IGF CLOSELY ASSOCIATED SS01-11-40008 RAMIREZ, RICARDO - 180 INDEPENDENT DISABILITY CASE REVIEWS PERIOD OF PERFORMANCE 2/18/15 - 3/31/15 @ \$77.90 X 180 = \$14,022.00  IGF::CT::IGF CRITICAL FUNCTIONS IGF::OT::IGF OTHER FUNCTIONS IGF::CL,CT::IGF PRIMARILY CLOSELY, BUT ALSO CRITIAL IGF::CT,CL::IGF PRIMARILY CRITICAL, BUT ALSO CLOSELY	\$14,022.00	\$14,022.00	2015	2/18/2015	10	SS011140008	0	SMALL BUSINESS
MARTIN FECHNER MD	ME EXPRESS REPORTING - MENTAL HEALTH IGF::CT::IGF	\$14,020.00	\$14,020.00	2015	9/30/2015	2015	SS10251120014	0	SMALL BUSINESS
ADVANCING CAREERS	VE EXPRESS REPORTING IGF::CT::IGF	\$14,019.00	\$14,019.00	2015	9/30/2015	2015	SS10881190177	0	SMALL BUSINESS
POLLARD, JOHN	ME EXPRESS REPORTING - MENTAL HEALTH IGF::CT::IGF	\$14,010.00	\$14,010.00	2015	9/30/2015	2015	SS10631150292	0	SMALL BUSINESS
DPC CONSULTING LLC	MEDICAL CONSULTANT SERVICES - INITIAL ORIENTATION IGF::CL::IGF	\$14,000.00	\$14,000.00	2015	1/12/2015	1	SS041540002	0	SMALL BUSINESS
BENEDEK, ELISSA MD	ME EXPRESS REPORTING - MENTAL HEALTH IGF::CT::IGF	\$13,970.00	\$13,970.00	2015	9/30/2015	2015	SS10631150326	0	OTHER THAN SMALL BUSINESS
HAHOCH LIVNEH PHD	VE EXPRESS REPORTING IGF::CT::IGF	\$13,957.00	\$13,957.00	2015	9/30/2015	2015	SS11521100061	0	OTHER THAN SMALL BUSINESS
O'BRIEN, DEREK J MD	MEDICAL CONSULTANT SERVICES - MENTAL CASES CLOSELY ASSOCIATED TO INHERENTLY GOVERNMENTAL FUNCTION IGF::CL::IGF	\$13,941.70	\$13,941.70	2015	12/16/2014	15	SS041040088	0	SMALL BUSINESS
MICHAEL, MD, RUTH	IGF::CL::IGF CLOSELY ASSOCIATED - CALL ORDER FOR INITIAL REVIEW	\$13,920.00	\$13,920.00	2016	7/19/2016	2	SS08154C006	0	SMALL BUSINESS
DEPARTMENT OF HEALTH UTAH	ELECTRONIC DEATH REGISTRATION UTAH THE PURPOSE OF MODIFICATION NUMBER 5 IS TO EXERCISE OPTION YEAR IV TO EXTEND THE TERM OF THE CONTRACT FROM JANUARY 1, 2016 THROUGH DECEMBER 31, 2016 FOR RECEIPT OF ELECTRONIC DEATH RECORDS.	\$0.00	\$13,875.00	2016	12/9/2015	SS001260057		5	OTHER THAN SMALL BUSINESS
HEALTH SERVICES, WISCONSIN DEPARTMENT OF	IGF::CL::IGF CLOSELY ASSOCIATED DELIVERY ORDER FOR WI RECEIPT OF ELECTRONIC DEATH RECORDS. 5000 ELECTRONIC RECORDS, TOTAL \$13,875.00	\$13,875.00	\$13,875.00	2016	12/23/2015	5	SS001260059	0	OTHER THAN SMALL BUSINESS
PUBLIC HEALTH SOLUTIONS	IGF::CL::IGF CLOSELY ASSOCIATED NYC SS00-12-60033 ELECTRONIC DEATH REGISTRATION DELIVERY ORDER. 1620 EDR RECORDS TOTAL DELIVERY ORDER \$13,875.00. PERIOD OF PERFORMANCE 1/01/2016 - 1/31/2016.	\$13,875.00	\$13,875.00	2016	12/23/2015	5	SS001260033	0	OTHER THAN SMALL BUSINESS
DIVISION OF VITAL RECORDS	IGF::CL::IGF CLOSELY ASSOCIATED VA SS00-12-60044 ELECTRONIC DEATH REGISTRATION DELIVERY ORDER. 5,000 EDR RECORDS TOTAL DELIVERY ORDER \$13,875.00. PERIOD OF PERFORMANCE 1/01/2016 - 1/31/2016.	\$13,875.00	\$13,875.00	2016	12/23/2015	5	SS001260044	0	OTHER THAN SMALL BUSINESS
WYOMING, DEPARTMENT OF HEALTH	IGF::CL::IGF CLOSELY ASSOCIATED WY SS00-12-60010 ELECTRONIC DEATH REGISTRATION DELIVERY ORDER. 5,000 EDR RECORDS TOTAL DELIVERY ORDER \$13,875.00. PERIOD OF PERFORMANCE 1/01/2016 - 12/31/2016.	\$13,875.00	\$13,875.00	2016	12/22/2015	5	SS001260010	0	OTHER THAN SMALL BUSINESS
RICE, EDDIE	VE EXPRESS REPORTING IGF::CT::IGF	\$13,869.50	\$13,869.50	2015	9/30/2015	2015	SS10541140267	0	SMALL BUSINESS
DAVIS, JOHN W PHD	ME EXPRESS REPORTING - MENTAL HEALTH IGF::CT::IGF	\$13,850.00	\$13,850.00	2015	9/30/2015	2015	SS10541140124	0	SMALL BUSINESS
MUNDY, KATHLEEN	VE EXPRESS REPORTING IGF::CT::IGF	\$13,845.00	\$13,845.00	2015	9/30/2015	2015	SS10781160035	0	SMALL BUSINESS

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Vendor Name	Description of Requirement	Action Obligation	Base and All Options Value	Fiscal Year	Date Signed	PO/Delivery Order/Task Order/Call#	Parent Contract	Mod #	Contracting Officers Business Size Selection
JAMES H MILLER	VE EXPRESS REPORTING IGF::CT::IGF	\$13,822.60	\$13,822.60	2015	9/30/2015	2015	SS10541140269	0	SMALL BUSINESS
HERMAN MILLER, INC.	SAN JUAN, PR #AE04 SYSTEMS FURNITURE DESIGN, INST	\$13,813.85	\$13,813.85	2015	12/15/2014	SS001432040	SS001260003	1	OTHER THAN SMALL BUSINESS
HICKMAN, JOHN W PHD	ME EXPRESS REPORTING - MENTAL HEALTH IGF::CT::IGF	\$13,810.00	\$13,810.00	2015	9/30/2015		SS10781160144	0	SMALL BUSINESS
DONALD M BLACKMAN MD FACP	ME EXPRESS REPORTING - MENTAL HEALTH IGF::CT::IGF	\$13,750.00	\$13,750.00	2015	9/30/2015		SS10881190030	0	SMALL BUSINESS
HEALTH, WASHINGTON STATE DEPARTMENT OF	IGF::OT::IGF OTHER FUNCTIONS WA RECEIPT OF ELECTRONIC DEATH RECORDS FOR OPTION YEAR III PERIOD OF PERFORMANCE JANUARY 1, 2015 - JANUARY 31, 2015.	\$13,749.13	\$13,749.13	2015	12/30/2014	4	SS001260023	0	OTHER THAN SMALL BUSINESS
GROWICK, BRUCE	ME EXPRESS REPORTING - MENTAL HEALTH IGF::CT::IGF	\$13,743.00	\$13,743.00	2015	9/30/2015		SS10631150099	0	SMALL BUSINESS
MACKLIN MD, MARTIN	ME EXPRESS REPORTING - MENTAL HEALTH IGF::CT::IGF	\$13,730.00	\$13,730.00	2015	9/30/2015		SS10631150160	0	SMALL BUSINESS
HERMAN MILLER, INC.	G218- PHILADELPHIA,(GERMANTOWN),PA DESIGN, INSTA	\$13,727.35	\$13,727.35	2015	7/16/2015	SS001530736	SS001260003	0	OTHER THAN SMALL BUSINESS
ROBERT G TAUB	ME EXPRESS REPORTING - MENTAL HEALTH IGF::CT::IGF	\$13,720.00	\$13,720.00	2015	9/30/2015		SS10631150008	0	SMALL BUSINESS
ADMIRAL ELEVATOR COMPANY, INC.	IGF::OT::IGF  TASK ORDER #48 SS00-15-30656  REPLACE WORN AND DAMAGED CARPET IN EAST HIGH RISE 5TH FLOOR FROM 5-A-3 TO 5-A-8	\$13,712.63	\$13,712.63	2015	6/29/2015	SS001530656	SS001060042	0	SMALL BUSINESS
LABOR AND INDUSTRY, MONTANA DEPARTMENT OF	IGF::OT::IGF REGION 8 SMALL CONTRACTS- ONLINE ACCESS TO MONTANA STATE RECORDS TO SOCIAL SECURITY ADMINISTRATION REGION 8 OFFICES.	\$13,700.00	\$13,700.00	2015	8/17/2015	SS081550002		0	OTHER THAN SMALL BUSINESS
MARTIN, HILDA KLEIN	IGF::CL::IGF REGION 5 MEDICAL CONSULTANTS. REVIEWS BY MEDICAL CONSULTANT OF DISABILITY CLAIM CASE FILES FOR AGENCY DISABILITY PROGRAM. MODIFICATION TO ADD CASE REVIEWS.	\$13,686.00	\$13,686.00	2016	5/11/2016	1	SS05164C013	1	SMALL BUSINESS
MICHAEL COLANDREA	MEDICAL CONSULTANT SERVICES AWARDING MICHAEL COLANDREA INDEPENDENT CASE REVIEWS AGAINST BPA SS05-16-4C031, CALL ORDER 0001. IGF::CT::IGF	\$13,686.00	\$13,686.00	2016	5/3/2016	1	SS05164C031	0	SMALL BUSINESS
HOY-WATKINS, MICHELLE	MEDICAL CONSULTANT SERVICES DR. MICHELLE HOY-WATKINS IGF::CL::IGF	\$13,686.00	\$13,686.00	2016	3/15/2016	1	SS05164C014	0	SMALL BUSINESS
SAI R NIMMAGADDA	MEDICAL CONSULTANT SERVICES DR. SAI NIMMAGADDA IGF::CL::IGF	\$13,686.00	\$13,686.00	2016	3/14/2016	1	SS05164C020	0	SMALL BUSINESS
BUSH, PATRICIA R MD	THE CONTRACTOR SHALL COMPLETE INDEPENDENT CASE REVIEWS IN ACCORDANCE WITH THE TERMS AND CONDITIONS SET FORTH IN THE RMC BPA. PERIOD OF PERFORMANCE - 04/01/2016 TO 06/30/2016. IGF::CT::IGF	\$13,686.00	\$13,686.00	2016	3/21/2016	1	SS05164C005	0	SMALL BUSINESS
COMPONENTSOURCE, INC.	THE OFFICE OF TELECOMMUNICATIONS AND SYSTEMS O	\$13,679.80	\$13,679.80	2015	4/16/2015	SS001550115		0	SMALL BUSINESS
BILLINGHURST, CRAIG MD	BILLINGHURST - CALL ORDER - CASES  IGF::CL::IGF	\$13,617.00	\$13,617.00	2015	7/14/2015	13	SS061140003	1	SMALL BUSINESS
RYAN MD, COLLEEN M	IGF::CL::IGF RYAN - CALL ORDER - REVIEWS	\$13,617.00	\$13,617.00	2015	4/10/2015	12	SS061140030	0	SMALL BUSINESS
ALVIN SMITH PHD	IGF::CL::IGF SMITH - CALL ORDER - CASES	\$13,617.00	\$13,617.00	2015	7/17/2015	14	SS061140024	1	SMALL BUSINESS
RAMIREZ, RICARDO J	IGF::CL::IGF SS01-16-4C025 RAMIREZ, RICARDO. INDEPENDENT DISABILITY CASE REVIEWS AND NON-CASE HOURS. MODIFICATION TO INCREASE NON-CASE HOURS.	\$13,585.50	\$13,585.50	2016	4/25/2016	1	SS01164C025	1	SMALL BUSINESS
DEPARTMENT OF HEALTH UTAH	ELECTRONIC DEATH REGISTRATION - UTAH	\$0.00	\$13,525.00	2015	12/18/2014	SS001260057		4	OTHER THAN SMALL BUSINESS

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Vendor Name	Description of Requirement	Action Obligation	Base and All Options Value	Fiscal Year	Date Signed	PO/Delivery Order/Task Order/Call#	Parent Contract	Mod #	Contracting Officers Business Size Selection
PUBLIC HEALTH SOLUTIONS	IGF::OT::IGF OTHER FUNCTIONS NYC RECEIPT OF ELECTRONIC DEATH RECORDS FOR OPTION YEAR III PERIOD OF PERFORMANCE JANUARY 1, 2015 - DECEMBER 31, 2015.	\$13,525.00	\$13,525.00	2015	12/29/2014	4	SS001260033	0	OTHER THAN SMALL BUSINESS
DIVISION OF VITAL RECORDS	IGF::OT::IGF OTHER FUNCTIONS VA RECEIPT OF ELECTRONIC DEATH RECORDS FOR OPTION YEAR III PERIOD OF PERFORMANCE JANUARY 1, 2015 - DECEMBER 31, 2015	\$13,525.00	\$13,525.00	2015	12/29/2014	4	SS001260044	0	OTHER THAN SMALL BUSINESS
HEALTH SERVICES, WISCONSIN DEPARTMENT OF	IGF::OT::IGF OTHER FUNCTIONS WI RECEIPT OF ELECTRONIC DEATH RECORDS FOR OPTION YEAR III PERIOD OF PERFORMANCE JANUARY 1, 2015 - JANUARY 31, 2015.	\$13,525.00	\$13,525.00	2015	12/30/2014	4	SS001260059	0	OTHER THAN SMALL BUSINESS
MELODY HENRY	VE EXPRESS REPORTING IGF::CT::IGF	\$13,518.00	\$13,518.00	2015	9/30/2015	2015	SS10631150025	0	SMALL BUSINESS
CQ-ROLL CALL, INC.	2017 SUBSCRIPTION RENEWAL FOR FEDERAL NEWS SERV	\$13,500.00	\$13,500.00	2017	10/1/2016	SS001750006		0	OTHER THAN SMALL BUSINESS
CQ-ROLL CALL, INC.	PURCHASE ORDER FOR SUBSCRIPTION RENEWAL FOR FEDERAL NEWS SERVICE. PERIOD OF PERFORMANCE 10/01/2015 - 9/30/2016.	\$13,500.00	\$13,500.00	2016	10/1/2015	SS001650006		0	OTHER THAN SMALL BUSINESS
MULLER, ROBERT L PH D	ME EXPRESS REPORTING - MENTAL HEALTH IGF::CT::IGF	\$13,480.00	\$13,480.00	2015	9/30/2015	2015	SS10381130060	0	SMALL BUSINESS
THOMPSON, WILLIAM EARL JR	VE EXPRESS REPORTING IGF::CT::IGF	\$13,378.00	\$13,378.00	2015	9/30/2015	2015	SS10541140653	0	SMALL BUSINESS
I/S MANAGEMENT STRATEGIES LTD	RENEWAL OF SS00-15-50037 MAINTENANCE OF I/S MAN	\$0.00	\$13,334.00	2016	12/17/2015	SS001650022		1	OTHER THAN SMALL BUSINESS
RENNER, LISA	IGF::CL::IGF CLOSELY ASSOCIATED NEW CALL ORDER FC	\$13,300.00	\$13,300.00	2016	12/22/2015	1	SS08164C019	0	SMALL BUSINESS
BRENNER, ANNE MANON MD	IGF::CL::IGF CLOSELY ASSOCIATED NEW CALL ORDER FO	\$13,300.00	\$13,300.00	2016	12/21/2015	2	SS08164C002	0	SMALL BUSINESS
FLATIRONS MEDICAL CONSULTANTS, LLC.	IGF::CL::IGF FLATIRONS MEDICAL FORMAL PRESENTATIONS ORIENTATION CASE REVIEWS	\$13,260.00	\$13,260.00	2016	9/1/2016	1	SS02164C024	0	SMALL BUSINESS
SEBA PROFESSIONAL SERVICES LLC	IGF::CL::IGF SEBA PROFESSIONAL SERVICES DR SCHNEIDER FORMAL PRESENTATIONS	\$13,260.00	\$13,260.00	2016	9/1/2016	2	SS02164C025	0	SMALL BUSINESS
SEBA PROFESSIONAL SERVICES LLC	IGF::CL::IGF SEBA PROFESSIONAL SERVICES DR LANDMARK FORMAL PRESENTATIONS ORIENTATION CASE REVIEWS	\$13,260.00	\$13,260.00	2016	9/1/2016	1	SS02164C025	0	SMALL BUSINESS
SEBA PROFESSIONAL SERVICES LLC	IGF::CL::IGF SEBA PROFESSIONAL SERVICES SS02-16-4C025 FORMAL PRESENTATIONS AND ORIENTATION CASE REVIEWS	\$13,260.00	\$13,260.00	2016	9/1/2016	3	SS02164C025	0	SMALL BUSINESS
SIMONE, KAREN A	VE EXPRESS REPORTING IGF::CT::IGF	\$13,260.00	\$13,260.00	2015	9/30/2015	2015	SS10251320023	0	SMALL BUSINESS
BENJAMIN CORTIJO JR MD	IGF::CL::IGF REGION 2 MEDICAL CONSULTANTS. REVIEWS BY MEDICAL CONSULTANT OF DISABILITY CLAIM CASE FILES FOR AGENCY DISABILITY PROGRAM.	\$13,254.40	\$13,254.40	2016	9/29/2016	1	SS02164C008	2	SMALL BUSINESS
WALLACE & ASSOCIATES INC	VE EXPRESS REPORTING IGF::CT::IGF	\$13,253.00	\$13,253.00	2015	9/30/2015	2015	SS10881190247	0	SMALL BUSINESS
CEIA USA, LTD	WALK-THROUGH METAL DETECTOR	\$13,251.15	\$13,251.15	2015	4/15/2015	SS041550022		0	SMALL BUSINESS
FIRE & LIFE SAFETY AMERICA, INC.	IGF::OT::IGF THE PURPOSE OF THIS PURCHASE ORDER IS	\$13,225.56	\$13,225.56	2016	5/19/2016	SS001650137		0	OTHER THAN SMALL BUSINESS
HERMAN MILLER, INC.	STERLING HEIGHTS, MI XD14 OFFICE IS ADDING A WORK	\$13,186.54	\$13,186.54	2016	4/20/2016	SS001630316	SS001260003	0	OTHER THAN SMALL BUSINESS
HENSEL PHELPS SERVICES LLC	IGF::CL::IGF SUPPLY AND INSTALL A VAV BOX, BATTERY CHARGERS AND ELECTRICAL CONDUITS PER ATTACHED SCOPE OF WORK	\$13,177.00	\$13,177.00	2015	8/27/2015	SS001530891	SS001461106	0	OTHER THAN SMALL BUSINESS
SHWETZ, MARY H MD	IGF::CL::IGF REGION 10, MARY SHWETZ, MC ADDITION OF INDEPENDENT CASE REVIEWS	\$13,166.40	\$13,166.40	2015	4/13/2015	1	SS10154C008	0	SMALL BUSINESS
WINSLOW MD, RICHARD S	IGF::CL::IGF WINSLOW, MC, REGION 10 ADD CASES AND FUNDING	\$13,104.00	\$13,104.00	2016	6/1/2016	2	SS10154C011	1	SMALL BUSINESS
HOWARD CASTON & ASSOCIATES INC	VE EXPRESS REPORTING IGF::CT::IGF	\$13,102.00	\$13,102.00	2015	9/30/2015	2015	SS10631150419	0	SMALL BUSINESS
STACY KOUTRAKOS, PSY.D.	IGF::CL::IGF CLOSELY ASSOCIATED NEW CALL ORDER ORIENTATION CASE REVIEWS FOR REGION 8 SPECIALTY - PSYCHOLOGIST	\$13,100.00	\$13,100.00	2016	3/3/2016	2	SS08164C012	0	SMALL BUSINESS



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Vendor Name	Description of Requirement	Action Obligation	Base and All Options Value	Fiscal Year	Date Signed	PO/Delivery Order/Task Order/Call#	Parent Contract	Mod #	Contracting Officers Business Size Selection
HERMAN MILLER, INC.	MILWAUKEE S, WI #XE26- ADD ON - SYSTEMS FURNITUR	\$13,068.54	\$13,068.54	2016	9/12/2016	SS001630768	SS001260003	0	OTHER THAN SMALL BUSINESS
	IGF::OT::IGF								
	TASK ORDER #43 SS00-15-30655								
ADMIRAL ELEVATOR COMPANY, INC.	REMOVE AND REPLACE THE CARPET TILE IN THE EAST HIGH RISE GROUND FLOOR CONFERENCE CENTER.	\$13,034.94	\$13,034.94	2015	6/24/2015	SS001530655	SS001060042	0	SMALL BUSINESS
HERMAN MILLER, INC.	JUNEAU, AK C996 - DESIGN, PRODUCT ESTIMATE AND IN	\$13,014.64	\$13,014.64	2015	12/12/2014	SS001530156	SS001260003	0	OTHER THAN SMALL BUSINESS
SPENCE, WILLIAM	ME EXPRESS REPORTING - MENTAL HEALTH IGF::CT::IGF	\$12,960.00	\$12,960.00	2015	9/30/2015		2015 SS11521100012	0	SMALL BUSINESS
RETINAL AND MACULAR CONSULTANTS, P.A. LAWRENCE T. REESE, M.D. C/O LAWRENCE	ME EXPRESS REPORTING - MENTAL HEALTH IGF::CT::IGF	\$12,950.00	\$12,950.00	2015	9/30/2015		2015 SS10541140028	0	SMALL BUSINESS
TODD, JAMES W MD	ME EXPRESS REPORTING - MENTAL HEALTH IGF::CT::IGF	\$12,940.00	\$12,940.00	2015	9/30/2015		2015 SS11501110048	0	SMALL BUSINESS
HERMAN MILLER, INC.	FORT SMITH AR Y756 DESIGN, INSTALLATION, AND PROD	\$12,914.35	\$12,914.35	2015	4/17/2015	SS001530420	SS001260003	0	OTHER THAN SMALL BUSINESS
	IGF::CL::IGF								
CALKINS, SUSAN D	OMA MEDICAL CONSULTANTS. REVIEWS BY MEDICAL CONSULTANT OF DISABILITY CLAIM CASE FILES FOR AGENCY DISABILITY PROGRAM. MODIFICATION TO ADD CASE REVIEWS.	\$12,900.00	\$12,900.00	2016	9/28/2016		1 SS00164C006	1	SMALL BUSINESS
	IGF::CL::IGF								
GOLDBERG, GAIL	OMA MEDICAL CONSULTANTS. REVIEWS BY MEDICAL CONSULTANT OF DISABILITY CLAIM CASE FILES FOR AGENCY DISABILITY PROGRAM. MODIFICATION TO ADD CASE REVIEWS.	\$12,900.00	\$12,900.00	2016	9/28/2016		1 SS00164C017	1	SMALL BUSINESS
	OMA MEDICAL CONSULTANTS. REVIEWS BY MEDICAL CONSULTANT OF DISABILITY CLAIM CASE FILES FOR AGENCY DISABILITY PROGRAM. ADDING INDEPENDENT CASE REVIEWS.								
GREENBERG , MICHAEL K MD	IGF::CL::IGF	\$12,900.00	\$12,900.00	2017	11/29/2016		1 SS00164C020	2	SMALL BUSINESS
MILLER GARRISON PHD	VE EXPRESS REPORTING IGF::CT::IGF	\$12,900.00	\$12,900.00	2015	9/30/2015		2015 SS11521100066	0	SMALL BUSINESS
	IGF::CL::IGF								
THE AXON GROUP	REGION 2 MEDICAL CONSULTANTS. REVIEWS BY MEDICAL CONSULTANT OF DISABILITY CLAIM CASE FILES FOR AGENCY DISABILITY PROGRAM.	\$12,874.00	\$12,874.00	2016	2/11/2016		6 SS021240003	0	SMALL BUSINESS
MCKEOWN, DOUG	VE EXPRESS REPORTING IGF::CT::IGF	\$12,863.80	\$12,863.80	2015	9/30/2015		2015 SS10541140034	0	SMALL BUSINESS
	IGF::CL::IGF								
HEMANTHA SURATH MD	MEDICAL CONSULTANT SERVICES- REGION 5 AWARDDING DR. HEMANTHA SURATH INDEPENDENT CASE REVIEWS AGAINST SS05-16-4C026, CALL ORDER 1.	\$12,773.60	\$12,773.60	2016	3/24/2016		1 SS05164C026	0	SMALL BUSINESS
	HAZARDOUS WASTE AND SURPLUS CHEMICALS WERE GENERATED DURING ROUTINE BUILDING OPERATIONS AND MAINTENANCE. SSA CAN STORE THESE MATERIALS FOR 90 DAYS AND THEN THEY MUST BE PROPERLY DISPOSED OF ACCORDING TO LOCAL , STATE, AND FEDERAL REGULATIONS OR THE AGENCY WILL BE NON COMPLIANT WITH SEVERAL STATE AND FEDERAL REGULATIONS.								
B.S. ENVIRONMENTAL, INC.	FPDS FUNCTION: IGF::OT::IGF	\$12,755.00	\$12,755.00	2015	3/13/2015	SS001530320	SS001461041	0	SMALL BUSINESS
	IGF::OT::IGF								
	TO PROCURE SERVICES TO CONDUCT AN ARBITRATION HEARING AND RECEIVE A DECISION ISSUANCE CONCERNING LABOR GRIEVANCE FILED BY THE ASSOCIATION OF ADMINISTRATIVE LAW JUDGES. ALL IN COMPLIANCE WITH THE COLLECTIVE BARGAINING AGREEMENT.	\$12,751.86	\$12,751.86	2016	6/7/2016	SS001650184		0	SMALL BUSINESS
ROSS, JEROME H LTD	ME EXPRESS REPORTING - MENTAL HEALTH IGF::CT::IGF	\$12,740.00	\$12,740.00	2015	9/30/2015		2015 SS10541140184	0	SMALL BUSINESS
BRYAN, EDWIN L	VE EXPRESS REPORTING IGF::CT::IGF	\$12,723.00	\$12,723.00	2015	9/30/2015		2015 SS11501210004	0	SMALL BUSINESS
PALMER VOCATIONAL CONSULTING									

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Vendor Name	Description of Requirement	Action Obligation	Base and All Options Value	Fiscal Year	Date Signed	PO/Delivery Order/Task Order/Call#	Parent Contract	Mod #	Contracting Officers Business Size Selection
COMCAST OF BOSTON, INC.	IGF::OT::IGF OTHER FUNCTIONS COMCAST SERVICE BOSTON REGIONAL OFFICE, FLOOR 19, 21 AND 6.	\$6,400.00	\$12,679.40	2016	10/19/2015	SS011660001		0	OTHER THAN SMALL BUSINESS
INNOVATION DATA PROCESSING, INC.	ADDITION MSU'S INNOVATION DATA PROCESSING SOFT	\$12,654.00	\$12,654.00	2015	12/18/2014	SS001550008		1	OTHER THAN SMALL BUSINESS
FRANKLIN CORBIN CONSULTING	VE EXPRESS REPORTING IGF::CT::IGF	\$12,651.00	\$12,651.00	2015	9/30/2015	2015	SS11521100053	0	SMALL BUSINESS
BERNARD FARRELL DR	OMA MEDICAL CONSULTANTS. REVIEWS BY MEDICAL CONSULTANT OF DISABILITY CLAIM CASE FILES FOR AGENCY DISABILITY PROGRAM. AWARDING DR. FARRELL INDEPENDENT CASE REVIEWS AND NON-CASE SERVICES. IGF::CL::IGF	\$12,625.00	\$12,625.00	2016	5/31/2016	1	SS00164C014	0	SMALL BUSINESS
IMMIXTECHNOLOGY, INC.	RENEWAL OF SS00-14-51278 FOR VOVICI SOFTWARE	\$12,621.03	\$12,621.03	2015	7/22/2015	SS001550214		0	OTHER THAN SMALL BUSINESS
KUMAR, ASHIR	ME EXPRESS REPORTING - MENTAL HEALTH IGF::CT::IGF	\$12,569.54	\$12,569.54	2015	9/30/2015	2015	SS10631150224	0	SMALL BUSINESS
FEDERAL PRISON INDUSTRIES INC	UNICOR FURNITURE FOR THE PHILADELPHIA REGION 9	\$12,523.29	\$12,523.29	2015	9/21/2015	SS001550303		0	OTHER THAN SMALL BUSINESS
TECHXTEND, INC.	RENEWAL OF SS00-15-50084 FOR MAINTENANCE OF INT	\$12,509.55	\$12,509.55	2016	4/6/2016	SS001650097		0	OTHER THAN SMALL BUSINESS
CONQUEST SYSTEMS, INC.	DATA-PLANET STATISTICAL DATASETS ANNUAL SUBSCRIP	\$12,500.00	\$12,500.00	2016	2/9/2016	SS001650066		0	SMALL BUSINESS
CONQUEST SYSTEMS, INC.	FY15 SUBSCRIPTION RENEWAL OF STATISTICAL DATASET	\$12,500.00	\$12,500.00	2015	3/16/2015	SS001550088		0	SMALL BUSINESS
NIELSEN COMPANY US LLC, THE	THE SSA OFFICE OF QUALITY IMPROVEMENT REQUIRES T	\$12,500.00	\$12,500.00	2015	2/4/2015	SS001550073		0	OTHER THAN SMALL BUSINESS
NIELSEN COMPANY (US), LLC, THE	THE SSA OFFICE OF QUALITY IMPROVEMENT REQUIRES T	\$12,500.00	\$12,500.00	2016	3/7/2016	SS001650079		0	OTHER THAN SMALL BUSINESS
RICHMOND SANITARY SERVICE, INC.	20 YD DUMPSTER GREEN FOR EXCESSING DISPOSAL - SEPTEMBER 25, 2016 TO SEPTEMBER 24, 2017 IGF::CT::IGF	\$12,417.99	\$12,417.99	2016	9/1/2016	SS091651015		0	OTHER THAN SMALL BUSINESS
SMARTER SECURITY, INC.	ENTRANCE THROUGH THE MAIN LOBBY OF THE RTP OFF	\$12,413.00	\$12,413.00	2015	5/11/2015	SS001550137		0	SMALL BUSINESS
TECHNICAL INNOVATION, LLC	SOUND EMITTERS NEEDED TO CONTROL SOUND LEVELS WITHIN OFFICE AREAS. IGF::OT::IGF	\$12,410.61	\$12,410.61	2016	5/10/2016	SS041650007		0	OTHER THAN SMALL BUSINESS
SALVATORE, GAROZZO	VE EXPRESS REPORTING IGF::CT::IGF	\$12,394.00	\$12,394.00	2015	9/30/2015	2015	SS10251120053	0	SMALL BUSINESS
DALLAS LIGHTHOUSE FOR THE BLIND, INC.	CHANGE CONTRACTING OFFICER REPRESENTATIVE	\$12,352.00	\$12,352.00	2015	5/1/2015	SS061060013		14	SMALL BUSINESS
PESANDO, JOHN	IGF::CL::IGF JOHN PESANDO, MC, REG. 10 ADDITION AND FUNDING OF INDEPENDENT CASE REVIEWS	\$12,343.50	\$12,343.50	2015	5/20/2015	11	SS101140018	0	SMALL BUSINESS
HERMAN MILLER, INC.	GREENVILLE, SC CX48 - DESIGN, PRODUCT AND INSTALLA	\$12,324.00	\$12,324.00	2015	2/23/2015	SS001530287	SS001260003	0	OTHER THAN SMALL BUSINESS
BROWN, SANNAGAI	MEDICAL CONSULTANT SERVICES - PHYSICAL CASES CLOSELY ASSOCIATED TO INHERENTLY GOVERNMENTAL FUNCTION IGF::CL::IGF	\$12,301.50	\$12,301.50	2015	4/28/2015	12	SS041140041	2	SMALL BUSINESS
HUMPHREYS, JOHN L.	MEDICAL CONSULTANT SERVICES - PHYSICAL CASES CLOSELY ASSOCIATED TO INHERENTLY GOVERNMENTAL FUNCTION IGF::CL::IGF	\$12,301.50	\$12,301.50	2015	3/16/2015	15	SS041140048	1	SMALL BUSINESS
RICHARD T THIO MD	MEDICAL CONSULTANT SERVICES - PHYSICAL CASES CLOSELY ASSOCIATED TO INHERENTLY GOVERNMENTAL FUNCTION IGF::CL::IGF FOR CLOSELY ASSOCIATED	\$12,301.50	\$12,301.50	2015	2/5/2015	16	SS041140058	0	SMALL BUSINESS
KNOTT MD, HURLEY W	MEDICAL CONTRACTOR SERVICES - PHYSICAL CASES CLOSELY ASSOCIATED TO INHERENTLY GOVERNMENTAL FUNCTION IGF::CL::IGF FOR CLOSELY ASSOCIATED	\$12,301.50	\$12,301.50	2016	11/17/2015	13	SS041140028	0	SMALL BUSINESS
JOHN W. GOULDMAN, M.D., L.L.C.	MEDICAL CONTRACTOR SERVICES - PHYSICAL CASES IGF::CL::IGF	\$12,301.50	\$12,301.50	2015	1/12/2015	12	SS041040082	0	SMALL BUSINESS
JACINTO DEBORJA MD	MEDICAL CONSULTANT CONTRACTORS BLANKET PURCHASE AGREEMENT IGF::CL::IGF	\$12,300.00	\$12,300.00	2015	1/28/2015	5	SS001140120	0	SMALL BUSINESS

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Vendor Name	Description of Requirement	Action Obligation	Base and All Options Value	Fiscal Year	Date Signed	PO/Delivery Order/Task Order/Call#	Parent Contract	Mod #	Contracting Officers Business Size Selection
PETERSON, SONIA LYNNE	VE EXPRESS REPORTING IGF::CT::IGF	\$12,282.00	\$12,282.00	2015	9/30/2015	2015	SS10881190281	0	SMALL BUSINESS
FRIEDMAN, GARY	IGF::CL::IGF REGION 2 MEDICAL CONSULTANTS. REVIEWS BY MEDICAL CONSULTANT OF DISABILITY CLAIM CASE FILES FOR AGENCY DISABILITY PROGRAM.	\$12,243.00	\$12,243.00	2015	2/20/2015	7	SS021140080	0	SMALL BUSINESS
SEYMOUR R BORTNER MD	IGF::CL::IGF REGION 2 MEDICAL CONSULTANTS. REVIEWS BY MEDICAL CONSULTANT OF DISABILITY CLAIM CASE FILES FOR AGENCY DISABILITY PROGRAM. MODIFICATION TO INCREASE QUANTITY AND EXTEND PERFORMANCE.	\$12,243.00	\$12,243.00	2015	6/15/2015	8	SS021140011	1	SMALL BUSINESS
ZWI KAHANOWICZ MD	IGF::CL::IGF REGION 2 MEDICAL CONSULTANTS. REVIEWS BY MEDICAL CONSULTANT OF DISABILITY CLAIM CASE FILES FOR AGENCY DISABILITY PROGRAM. MODIFICATION TO INCREASE QUANTITY AND EXTEND PERFORMANCE.	\$12,243.00	\$12,243.00	2015	6/18/2015	6	SS021140088	1	SMALL BUSINESS
SHI INTERNATIONAL CORP.	RENEWAL OF SS00-14-51107 FOR MAINTENANCE OF PRO	\$12,154.95	\$12,154.95	2015	3/2/2015	SS001550084		0	OTHER THAN SMALL BUSINESS
THE AXON GROUP	IGF::CL::IGF REGION 2 MEDICAL CONSULTANTS. REVIEWS BY MEDICAL CONSULTANT OF DISABILITY CLAIM CASE FILES FOR AGENCY DISABILITY PROGRAM. MODIFICATION TO INCREASE QUANTITY AND EXTEND PERFORMANCE.	\$12,118.50	\$12,118.50	2015	6/22/2015	5	SS021240003	1	SMALL BUSINESS
NATIONAL ASSOCIATION FOR PUBLIC HEALTH STATISTICS AND INFORM	IGF::OT::IGF TECHNICAL ASSISTANCE AND TESTING OF STATE ELECTRONIC DEATH REGISTRATION SYSTEMS (EDRS). TASK 2 FOR THE STATE OF NORTH CAROLINA TASK 3 FOR THE STATE OF NEW MEXICO	\$12,088.00	\$12,088.00	2016	4/12/2016	SS001630297	SS001660002	0	OTHER THAN SMALL BUSINESS
BRUCE G. WITKIND, M.D. CONSULTING	ME EXPRESS REPORTING - MENTAL HEALTH IGF::CT::IGF	\$12,070.00	\$12,070.00	2015	9/30/2015	2015	SS10541140110	0	SMALL BUSINESS
HERMAN MILLER, INC.	SYSTEMS FURNITURE CONTRACT - TO PAY CLAIMS UNDE	\$12,036.66	\$12,036.66	2016	4/20/2016	SS001260003		35	OTHER THAN SMALL BUSINESS
DRAKE, STEPHEN D. PH.D.	IGF::CL::IGF REGIONAL MEDICAL CONSULTANT SERVICES - REVIEWS BY MEDICAL CONSULTANT OF DISABILITY CLAIM CASE FILES FOR AGENCY DISABILITY PROGRAM.	\$12,000.00	\$12,000.00	2016	4/4/2016	1	SS06164C032	0	SMALL BUSINESS
HEALTH AND HUMAN SERVICES, MAINE DEPARTMENT OF	IGF::OT::IGF OTHER FUNCTIONS  THIS MODIFICATION ADDS FUNDING FOR 3,883 MORE ELECTRONIC DEATH RECORDS RECEIVED THAN ORIGINALLY ESTIMATED.  ELECTRONIC DEATH RECORDS - MAINE	\$11,998.47	\$11,998.47	2016	11/25/2015	4	SS001260043	1	OTHER THAN SMALL BUSINESS
UNITED STATES POSTAL SERVICE	THE PURPOSE OF THIS AWARD IS TO RENEW WILKES BARRE PA POST OFFICES USED TO SORT INBOUND MAIL BY COMPONENT. POST OFFICE BOXES ARE TO RENEWED BY PERIOD OF PERFORMANCE- 5/1/2016- 4/30/2017.	\$11,988.00	\$11,988.00	2016	3/23/2016	SS031650002		0	OTHER THAN SMALL BUSINESS
SPECIAL SERVICES GROUP, LLC	IGF::CL::IGF COVERT DVR RECORDING SYSTEM FOR THE DALLAS CDI U	\$11,961.43	\$11,961.43	2015	9/8/2015	SS061550006		0	SMALL BUSINESS
WEAVER, L JEAN MD	MEDICAL CONSULTANT SERVICES IGF::CL::IGF CLOSELY ASSOCIATED	\$11,906.40	\$11,906.40	2016	11/24/2015	10	SS101140019	1	SMALL BUSINESS
ROSENSHIELD, PHILIP	IGF::CL::IGF CLOSELY ASSOCIATED - REGIONAL MEDICA	\$11,889.00	\$11,889.00	2016	1/13/2016	11	SS071140027	0	SMALL BUSINESS
ALPAR, JOHN J MD PA	VE EXPRESS REPORTING IGF::CT::IGF	\$11,870.00	\$11,870.00	2015	9/30/2015	2015	SS10781160010	0	SMALL BUSINESS
COLB MD, A MARK	RMC - ORIENTATION IGF::CL::IGF	\$11,866.00	\$11,866.00	2015	3/31/2015	1	SS01154C002	0	SMALL BUSINESS
HOLMES, MICHELLE D	RMC - ORIENTATION IGF::CL::IGF	\$11,866.00	\$11,866.00	2015	3/31/2015	1	SS01154C000	0	SMALL BUSINESS

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NAOMI M KELLY	IGF::CL::IGF CLOSELY ASSOCIATED - RMC - CASE REVIEW	\$11,860.50	\$11,860.50	2015	7/2/2015		9 SS011140028	1	SMALL BUSINESS
WEIN, ANNE	VE EXPRESS REPORTING IGF::CT::IGF	\$11,850.00	\$11,850.00	2015	9/30/2015		2015 SS11511580001	0	SMALL BUSINESS
METALOGIX SOFTWARE US INC.	RENEW MAINTENANCE ON AXCELER CONTROL POINT SO	\$11,829.83	\$11,829.83	2015	6/3/2015	SS001550149		0	OTHER THAN SMALL BUSINESS
PI, DIANA J	ME EXPRESS REPORTING - MENTAL HEALTH IGF::CT::IGF	\$11,800.00	\$11,800.00	2015	9/30/2015		2015 SS10631550004	0	SMALL BUSINESS
WELDON, WILLIAMS & LICK, INC.	SSA PARKING PERMIT HANG-TAGS THAT WILL BE ISSUED	\$11,800.00	\$11,800.00	2015	6/15/2015	SS001550173		0	SMALL BUSINESS
EAR NOSE & THROAT ASSOCIATES PC	ME EXPRESS REPORTING - MENTAL HEALTH IGF::CT::IGF	\$11,790.00	\$11,790.00	2015	9/30/2015		2015 SS10691170024	0	SMALL BUSINESS
GRANT, JUANITA	VE EXPRESS REPORTING IGF::CT::IGF	\$11,786.00	\$11,786.00	2015	9/30/2015		2015 SS10781160331	0	SMALL BUSINESS
MC CORMACK, SHARON DR.	IGF::CL::IGF OMA MEDICAL CONSULTANTS. REVIEWS BY MEDICAL CONSULTANT OF DISABILITY CLAIM CASE FILES FOR AGENCY DISABILITY PROGRAM.	\$11,775.00	\$11,775.00	2016	6/1/2016		1 SS00164C032	0	SMALL BUSINESS
HERMAN MILLER, INC.	CHARLOTTE, NC ODAR #RT27 DESIGN, INSTALLATION, O	\$11,705.54	\$11,705.54	2015	7/17/2015	SS001530077		1	OTHER THAN SMALL BUSINESS
LYNNE TRACY & ASSOCIATES	VE EXPRESS REPORTING IGF::CT::IGF	\$11,689.00	\$11,689.00	2015	9/30/2015		2015 SS10881190039	0	SMALL BUSINESS
RICHMOND SANITARY SERVICE, INC.	20 YD DUMPSTER GREEN FOR EXCESSING DISPOSAL IGF::OT::IGF	\$11,688.51	\$11,688.51	2015	7/10/2015	SS091551012		0	OTHER THAN SMALL BUSINESS
DAVID J ANDERSON MD	ME EXPRESS REPORTING - MENTAL HEALTH IGF::CT::IGF	\$11,680.00	\$11,680.00	2015	9/30/2015		2015 SS10881190122	0	SMALL BUSINESS
MC MILLION, DWIGHT L	VE EXPRESS REPORTING IGF::CT::IGF	\$11,654.71	\$11,654.71	2015	9/30/2015		2015 SS10381130033	0	SMALL BUSINESS
ADMIRAL ELEVATOR COMPANY, INC.	REMOVE AND REPLACE CARPETS TILES ON THE FIFTH FLOOR OF THE EAST HIGH RISE (EHR) AT HEADQUARTERS IN WOODLAWN, MD. IGF::OT::IGF	\$11,636.67	\$11,636.67	2015	7/9/2015	SS001530706		0	SMALL BUSINESS
FRIEDMAN, GARY	IGF::CL::IGF INDEPENDENT MEDICAL REVIEWS, INCREASING QUANTITY CASE REVIEWS AND EXTENDING PERIOD OF PERFORMANCE	\$11,597.60	\$11,597.60	2016	6/6/2016		1 SS02164C010	1	SMALL BUSINESS
UNITED STATES POSTAL SERVICE	THE PURPOSE OF THIS MODIFICATION IS CHANGE THE M	\$11,520.00	\$11,520.00	2016	4/27/2016	SS031650002		3	OTHER THAN SMALL BUSINESS
COVENS-HEARY, HILDEGARDE V	VE EXPRESS REPORTING IGF::CT::IGF	\$11,502.00	\$11,502.00	2015	9/30/2015		2015 SS11501410003	0	SMALL BUSINESS
HUMPHREYS, JOHN L.	MEDICAL CONSULTANT SERVICES - PHYSICAL CASES CLOSELY ASSOCIATED TO INHERENTLY GOVERNMENTAL FUNCTION IGF::CL::IGF	\$11,481.40	\$11,481.40	2015	12/15/2014		15 SS041140048	0	SMALL BUSINESS
TRONCOSO, JUAN C MD	OMA MEDICAL CONSULTANTS. REVIEWS BY MEDICAL CONSULTANT OF DISABILITY CLAIM CASE FILES FOR AGENCY DISABILITY PROGRAM. AWARDING DR. TRONCOSO INDEPENDENT CASE REVIEWS AND NON- CASE SERVICES. IGF::CL::IGF	\$11,475.00	\$11,475.00	2016	5/31/2016		1 SS00164C048	0	SMALL BUSINESS
DR ROLAND C EINHORN MD P	OMA MEDICAL CONSULTANTS. REVIEWS BY MEDICAL CONSULTANT OF DISABILITY CLAIM CASE FILES FOR AGENCY DISABILITY PROGRAM. AWARDING DR. EINHORN INDEPENDENT CASE REVIEWS AND NON-CASE SERVICES. IGF::CL::IGF	\$11,475.00	\$11,475.00	2016	6/22/2016		1 SS00164C013	0	SMALL BUSINESS
HEALTH, TENNESSEE DEPT OF	ELECTRONIC DEATH REGISTRATION TENNESSEE THE PURPOSE OF MODIFICATION NUMBER 6 IS TO EXERCISE OPTION YEAR IV TO EXTEND THE TERM OF THE CONTRACT FROM JANUARY 1, 2016 THROUGH DECEMBER 31, 2016 FOR RECEIPT OF ELECTRONIC DEATH RECORDS.	\$0.00	\$11,440.00	2016	12/3/2015	SS001260056		6	OTHER THAN SMALL BUSINESS
DEMETRI W DRES	IGF::CL::IGF REGION 5 MEDICAL CONSULTANTS. REVIEWS BY MEDICAL CONSULTANT OF DISABILITY CLAIM CASE FILES FOR AGENCY DISABILITY PROGRAM. CALL ORDER TO DEMETRI DRES.	\$11,405.00	\$11,405.00	2016	3/21/2016		1 SS05164C010	0	SMALL BUSINESS

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Vendor Name	Description of Requirement	Action Obligation	Base and All Options Value	Fiscal Year	Date Signed	PO/Delivery Order/Task Order/Call#	Parent Contract	Mod #	Contracting Officers Business Size Selection
BARNES, LOUIS J	MEDICAL CONSULTANT SERVICES DR. LOUIS BARNES IGF::CL::IGF	\$11,405.00	\$11,405.00	2016	3/11/2016		1 SS05164C018	0	SMALL BUSINESS
LOCUM, INC.	IGF::CL::IGF CLOSELY ASSOCIATED - CALL ORDER FOR C	\$11,400.00	\$11,400.00	2016	9/26/2016		2 SS07164C014	0	SMALL BUSINESS
JOHNSON, CANDICE E MD	IGF::CL::IGF CLOSELY ASSOCIATED -NEW CALL ORDER F	\$11,400.00	\$11,400.00	2016	12/21/2015		1 SS08164C011	0	SMALL BUSINESS
WATKINS, MYRON MD	IGF::CL::IGF WATKINS- CALL ORDER - REVIEWS	\$11,347.50	\$11,347.50	2015	9/2/2015		11 SS061140035	3	SMALL BUSINESS
HERMAN MILLER, INC.	PUYALLUP, WA -DESIGN, INSTALLATION AND PRODUCT T	\$11,340.24	\$11,340.24	2016	6/6/2016	SS001630426	SS001260003	0	OTHER THAN SMALL BUSINESS
EC AMERICA, INC.	CITRIX XENAPP RENEWAL OF MAINTENANCE	\$11,250.00	\$11,250.00	2016	7/26/2016	SS001650190		0	OTHER THAN SMALL BUSINESS
HERMAN MILLER, INC.	SAN ANGELO TX DO #X822 TO ADD 1 J-11 WORKSTATION	\$11,244.84	\$11,244.84	2016	5/2/2016	SS001630349	SS001260003	0	OTHER THAN SMALL BUSINESS
HERMAN MILLER, INC.	CONWAY, SC X592 DESIGN, INSTALLATION AND PRODUC	\$11,208.35	\$11,208.35	2015	5/29/2015	SS001530549	SS001260003	0	OTHER THAN SMALL BUSINESS
HERMAN MILLER, INC.	PUEBLO, CO C883 - DESIGN, PRODUCT, AND INSTALLATIO	\$11,208.35	\$11,208.35	2015	3/30/2015	SS001530354	SS001260003	0	OTHER THAN SMALL BUSINESS
MLM, INC.	VENDOR WILL PROVIDE ONE GRANITE MONUMENT AND	\$11,205.00	\$11,205.00	2016	12/30/2015	SS001650051		0	SMALL BUSINESS
HEALTH, TENNESSEE DEPT OF	ELECTRONIC DEATH REGISTRATION - TENNESSEE	\$0.00	\$11,180.00	2015	12/15/2014	SS001260056		4	OTHER THAN SMALL BUSINESS
UNITED STATES POSTAL SERVICE	IGF::CL::IGF RENTAL RENEWAL OF NINE (9) POST OFFICE BOXES WITH THE UNITED STATES POSTAL SERVICE (USPS) FOR WILKES BARRE DATA OPERATIONS CENTER	\$11,160.00	\$11,160.00	2015	3/19/2015	SS001550092		0	OTHER THAN SMALL BUSINESS
MARBLE COMPUTER INCORPORATED	MAINTAIN MARBLE COMPUTER INC. DCD IV SOFTWARE	\$11,138.00	\$11,138.00	2016	11/10/2015	SS001650025		0	SMALL BUSINESS
MARBLE COMPUTER INCORPORATED	MAINTENANCE ON MARBLE DCD IV	\$11,138.00	\$11,138.00	2017	11/21/2016	SS001750026		0	SMALL BUSINESS
HORACE W BEDWELL	VE EXPRESS REPORTING IGF::CT::IGF	\$11,130.00	\$11,130.00	2015	9/30/2015		2015 SS10781160090	0	SMALL BUSINESS
COX PHD, ADAM J	ME EXPRESS REPORTING - MENTAL HEALTH IGF::CT::IGF	\$11,120.00	\$11,120.00	2015	9/30/2015		2015 SS11501110072	0	SMALL BUSINESS
HEALTH AND ENVIRONMENTAL CONTROL, SOUTH CAROLINA DEPARTMENT OF	ELECTRONIC DEATH REGISTRATION SOUTH CAROLINA THE PURPOSE OF MODIFICATION NUMBER 5 IS TO EXERCISE OPTION YEAR IV TO EXTEND THE TERM OF THE CONTRACT FROM JANUARY 1, 2016 THROUGH DECEMBER 31, 2016 FOR RECEIPT OF ELECTRONIC DEATH RECORDS.	\$0.00	\$11,100.00	2016	12/8/2015	SS001260054		5	OTHER THAN SMALL BUSINESS
HEALTH AND SOCIAL SERVICES, ALASKA DEPARTMENT OF	IGF::CL::IGF CLOSELY ASSOCIATED AK-SS00-12-60013 ELECTRONIC DEATH REGISTRATION DELIVERY ORDER. 3000 EDR RECORDS AT \$3.17 PER RECORD AND 1000 EDR RECORDS AT \$1.59 PER RECORD. TOTAL DELIVERY ORDER \$11,100. PERIOD OF PERFORMANCE 1/01/2016 - 12/31/2016.	\$11,100.00	\$11,100.00	2016	12/22/2015		5 SS001260013	0	OTHER THAN SMALL BUSINESS
HERMAN MILLER, INC.	MERRILLVILLE, IN DO #CD61 - DESIGN, INSTALLATION AN	\$11,094.59	\$11,094.59	2016	2/22/2016	SS001630200	SS001260003	0	OTHER THAN SMALL BUSINESS
COMCAST OF MARYLAND LIMITED PARTNERSHIP	IGF::OT::IGF BUSINESS BROADBAND INTERNET AND A SPORTS AND ENTERTAINMENT CABLE TV PACKAGE IS NEEDED FOR THE WOODLAWN FITNESS CENTER.	\$5,567.66	\$11,086.32	2015	7/7/2015	SS001550185		0	OTHER THAN SMALL BUSINESS
TECHFIRST, INC.	IGF::CT::IGF SIGN LANGUAGE INTERPRETER SERVICES AS A REASONABLE ACCOMMODATION FOR EMPLOYEES WHO ARE DEAF OR HARD OF HEARING	\$11,084.80	\$11,084.80	2017	11/29/2016	SS001650271		1	SMALL BUSINESS
BLOCK M.D., CHARLES R	ME EXPRESS REPORTING - MENTAL HEALTH IGF::CT::IGF	\$11,060.00	\$11,060.00	2015	9/30/2015		2015 SS10631150176	0	SMALL BUSINESS
MEADOWDALE MEDICAL CONSULTING, PLLC	IGF::CL::IGF MERRILL, MC, REG. 10	\$11,050.00	\$11,050.00	2016	1/7/2016		3 SS10154C000	3	SMALL BUSINESS
HERMAN MILLER, INC.	PONCE, PR DO #CA272PRODUCT FOR RECONFIGURATIO	\$11,040.59	\$11,040.59	2016	1/12/2016	SS001630134	SS001260003	0	OTHER THAN SMALL BUSINESS
TAYLOR, DONNA	VE EXPRESS REPORTING IGF::CT::IGF	\$11,002.00	\$11,002.00	2015	9/30/2015		20151 SS10541140443	0	SMALL BUSINESS
DAUGHERTY, SUSAN E.	IGF::CL::IGF REGIONAL MEDICAL CONSULTANT SERVICES - ORIENTATION REVIEWS BY MEDICAL CONSULTANT OF DISABILITY CLAIM CASE FILES FOR AGENCY DISABILITY PROGRAM.	\$11,000.00	\$11,000.00	2016	3/29/2016		1 SS06164C031	0	SMALL BUSINESS
SMITH-CORDINGLY, SANDRA	VE EXPRESS REPORTING IGF::CT::IGF	\$10,958.00	\$10,958.00	2015	9/30/2015		2015 SS10631550001	0	SMALL BUSINESS

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GREENBERG , MICHAEL K MD	OMA MEDICAL CONSULTANTS. REVIEWS BY MEDICAL CONSULTANT OF DISABILITY CLAIM CASE FILES FOR AGENCY DISABILITY PROGRAM. AWARDING DR. GREENBERG INDEPENDENT CASE REVIEWS AND NON-CASE SERVICES. ADDING HOURS.								
WELCH CONSULTING, LTD	IGF::CL::IGF	\$10,925.00	\$10,925.00	2016	8/29/2016	1	SS00164C020	1	SMALL BUSINESS
HENSEL PHELPS SERVICES LLC	IGF::CT::IGF - EXPERT WITNESS SERVICES TO PROVIDE AS	\$10,900.00	\$10,900.00	2015	3/9/2015	SS001461104		1	OTHER THAN SMALL BUSINESS
INSIGHT PUBLIC SECTOR, INC.	IGF::CT::IGF	\$10,895.00	\$10,895.00	2016	12/10/2015	SS001630087	SS001461106	0	OTHER THAN SMALL BUSINESS
LEVY, SHELDON	ASPOSE.WORDS FOR JAVA SUBSCRIPTION LICENSE ( 1 YE	\$10,885.19	\$10,885.19	2015	4/15/2015	SS001550114		0	OTHER THAN SMALL BUSINESS
PESTROL, INC.	ME EXPRESS REPORTING - MENTAL HEALTH IGF::CT::IGF	\$10,870.00	\$10,870.00	2015	9/30/2015	2015	SS10111200053	0	SMALL BUSINESS
	PEST CONTROL - BEDBUG TREATMENT STEAM, VACUUM	\$10,857.60	\$10,857.60	2016	9/9/2016	SS021650007		0	SMALL BUSINESS
HEALTH AND ENVIRONMENTAL CONTROL, SOUTH CAROLINA DEPARTMENT OF	ELECTRONIC DEATH REGISTRATION - SOUTH CAROLINA THE PURPOSE OF MODIFICATION NUMBER 4 IS TO EXERCISE OPTION YEAR THREE TO EXTEND THE TERM OF THE CONTRACT FROM JANUARY 1, 2015 THROUGH DECEMBER 31, 2015 FOR RECEIPT OF ELECTRONIC DEATH RECORDS.	\$0.00	\$10,820.00	2015	12/2/2014	SS001260054		4	OTHER THAN SMALL BUSINESS
RP VOCATIONAL REHABILITATION, LLC	VE EXPRESS REPORTING IGF::CT::IGF	\$10,796.00	\$10,796.00	2015	9/30/2015	2015	SS10381130237	0	SMALL BUSINESS
LONOWSKI, DANIEL J	ME EXPRESS REPORTING - MENTAL HEALTH IGF::CT::IGF	\$10,760.00	\$10,760.00	2015	9/30/2015	2015	SS10781160058	0	SMALL BUSINESS
DATABANK IMX LLC	RENEW MAINTENANCE ON ONBASE SOFTWARE	\$10,735.92	\$10,735.92	2017	10/5/2016	SS001750008		0	OTHER THAN SMALL BUSINESS
DONNA HUMPHRIES	VE EXPRESS REPORTING IGF::CT::IGF	\$10,715.00	\$10,715.00	2015	9/30/2015	2015	SS10781160285	0	SMALL BUSINESS
HERMAN MILLER, INC.	ST. TAMMANY, LA #BD18 - DESIGN, INSTALLATION AND #	\$10,706.64	\$10,706.64	2016	6/15/2016	SS001630469	SS001260003	0	OTHER THAN SMALL BUSINESS
D GAMBLES & ASSOCIATES, PLLC	ME EXPRESS REPORTING - MENTAL HEALTH IGF::CT::IGF	\$10,690.00	\$10,690.00	2015	9/30/2015	2015	SS10111200045	0	SMALL BUSINESS
FRANCIS B BUDA MD	MEDICAL CONTRACTOR SERVICES - PHYSICAL CASES CLOSELY ASSOCIATED TO INHERENTLY GOVERNMENTAL FUNCTION								
HERMAN MILLER, INC.	IGF::CL::IGF	\$10,661.30	\$10,661.30	2015	6/11/2015	18	SS041140055	2	SMALL BUSINESS
SUSMAN, MORRIS H	RAPID CITY, SD #A717 ADD ONE WORKSTATION - SYSTEM	\$10,643.54	\$10,643.54	2016	8/19/2016	SS001630685	SS001260003	0	OTHER THAN SMALL BUSINESS
	IGF::CL::IGF CLOSELY ASSOCIATED- NEW CALL ORDER FC	\$10,640.00	\$10,640.00	2016	12/23/2015	1	SS08164C022	0	SMALL BUSINESS
RITA MORGAN	IGF::CL::IGF REGION 2 MEDICAL CONSULTANTS. REVIEWS BY MEDICAL CONSULTANT OF DISABILITY CLAIM CASE FILES FOR AGENCY DISABILITY PROGRAM.	\$10,603.52	\$10,603.52	2016	2/29/2016	1	SS02164C005	0	SMALL BUSINESS
HEALTH, FLORIDA DEPARTMENT OF	IGF::OT::IGF OTHER FUNCTIONS FL EXERCISE OPTION YEAR 1ENUMERATION AT BIRTH (EAB) THE CONTRACTOR SHALL PROVIDE BIRTH RECORDS FOR THE PURPOSE OF OBTAINING SOCIAL SECURITY NUMBER (SSN) AT BIRTH IN ACCORDANCE WITH THE ATTACHED STATEMENT OF WORK.	\$971,082.00	\$10,584.00	2015	5/28/2015	SS001461056		1	OTHER THAN SMALL BUSINESS
ADMIRAL ELEVATOR COMPANY, INC.	IGF::OT::IGF  TASK ORDER #47 SS00-15-30668  TO REMOVE AND REPLACE CARPET IN THE ANNEX CAFE SEATING AREA.	\$10,580.82	\$10,580.82	2015	7/9/2015	SS001530668	SS001060042	0	SMALL BUSINESS
HEALTH, RHODE ISLAND DEPARTMENT OF	IGF::CL::IGF CLOSELY ASSOCIATED DC SS00-12-60019 ELECTRONIC DEATH REGISTRATION DELIVERY ORDER. 12,000 EDR RECORDS TOTAL DELIVERY ORDER \$10,560.00. PERIOD OF PERFORMANCE 1/01/2016 - 12/31/2016.	\$10,560.00	\$10,560.00	2016	12/22/2015	5	SS001260050	0	OTHER THAN SMALL BUSINESS
DALTON, CHARLES B	ME EXPRESS REPORTING - MENTAL HEALTH IGF::CT::IGF	\$10,530.00	\$10,530.00	2015	9/30/2015	2015	SS10251120084	0	SMALL BUSINESS
UPCHURCH, JAMES C	IGF::CL::IGF MODIFICATION TO ADD CASES, ADD NON-CA	\$10,524.06	\$10,524.06	2016	9/28/2016	2	SS04164C024	2	SMALL BUSINESS
STEVEN H FEINSTEIN	VE EXPRESS REPORTING IGF::CT::IGF	\$10,503.00	\$10,503.00	2015	9/30/2015	2015	SS10251120031	0	SMALL BUSINESS
BOONE W BENTON MD A PROFESSIONAL CORP	ME EXPRESS REPORTING - MENTAL HEALTH IGF::CT::IGF	\$10,450.00	\$10,450.00	2015	9/30/2015	2015	SS10881190034	0	SMALL BUSINESS

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TECHFIRST, INC.	IGF::CT::IGF SIGN LANGUAGE INTERPRETER SERVICES NE	\$10,439.10	\$10,439.10	2016	9/27/2016	SS001650200		1	SMALL BUSINESS
JAMES L GRECO MD	IGF::CL::IGF MEDICAL CONSULTANT SERVICES AWARDING DR. JAMES GRECO MEDICAL ADVISORY SERVICES AGAINST SS05-16-4C028, CALL ORDER 1	\$10,383.00	\$10,383.00	2016	3/24/2016	1	SS05164C028	0	SMALL BUSINESS
DAVIES, CORINNA	VE EXPRESS REPORTING IGF::CT::IGF	\$10,364.00	\$10,364.00	2015	9/30/2015	2015	SS10631150437	0	SMALL BUSINESS
HERMAN MILLER, INC.	FT. SMITH, AR ODAR OFFICE, SITE CODE #XX55 1 EE-11 W	\$10,362.15	\$10,362.15	2016	11/10/2015	SS001630057	SS001260003	0	OTHER THAN SMALL BUSINESS
DAVID BROWN MD	ME EXPRESS REPORTING - MENTAL HEALTH IGF::CT::IGF	\$10,340.00	\$10,340.00	2015	9/30/2015	2015	SS10881190106	0	SMALL BUSINESS
HEALTH, RHODE ISLAND DEPARTMENT OF	IGF::OT::IGF OTHER FUNCTIONS RI RECEIPT OF NON-ELECTRONIC DEATH RECORDS FOR OPTION YEAR III PERIOD OF PERFORMANCE JANUARY 1, 2015 - DECEMBER 31, 2015.	\$10,320.00	\$10,320.00	2015	12/30/2014	4	SS001260050	0	OTHER THAN SMALL BUSINESS
MOORE RESOURCES INC	VE EXPRESS REPORTING IGF::CT::IGF	\$10,294.80	\$10,294.80	2015	9/30/2015	20151	SS10781160033	0	SMALL BUSINESS
TOCCI, DR NINA E	ME EXPRESS REPORTING - MENTAL HEALTH IGF::CT::IGF	\$10,260.00	\$10,260.00	2015	9/30/2015	2015	SS10541140074	0	SMALL BUSINESS
FRANK, MICHAEL A & ASSOCIATES	VE EXPRESS REPORTING IGF::CT::IGF	\$10,253.00	\$10,253.00	2015	9/30/2015	2015	SS10881490008	0	SMALL BUSINESS
CARMEN FRATTO MD	MEDICAL CONSULTANT CONTRACTORS BLANKET PURCHASE AGREEMENT  IGF::CT::IGF	\$10,250.00	\$10,250.00	2015	1/22/2015	6	SS001140106	0	SMALL BUSINESS
JULIAN R GOLDBERG MD	MEDICAL CONSULTANT CONTRACTORS BLANKET PURCHASE AGREEMENT  IGF::CT::IGF	\$10,250.00	\$10,250.00	2015	1/22/2015	5	SS001140104	0	SMALL BUSINESS
M FOUNTAIN MD	MEDICAL CONSULTANT CONTRACTORS BLANKET PURCHASE AGREEMENT  IGF::CT::IGF	\$10,250.00	\$10,250.00	2015	1/22/2015	6	SS001140107	0	SMALL BUSINESS
ORSON, JAY M	ME EXPRESS REPORTING - MENTAL HEALTH IGF::CT::IGF	\$10,180.00	\$10,180.00	2015	9/30/2015	2015	SS11501110062	0	SMALL BUSINESS
SABREE, INC.	IGF::OT::IGF ASBESTOS REMOVAL CAGE CODE: 4KUQ1  REMOVE APPROXIMATELY 550 SQUARE FEET OF CARPET TILE AND CARPET TILE AND REPLACE APPROXIMATELY 140 SQUARE FEET OF GOVERNMENT SUPPLIED FLOOR TILE IN THE ALTMAYER BUILDING, ROOMS 518, 520, 522	\$10,170.11	\$10,170.11	2015	12/23/2014	SS001530161	SS001461113	0	SMALL BUSINESS
FEDERAL KEY LLC	KEY CONTROL SECURITY AND ACCESS INVENTORY SYSTEM	\$10,155.00	\$10,155.00	2016	2/10/2016	SS051650001		0	SMALL BUSINESS
CLINICAL PSYCHOLOGY SERVICES INC	ME EXPRESS REPORTING - MENTAL HEALTH IGF::CT::IGF	\$10,090.00	\$10,090.00	2015	9/30/2015	2015	SS10781160112	0	SMALL BUSINESS
OPTUMINSIGHT, INC.	IGF::CT::IGF ENCODERPRO SOLUTION (OPTUM) PROVIDES ACCESS TO THE ICD-9, ICD-10-CM AND PCS, CPT AND HCPCS CODES ALONG WITH CCI EDITS TO VIEW POTENTIAL BUNDLING ISSUES, LOCAL AND NATIONAL COVERAGE DETERMINATION POLICIES, CROSSWALKS FROM CPT AND HCPCS CODES TO RESPECTIVE MODIFIERS, AND IOM.PUB-100 REFERENCES	\$10,080.00	\$10,080.00	2016	8/5/2016	SS001650205		0	SMALL BUSINESS
BETH A HOYNIK	ME EXPRESS REPORTING - MENTAL HEALTH IGF::CT::IGF	\$10,053.05	\$10,053.05	2015	9/30/2015	2015	SS10631150309	0	SMALL BUSINESS
HORVATH, RUTH	VE EXPRESS REPORTING IGF::CT::IGF	\$10,049.00	\$10,049.00	2015	9/30/2015	2015	SS10541140507	0	SMALL BUSINESS
KELLY MD, JAMES M	IGF::CL::IGF MODIFICATION TO ADD CASES AND EXTEND	\$10,008.00	\$10,008.00	2016	7/29/2016	1	SS09164C060	1	SMALL BUSINESS
LYNDA.COM, INC.	IGF::OT::IGF LYNDA.COM - 100 ENTERPRISE LICENSES FOR OCOMM	\$10,000.00	\$10,000.00	2016	5/5/2016	SS001650115		0	SMALL BUSINESS

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HEALTH AND SOCIAL SERVICES, ALASKA DEPARTMENT OF	IGF::OT::IGF OTHER FUNCTIONS  THIS MODIFICATION ADDS FUNDING FOR 3,236 MORE ELECTRONIC DEATH RECORDS RECEIVED THAN ORIGINALLY ESTIMATED.  ELECTRONIC DEATH RECORDS - ALASKA	\$9,999.24	\$9,999.24	2016	11/25/2015	4	SS001260013	1	OTHER THAN SMALL BUSINESS
EXECUTIVE OFFICE OF THE GOVERNOR OF DELAWARE	IGF::OT::IGF OTHER FUNCTIONS  THIS MODIFICATION ADDS FUNDING FOR 3,236 MORE ELECTRONIC DEATH RECORDS RECEIVED THAN ORIGINALLY ESTIMATED.  ELECTRONIC DEATH RECORDS - DELAWARE	\$9,999.24	\$9,999.24	2016	11/23/2015	4	SS001260018	1	OTHER THAN SMALL BUSINESS
HEALTH AND WELFARE, IDAHO DEPARTMENT OF	IGF::OT::IGF OTHER FUNCTIONS THIS MODIFICATION ADDS FUNDING FOR 3,236 MORE ELECTRONIC DEATH RECORDS RECEIVED THAN ORIGINALLY ESTIMATED.	\$9,999.24	\$9,999.24	2016	11/19/2015	4	SS001260034	1	OTHER THAN SMALL BUSINESS
HEALTH, WASHINGTON STATE DEPARTMENT OF	IGF::CL::IGF CLOSELY ASSOCIATED ADDING ADDITINAL FUNDS FOR ELECTRONIC DEATH REGISTRATION FOR WASHINGTON STATE OPTION YEAR II	\$9,999.22	\$9,999.22	2015	6/30/2015	3	SS001260023	2	OTHER THAN SMALL BUSINESS
MCS SERVICES, INC.	IGF::CT::IGF MODIFICATION TO SS00-14-51002 TO PROVIDE ADDITIONAL FUNDING FOR CLIN 0004 (USAGE CLICKS).	\$9,956.82	\$9,956.82	2015	4/28/2015	SS001451002		2	SMALL BUSINESS
CONVERGINT TECHNOLOGIES LLC	IGF::CT::IGF SECURITY TURNSTILE MOTOR REPLACEMENT	\$9,956.37	\$9,956.37	2016	5/26/2016	SS051650006		0	SMALL BUSINESS
MUSGROVE, CHRISTINE	VE EXPRESS REPORTING IGF::CT::IGF	\$9,955.00	\$9,955.00	2015	9/30/2015	2015	SS11511480002	0	SMALL BUSINESS
ELLIOTT J GOYTIA, MD, MA	IGF::CL::IGF REGIONAL MEDICAL CONSULTANT SERVICES FOR THE SOCIAL SECURITY ADMINISTRATION. REVIEWS BY MEDICAL CONSULTANT OF DISABILITY CLAIM CASE FILES FOR AGENCY DISABILITY PROGRAM. INCREASE QUANTITY CASE REVIEWS.	\$9,940.80	\$9,940.80	2016	3/24/2016	1	SS02164C011	1	SMALL BUSINESS
TEAMSTUDIO, INC.	MAINTENANCE ON TEAM STUDIO RENEWAL OF SS00-15-	\$9,915.00	\$9,915.00	2016	3/22/2016	SS001650087		0	OTHER THAN SMALL BUSINESS
TEAMSTUDIO, INC.	RENEWAL OF PURCHASE ORDER SS00-14-51105 WITH TEAMSTUDIO, INC.  MAINTENANCE ON TEAM STUDIO SW MAINTENANCE IS NO LONGER REQUIRED ON THE FOLLOWING SOFTWARE AND PRIOR CLINS: TEAMSTUDIO CONFIGURATOR (CLIN 0003) TEAMSTUDIO UNDO (CLIN 0005) TEAMSTUDIO VALIDATOR (CLIN 0006)	\$9,915.00	\$9,915.00	2015	3/3/2015	SS001550082		0	OTHER THAN SMALL BUSINESS
DAYTNER CORPORATION, THE	DAYTNER CONSTRUCTION GROUP TO PROVIDE EMERGENCY SERVICES TO REPLACE COOLING TOWER CELL #2 GEARBOX TRANSMISSION AND ASSOCIATED COMPONENTS.	\$9,899.27	\$9,899.27	2015	9/30/2015	SS001550294		0	SMALL BUSINESS
FISCHER INTERNATIONAL SYSTEMS CORP	IGF::OT::IGF RENEWAL OF MAINTENANCE ON TAO SOFTWARE (SS00-	\$9,875.00	\$9,875.00	2016	10/19/2015	SS001650016		0	SMALL BUSINESS
HALL, WILLIAM J MD	ME EXPRESS REPORTING - MENTAL HEALTH IGF::CT::IGF	\$9,870.00	\$9,870.00	2015	9/30/2015	2015	SS11501110018	0	SMALL BUSINESS
MARILYN KINNIER	VE EXPRESS REPORTING IGF::CT::IGF	\$9,847.00	\$9,847.00	2015	9/30/2015	2015	SS10881190091	0	SMALL BUSINESS
SCOTT DAVID T	DAVID SCOTT, MC, REG. 10 ADDING CASES AND FUNDING IGF::CL::IGF CLOSELY ASSOCIATED	\$9,840.00	\$9,840.00	2016	1/13/2016	1	SS10154C009	1	SMALL BUSINESS
WINSLOW MD, RICHARD S	IGF::CL::IGF WINSLOW, MC, REG. 10	\$9,840.00	\$9,840.00	2016	1/15/2016	1	SS10154C011	4	SMALL BUSINESS
BLOOM, MICHAEL G MD	ME EXPRESS REPORTING - MENTAL HEALTH IGF::CT::IGF	\$9,810.00	\$9,810.00	2015	9/30/2015	2015	SS10881190118	0	SMALL BUSINESS



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ELLIOTT J GOYTIA, MD, MA	IGF::CL::IGF REGIONAL MEDICAL CONSULTANT SERVICES FOR THE SOCIAL SECURITY ADMINISTRATION. REVIEWS BY MEDICAL CONSULTANT OF DISABILITY CLAIM CASE FILES FOR AGENCY DISABILITY PROGRAM.	\$9,775.12	\$9,775.12	2016	1/15/2016	1	SS02164C011	0	SMALL BUSINESS
KENINGER, TRACY	VE EXPRESS REPORTING IGF::CT::IGF	\$9,744.00	\$9,744.00	2015	9/30/2015	2015	SS10691470006	0	SMALL BUSINESS
BELYEU, JAMES W, MD	IGF::CL::IGF CLOSELY ASSOCIATED - REGIONAL MEDICAL	\$9,733.80	\$9,733.80	2017	10/11/2016	2	SS04164C017	0	SMALL BUSINESS
KUPERMINC PHD, MURRAY	ME EXPRESS REPORTING - MENTAL HEALTH IGF::CT::IGF	\$9,720.00	\$9,720.00	2015	9/30/2015	2015	SS11501110070	0	SMALL BUSINESS
PAWLARCZYK PHD, DOUGLAS	ME EXPRESS REPORTING - MENTAL HEALTH IGF::CT::IGF	\$9,720.00	\$9,720.00	2015	9/30/2015	2015	SS10111200061	0	SMALL BUSINESS
VITOLO, MD, JOSEPH G.	ME EXPRESS REPORTING - MENTAL HEALTH IGF::CT::IGF	\$9,720.00	\$9,720.00	2015	9/30/2015	20151	SS10251120006	0	SMALL BUSINESS
NIKSUN INC.	NIKSUN PHONESWEEP MAINTENANCE RENEWAL	\$9,704.01	\$9,704.01	2016	4/22/2016	SS001650109		0	OTHER THAN SMALL BUSINESS
NIKSUN INC.	SANDSTORM PHONESWEEP SOFTWARE	\$9,704.00	\$9,704.00	2015	3/16/2015	SS001550079		0	SMALL BUSINESS
LEADERSHIP DIRECTORIES, INC.	ANNUAL SUBSCRIPTION RENEWAL FOR CONGRESSIONAL	\$9,674.00	\$9,674.00	2016	6/9/2016	SS001650155		0	OTHER THAN SMALL BUSINESS
HENSEL PHELPS SERVICES LLC	IGF::CT::IGF	\$9,673.00	\$9,673.00	2016	1/6/2016	SS001630120	SS001461106	0	OTHER THAN SMALL BUSINESS
FEED BACK CENTER OF OREGON	VE EXPRESS REPORTING IGF::CT::IGF	\$9,670.00	\$9,670.00	2015	9/30/2015	2015	SS11521100024	0	SMALL BUSINESS
MSDSPRO, LLC	IGF::CT::IGF MODIFICATION TO EXTEND SERVICES FOR 120 DAYS AND OBLIGATE ADDITIONAL FUNDING.	\$9,640.00	\$9,640.00	2015	6/10/2015	SS001550016		3	SMALL BUSINESS
ROBBINS, DR NOAH MD	ME EXPRESS REPORTING - MENTAL HEALTH IGF::CT::IGF	\$9,620.00	\$9,620.00	2015	9/30/2015	2015	SS10251120072	0	SMALL BUSINESS
HERMAN MILLER, INC.	LEESBURG, FL A258 DESIGN, PRODUCT AND INSTALLATIO	\$9,593.35	\$9,593.35	2016	6/16/2016	SS001630470	SS001260003	0	OTHER THAN SMALL BUSINESS
BAILEY MCCAFFERY LLC	VE EXPRESS REPORTING IGF::CT::IGF	\$9,567.00	\$9,567.00	2015	9/30/2015	2015	SS10781160111	0	OTHER THAN SMALL BUSINESS
JASINSKI PHD, EDWARD	ME EXPRESS REPORTING - MENTAL HEALTH IGF::CT::IGF	\$9,540.00	\$9,540.00	2015	9/30/2015	2015	SS10111100057	0	SMALL BUSINESS
HERMAN MILLER, INC.	LAKE CHARLES LA #B805 RECONFIGURE WORKSTATION (I	\$9,506.35	\$9,506.35	2015	3/27/2015	SS001530348	SS001260003	0	OTHER THAN SMALL BUSINESS
HERMAN MILLER, INC.	MONROE LA #B8021 - ADDITIONAL MA-01 WORKSTATIO	\$9,506.35	\$9,506.35	2015	5/29/2015	SS001530548	SS001260003	0	OTHER THAN SMALL BUSINESS
HERMAN MILLER, INC.	VENICE, FL XA14 DESIGN, INSTALLATION AND PRODUCT	\$9,506.35	\$9,506.35	2016	1/11/2016	SS001630137	SS001260003	0	OTHER THAN SMALL BUSINESS
THOMAS MAYEDA	IGF::CL::IGF CLOSELY ASSOCIATED-NEW CALL ORDER FO	\$9,500.00	\$9,500.00	2016	2/5/2016	1	SS08164C017	1	SMALL BUSINESS
FERLIC, DONALD C.	IGF::CL::IGF CLOSELY ASSOCIATED - NEW CALL ORDER F	\$9,500.00	\$9,500.00	2016	12/21/2015	1	SS08164C005	0	SMALL BUSINESS
AMERICAN SOCIETY FOR TRAINING AND DEVELOPMENT, INCORPORATED	IGF::OT::IGF ATD FORUM MEMBERSHIP RENEWAL	\$9,500.00	\$9,500.00	2015	7/3/2015	SS001550205		0	OTHER THAN SMALL BUSINESS
AMERICAN SOCIETY FOR TRAINING AND DEVELOPMENT, INCORPORATED	IGF::OT::IGF OTHER FUNCTION ASSOCIATION FOR TALENT DEVELOPMENT(ATD), FORMERLY THE AMERICAN SOCIETY FOR TRAINING AND DEVELOPMENT (ASTD), FORUM MEMBERSHIP RENEWAL.	\$9,500.00	\$9,500.00	2016	6/14/2016	SS001650151		0	OTHER THAN SMALL BUSINESS
WYOMING, DEPARTMENT OF HEALTH	ELECTRONIC DEATH REGISTRATION WYOMING THE PURPOSE OF MODIFICATION NUMBER 5 IS TO EXERCISE OPTION YEAR IV TO EXTEND THE TERM OF THE CONTRACT FROM JANUARY 1, 2016 THROUGH DECEMBER 31, 2016 FOR RECEIPT OF ELECTRONIC DEATH RECORDS.	\$0.00	\$9,475.00	2016	12/3/2015	SS001260010		5	OTHER THAN SMALL BUSINESS
HERMAN MILLER, INC.	LAGRANGE, GA C608 DESIGN, INSTALLATION AND PRODU	\$9,455.29	\$9,455.29	2017	10/28/2016	SS001730022	SS001260003	0	OTHER THAN SMALL BUSINESS
LEONARD, JOEL D	VE EXPRESS REPORTING IGF::CT::IGF	\$9,445.00	\$9,445.00	2015	9/30/2015	2015	SS10541140275	0	SMALL BUSINESS
HERMAN MILLER, INC.	SACO, ME #AA24 - ADD ON MA-95 WORKSTATION - SYST	\$9,420.35	\$9,420.35	2015	1/5/2015	SS001530195	SS001260003	0	OTHER THAN SMALL BUSINESS
ORTH, O GERALD PC, INC	ME EXPRESS REPORTING - MENTAL HEALTH IGF::CT::IGF	\$9,410.00	\$9,410.00	2015	9/30/2015	2015	SS10691270003	0	SMALL BUSINESS
SOCIETY FOR HUMAN RESOURCE MANAGEMENT	IGF::OT::IGF  EXHIBIT BOOTH RENTALS AT THE SOCIETY FOR HUMAN RESOURCE MANAGEMENT (SHRM) 2016 ANNUAL CONFERENCE&EXPOSITION. THIS CONFERENCE WILL TAKE PLACE IN WASHINGTON, DC ON JUNE 19-21,2016 AT THE WALTER E. WASHINGTON CONVENTION CENTER.	\$9,400.00	\$9,400.00	2016	3/15/2016	SS001650078		0	OTHER THAN SMALL BUSINESS

Vendor Name	Description of Requirement	Action Obligation	Base and All Options Value	Fiscal Year	Date Signed	PO/Delivery Order/Task Order/Call#	Parent Contract	Mod #	Contracting Officers Business Size Selection
	CRITICAL SPARE PARTS ARE NEEDED FOR THE ELECTRIC VEHICLE BARRIERS, WHICH ARE ANTI-TERRORISM MEASURES MANDATED BY FEDERAL STANDARDS, THAT PROTECT THE MAIN ENTRANCE TO ONE OF THE AGENCY S DATA CENTERS. THE BARRIERS ARE MEANT TO KEEP OUT ILL-INTENTIONED INDIVIDUALS MEANING TO DO HARM TO AGENCY PEOPLE AND ASSETS. SHOULD THE BARRIERS FAIL WITHOUT THE SPARE PARTS ON HAND, THIS WOULD DELAY REPAIRS AND POTENTIALLY PUT THE PEOPLE AND ASSETS AT RISK. THE MAIN PART NEEDED IS AN ELECTRIC ACTUATOR THAT RAISES AND LOWERS THE BARRIER. THE PARTS ARE CUSTOM DESIGNED BY THE ORIGINAL EQUIPMENT MANUFACTURER FOR THE VEHICLE BARRIERS AND SIMILAR PARTS MAY NOT WORK, FIT OR FUNCTION PROPERLY CAUSING ADDED TIME, COST AND MATERIALS TO BRING THE BARRIERS BACK TO FULL FUNCTIONALITY.								
RSSI BARRIERS, LLC.		\$9,381.42	\$9,381.42	2015	4/21/2015	SS001550123			0 SMALL BUSINESS
LEADERSHIP DIRECTORIES, INC.	SUBSCRIPTION RENEWAL OF CONGRESSIONAL AND FEDER	\$9,379.00	\$9,379.00	2015	7/6/2015	SS001550191			0 OTHER THAN SMALL BUSINESS
RELIABLE REHABILITATION SERVICES	VE EXPRESS REPORTING IGF::CT::IGF	\$9,369.00	\$9,369.00	2015	9/30/2015		2015	SS10631450001	0 SMALL BUSINESS
MOTEN-TRAVIS, ROSALYNN	ME EXPRESS REPORTING - MENTAL HEALTH IGF::CT::IGF	\$9,360.00	\$9,360.00	2015	9/30/2015		2015	SS10631350004	0 SMALL BUSINESS
ROBERT J NEUMAN	ME EXPRESS REPORTING - MENTAL HEALTH IGF::CT::IGF	\$9,360.00	\$9,360.00	2015	9/30/2015		2015	SS10631150229	0 SMALL BUSINESS
BARQUET, JAVIER MD	ME EXPRESS REPORTING - MENTAL HEALTH IGF::CT::IGF	\$9,330.00	\$9,330.00	2015	9/30/2015		2015	SS10541140142	0 SMALL BUSINESS
C DAVID BLAIR PHD	ME EXPRESS REPORTING - MENTAL HEALTH IGF::CT::IGF	\$9,325.00	\$9,325.00	2015	9/30/2015		2015	SS10381130052	0 SMALL BUSINESS
C. ANDERSON CONSULTING, LLC	ME EXPRESS REPORTING - MENTAL HEALTH IGF::CT::IGF	\$9,284.25	\$9,284.25	2015	9/30/2015		2015	SS10631150035	0 SMALL BUSINESS
O. S. C. VOCATIONAL SYSTEMS, INC.	VE EXPRESS REPORTING IGF::CT::IGF	\$9,184.00	\$9,184.00	2015	9/30/2015		2015	SS11521100049	0 SMALL BUSINESS
CHILD & FAMILY PSYCHOLOGY CENTER	ME EXPRESS REPORTING - MENTAL HEALTH IGF::CT::IGF	\$9,170.00	\$9,170.00	2015	9/30/2015		2015	SS10691170026	0 SMALL BUSINESS
LAURA LEVINE	VE EXPRESS REPORTING IGF::CT::IGF	\$9,160.00	\$9,160.00	2015	9/30/2015		2015	SS10881190078	0 SMALL BUSINESS
BOWEN JR, STEPHEN F	ME EXPRESS REPORTING - MENTAL HEALTH IGF::CT::IGF	\$9,140.00	\$9,140.00	2015	9/30/2015		2015	SS10691170006	0 SMALL BUSINESS
INTERMOUNTAIN WEST REHABILITATION SERVICES, INC.	VE EXPRESS REPORTING IGF::CT::IGF	\$9,124.00	\$9,124.00	2015	9/30/2015		2015	SS115111480004	0 SMALL BUSINESS
HELLER, EUGENE	IGF::CL::IGF CLOSELY ASSOCIATED REGIONAL MEDICAL C	\$9,120.00	\$9,120.00	2016	2/18/2016		1	SS08164C008	1 SMALL BUSINESS
FLANNERY JR, RAYMOND B	IGF::CL::IGF- SS01-16-4C009- FLANNERY, RAYMOND - CA	\$9,085.00	\$9,085.00	2017	11/7/2016		2	SS01164C009	0 SMALL BUSINESS
HELP/SYSTEMS, LLC	THE OFFICE OF TELECOMMUNICATIONS AND OPERATION	\$9,070.00	\$9,070.00	2015	5/11/2015	SS001550128			0 SMALL BUSINESS
LESYK CAROLEE K PHD	ME EXPRESS REPORTING - MENTAL HEALTH IGF::CT::IGF	\$9,060.00	\$9,060.00	2015	9/30/2015		2015	SS10631150156	0 SMALL BUSINESS
KENNETH N. ASHER, PH.D., P.S.	VE EXPRESS REPORTING IGF::CT::IGF	\$9,020.00	\$9,020.00	2015	9/30/2015		2015	SS11521100042	0 SMALL BUSINESS
	IGF::CL::IGF CLOSELY ASSOCIATED								
HEALTH, INDIANA DEPARTMENT OF	ADDITIONAL FUNDS FOR ELECTRONIC DEATH REGISTRATION (EDR)FOR INDIANA	\$8,999.90	\$8,999.90	2015	6/24/2015		3	SS001260035	1 OTHER THAN SMALL BUSINESS
TECHFIRST, INC.	IGF::CT::IGF SIGN LANGUAGE INTERPRETER SERVICES AS	\$8,998.52	\$8,998.52	2016	8/1/2016	SS001650214			0 SMALL BUSINESS
CONVEYOR HANDLING COMPANY, INC.	IGF::CT::IGF MODIFICATION TO EXISTING TRASH LINE IN S	\$8,973.00	\$8,973.00	2016	2/19/2016	SS001650069			0 SMALL BUSINESS
COX PHD, ADAM J	ME EXPRESS REPORTING - MENTAL HEALTH IGF::CT::IGF	\$8,960.00	\$8,960.00	2015	9/30/2015		2015	SS11501110072	0 SMALL BUSINESS
	RMC - CASE REVIEWS								
MARIE T TURNER DR	IGF::CL::IGF CLOSELY ASSOCIATED	\$8,935.00	\$8,935.00	2015	6/26/2015		10	SS011140013	1 SMALL BUSINESS
UNITED STATES POSTAL SERVICE	IGF::CT::IGF RENEWAL OF PO BOXES AND CALL SERVICE F	\$8,908.00	\$8,908.00	2016	7/14/2016	SS051650008			0 OTHER THAN SMALL BUSINESS
UNITED STATES POSTAL SERVICE	IGF::CT::IGF RENEWAL OF PO BOXES AND CALL SERVICE F	\$8,908.00	\$8,908.00	2016	9/21/2016	SS051650008			2 OTHER THAN SMALL BUSINESS
VERN ARNE	VE EXPRESS REPORTING IGF::CT::IGF	\$8,893.00	\$8,893.00	2015	9/30/2015		2015	SS11521100029	0 SMALL BUSINESS
L-SOFT SWEDEN AB	MAINTENANCE RENEWAL ON PURCHASE ORDER SS00-15	\$8,800.00	\$8,800.00	2016	10/6/2015	SS001651009			0 OTHER THAN SMALL BUSINESS
L-SOFT SWEDEN AB	RENEWAL OF SS00-16-51009 FOR MAINTENANCE ON L-S	\$8,800.00	\$8,800.00	2017	10/25/2016	SS001750015			0 OTHER THAN SMALL BUSINESS
DIAN MD, DONALD	ME EXPRESS REPORTING - MENTAL HEALTH IGF::CT::IGF	\$8,760.00	\$8,760.00	2015	9/30/2015		2015	SS10541140190	0 SMALL BUSINESS
WESTMAN ASSOCIATES	VE EXPRESS REPORTING IGF::CT::IGF	\$8,754.00	\$8,754.00	2015	9/30/2015		2015	SS10881190229	0 SMALL BUSINESS
HERMAN MILLER, INC.	DUE TO UNION NEGOTIATIONS THE REGION IS REQUEST	\$8,750.78	\$8,750.78	2017	10/26/2016	SS001730019		SS001260003	0 OTHER THAN SMALL BUSINESS
	IGF::OT::IGF								
MASSACHUSETTS MEDICAL SOCIETY	RENEWAL FOR NEW ENGLAND JOURNAL OF MEDICINE (NEJM)	\$8,750.00	\$8,750.00	2016	11/13/2015	SS001650028			0 OTHER THAN SMALL BUSINESS
THE ARC OF BALTIMORE INCORPORATED (1428)	IN SCOPE MOD TO REMOVE TREES	\$8,744.05	\$8,744.05	2015	2/25/2015	SS000860012			46 OTHER THAN SMALL BUSINESS
LARRY POLLOCK PHD & ASSOCIATES	ME EXPRESS REPORTING - MENTAL HEALTH IGF::CT::IGF	\$8,720.00	\$8,720.00	2015	9/30/2015		2015	SS10781160120	0 SMALL BUSINESS

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Vendor Name	Description of Requirement	Action Obligation	Base and All Options Value	Fiscal Year	Date Signed	PO/Delivery Order/Task Order/Call#	Parent Contract	Mod #	Contracting Officers Business Size Selection
	MEDICAL CONSULTANT CONTRACTORS BLANKET PURCHASE AGREEMENT								
CALKINS, SUSAN D	IGF::CT::IGF	\$8,700.00	\$8,700.00	2015	2/12/2015	2	SS001440010	0	SMALL BUSINESS
BLAND, SUSAN M	ME EXPRESS REPORTING - MENTAL HEALTH IGF::CT::IGF	\$8,673.25	\$8,673.25	2015	9/30/2015	2015	SS10541140072	0	SMALL BUSINESS
L L PSYCHOLOGY, PC	ME EXPRESS REPORTING - MENTAL HEALTH IGF::CT::IGF	\$8,660.00	\$8,660.00	2015	9/30/2015	2015	SS10251120110	0	SMALL BUSINESS
BETTEN MD, MICHAEL G	ME EXPRESS REPORTING - MENTAL HEALTH IGF::CT::IGF	\$8,620.00	\$8,620.00	2015	9/30/2015	2015	SS11501110028	0	SMALL BUSINESS
E HARTMAN & ASSOCIATES INC	VE EXPRESS REPORTING IGF::CT::IGF	\$8,605.00	\$8,605.00	2015	9/30/2015	2015	SS10781160089	0	SMALL BUSINESS
ARCHIE S GOLDEN MD	OMA MEDICAL CONSULTANTS. REVIEWS BY MEDICAL CONSULTANT OF DISABILITY CLAIM CASE FILES FOR AGENCY DISABILITY PROGRAM. ADDING CASE REVIEWS. IGF::CL::IGF	\$8,600.00	\$8,600.00	2017	11/28/2016	1	SS00164C062	2	SMALL BUSINESS
ARCHIE S GOLDEN MD	OMA MEDICAL CONSULTANTS. REVIEWS BY MEDICAL CONSULTANT OF DISABILITY CLAIM CASE FILES FOR AGENCY DISABILITY PROGRAM. AWARD DR. GOLDEN INDEPENDENT CASE REVIEWS AND NON-CASE SERVICES. ADDING CASE REVIEWS. IGF::CL::IGF	\$8,600.00	\$8,600.00	2016	9/7/2016	1	SS00164C062	1	SMALL BUSINESS
JACK GREENBERG MD	ME EXPRESS REPORTING - MENTAL HEALTH IGF::CT::IGF	\$8,560.00	\$8,560.00	2015	9/30/2015	2015	SS10251120030	0	SMALL BUSINESS
ANN T. KLEIN M.D., P.C.	IGF::CL::IGF CLOSELY ASSOCIATED - CALL ORDER FOR II	\$8,500.00	\$8,500.00	2016	7/29/2016	2	SS08154C000	0	SMALL BUSINESS
TELERIK INC.	TELERIK ULTIMATE DEVELOPER LICENSE	\$8,491.50	\$8,491.50	2015	3/11/2015	SS001550085		0	OTHER THAN SMALL BUSINESS
SEARLES, ALLEN	ME EXPRESS REPORTING - MENTAL HEALTH IGF::CT::IGF	\$8,487.26	\$8,487.26	2015	9/30/2015	2015	SS10631150373	0	SMALL BUSINESS
JOSEPH STEINER	ME EXPRESS REPORTING - MENTAL HEALTH IGF::CT::IGF	\$8,470.00	\$8,470.00	2015	9/30/2015	2015	SS10631150170	0	SMALL BUSINESS
BRUCE J. BILLER MD.	ME EXPRESS REPORTING - MENTAL HEALTH IGF::CT::IGF	\$8,420.00	\$8,420.00	2015	9/30/2015	2015	SS11501110026	0	SMALL BUSINESS
WHITAKER BROTHERS BUSINESS MACHINES INC	IGF::CT::IGF SERVICE LEVEL AGREEMENT - MAINTENANCE ON 17 BINDERY MACHINES IN DUPLICATING SERVICE CENTER	\$8,384.00	\$8,384.00	2016	9/6/2016	SS001650251		0	OTHER THAN SMALL BUSINESS
PCMG, INC.	THIS IS FOR THE PURCHASE OF PLUGINS TO ALIGN WITH	\$8,365.06	\$8,365.06	2015	9/21/2015	SS001550302		0	OTHER THAN SMALL BUSINESS
TELFORD TYLER JANET	ME EXPRESS REPORTING - MENTAL HEALTH IGF::CT::IGF	\$8,350.00	\$8,350.00	2015	9/30/2015	2015	SS10541340004	0	SMALL BUSINESS
DPC CONSULTING LLC	IGF::CL::IGF MODIFICATION TO ADD CASES.	\$8,340.00	\$8,340.00	2016	8/26/2016	4	SS041540002	2	SMALL BUSINESS
HERMAN MILLER, INC.	ST GEORGE, UT RAO7 DESIGN, INSTALL, ESTIMATED PROI	\$8,332.50	\$8,332.50	2016	5/3/2016	SS001530355	SS001260003	3	OTHER THAN SMALL BUSINESS
BARRICKS, MICHAEL E.MD	IGF::CL::IGF MODIFICATION TO ADD NON-CASES HOURS.	\$8,310.18	\$8,310.18	2016	8/16/2016	1	SS09164C029	2	SMALL BUSINESS
CRUZ, EDWIN M D PC	ME EXPRESS REPORTING - MENTAL HEALTH IGF::CT::IGF	\$8,310.00	\$8,310.00	2015	9/30/2015	2015	SS10381130108	0	SMALL BUSINESS
TELLA, NALINAKSHI	IGF::CL::IGF CLOSELY ASSOCIATED - CALL ORDER FOR II	\$8,302.80	\$8,302.80	2016	8/31/2016	2	SS07164C024	0	SMALL BUSINESS
WILLIAM BACKLUND MD	IGF::CL::IGF BACKLUND, MC, REG.10 ADD CASES AND FUNDING	\$8,300.00	\$8,300.00	2016	1/13/2016	1	SS10154C004	1	SMALL BUSINESS
JACKSON, DAVID MHS	VE EXPRESS REPORTING IGF::CT::IGF	\$8,300.00	\$8,300.00	2015	9/30/2015	2015	SS10541140583	0	SMALL BUSINESS
C J TURNER INC	VE EXPRESS REPORTING IGF::CT::IGF	\$8,254.00	\$8,254.00	2015	9/30/2015	2015	SS10781160079	0	SMALL BUSINESS
TIMOTHY M BOBROWSKI	ME EXPRESS REPORTING - MENTAL HEALTH IGF::CT::IGF	\$8,201.00	\$8,201.00	2015	9/30/2015	2015	SS10631150133	0	SMALL BUSINESS
HUMPHREYS, JOHN L.	MEDICAL CONSULTANT SERVICES - PHYSICAL CASES CLOSELY ASSOCIATED TO INHERENTLY GOVERNMENTAL FUNCTION IGF::CL::IGF	\$8,201.00	\$8,201.00	2015	6/1/2015	15	SS041140048	2	SMALL BUSINESS
KNOTT MD, HURLEY W	MEDICAL CONTRACTOR SERVICES - PHYSICAL CASES CLOSELY ASSOCIATED TO INHERENTLY GOVERNMENTAL FUNCTION IGF::CL::IGF FOR CLOSELY ASSOCIATED	\$8,201.00	\$8,201.00	2015	9/8/2015	12	SS041140028	1	SMALL BUSINESS
LARRY V CALDWELL MD	MEDICAL CONTRACTOR SERVICES - PHYSICAL CASES CLOSELY ASSOCIATED TO INHERENTLY GOVERNMENTAL FUNCTION IGF::CL::IGF	\$8,201.00	\$8,201.00	2015	4/28/2015	17	SS041040096	2	SMALL BUSINESS
HERBERT KUSHNER	DR. KUSHNER MODIFICATION TO ADD CASES SS00-11-40079 IGF::CT::IGF	\$8,200.00	\$8,200.00	2015	5/1/2015	6	SS001140079	1	SMALL BUSINESS

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	DR. RAMSEY MODIFICATION TO ADD CASES SS00-11-40052								
HAROLD E RAMSEY MD	IGF::CT::IGF	\$8,200.00	\$8,200.00	2015	4/15/2015		5 SS001140052	1	SMALL BUSINESS
KANG CHANG-WUK MD PA	IGF::CT::IGF NEW CALL ORDER FOR BPA 6/1/2015 DR. KANG SS00-11-40086	\$8,200.00	\$8,200.00	2015	7/15/2015		8 SS001140086	1	SMALL BUSINESS
	INDEPENDENT CASE REVIEWS SS00-11-40122 COTO.								
PEDRO J COTO MD	IGF::CL::IGF	\$8,200.00	\$8,200.00	2015	1/28/2015		6 SS001140122	0	SMALL BUSINESS
	MEDICAL CONSULTANT CONTRACTORS BLANKET PURCHASE AGREEMENT								
ARCHIE S GOLDEN MD	IGF::CT::IGF	\$8,200.00	\$8,200.00	2015	1/21/2015		6 SS001140139	0	SMALL BUSINESS
PRENTKE ROMICH COMPANY	IT SMALL PURCHASES	\$8,189.00	\$8,189.00	2015	4/14/2015	SS001550113		0	SMALL BUSINESS
LOUISE WALKER	VE EXPRESS REPORTING IGF::CT::IGF	\$8,088.00	\$8,088.00	2015	9/30/2015		2015 SS10541140647	0	SMALL BUSINESS
CHAPMAN-BLACK, CHARYSSE	VE EXPRESS REPORTING IGF::CT::IGF	\$8,055.00	\$8,055.00	2015	9/30/2015		2015 SS10541140229	0	SMALL BUSINESS
	IGF::OT::IGF  CAGE CODE: 4KUQ1  REMOVAL OF CARPET TILE/FLOOR TILE AND REPLACE OF FLOOR TILE PROVIDED BY THE GOVERNMENT IN ROOM G52 ALTMAYER BUILDING.  REMOVE APPROXIMATELY 295 SQUARE FEET OF CARPET TILE/FLOOR TILE. REPLACE APPROXIMATELY 74 SQUARE FEET OF FLOOR TILE PROVIDED BY THE GOVERNMENT.  THE CONTRACTOR WILL PROVIDE ALL LABOR, MATERIALS, EQUIPMENT, AND SUPERVISION TO REMOVE CARPET TILE IN ROOM G52 ALTMAYER BUILDING AND INSTALL GOVERNMENT PROVIDED FLOOR TILES REMOVED WHI.								
SABREE, INC.		\$8,050.31	\$8,050.31	2015	1/27/2015	SS001530233	SS001461113	0	SMALL BUSINESS
	IGF::CL::IGF REGION 2 MEDICAL CONSULTANTS. REVIEWS BY MEDICAL CONSULTANT OF DISABILITY CLAIM CASE FILES FOR AGENCY DISABILITY PROGRAM. MODIFICATION TO INCREASE QUANTITY AND EXTEND PERFORMANCE.	\$8,042.00	\$8,042.00	2015	12/5/2014		7 SS021140072	2	SMALL BUSINESS
CAMPION MD, ROBERT									
XANTHOPOULOS, LARY	IGF::CL::IGF CALL ORDER FOR 100 INDEPENDENT DISABILITY CASE REVIEWS.	\$8,041.00	\$8,041.00	2017	11/28/2016		4 SS01154C001	0	SMALL BUSINESS
SUPERIOR COMMUNICATIONS, INC.	PURCHASE OF SIX XG-25 RADIOS	\$8,010.00	\$8,010.00	2015	9/24/2015	SS001550309		0	SMALL BUSINESS
	IGF::CL::IGF REGION 3 REGIONAL MEDICAL CONTRACTOR. THE PURPOSE OF THIS AWARD IS TO ISSUE A CALL ORDER AGAINST THE CONTRACTOR'S EXISTING BPA TO PROVIDE INDEPENDENT CASE REVIEWS. IGF::CL::IGF	\$8,000.00	\$8,000.00	2016	6/3/2016		3 SS03154C023	0	SMALL BUSINESS
COBBS, WALTER									
HEALTH SERVICES, WISCONSIN DEPARTMENT OF	IGF::CL::IGF CLOSELY ASSOCIATED ADDING ADDITIONAL FUNDS FOR ELECTRONIC DEATH REGISTRATION FOR WISCONSIN STATE	\$7,997.57	\$7,997.57	2015	7/1/2015		3 SS001260059	1	OTHER THAN SMALL BUSINESS
HERMAN MILLER, INC.	JACKSONVILLE, FL IX41 PRODUCT AND INSTALLATION FO	\$7,996.00	\$7,996.00	2016	11/11/2015	SS001530759	SS001260003	1	OTHER THAN SMALL BUSINESS

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	RENEWAL OF WILKES BARRE DOC POST OFFICE BOXES TO SEPARATE TIME SENSITIVE MAIL FROM THE BULK MAIL. THE FOLLOWING WORKGROUP COMPONENTS ARE REPRESENTED. WBD0C WORKLOADS- REP PAYEE - PO BOXES 6231, 6237 MEDICARE - PO BOXES - 1080, 3600 SS STATEMENTS - PO BOX 7004 AWR, W2-C - PO BOX 3333								
UNITED STATES POSTAL SERVICE	IGF::OT::IGF	\$7,992.00	\$7,992.00	2015	7/7/2015	SS031550017		0	OTHER THAN SMALL BUSINESS
EPS REHABILITATION INC	ME EXPRESS REPORTING - MENTAL HEALTH IGF::CT::IGF	\$7,977.00	\$7,977.00	2015	9/30/2015	2015	SS10631150235	0	OTHER THAN SMALL BUSINESS
BETTY SESTAK	VE EXPRESS REPORTING IGF::CT::IGF	\$7,956.00	\$7,956.00	2015	9/30/2015	2015	SS10881190123	0	SMALL BUSINESS
	IGF::CL::IGF REGION III REGIONAL MEDICAL CONSULTANT BPA CALL ORDER AGAINST NEW RMC BPA. THE CONTRACTOR SHALL PROVIDE INDEPENDENT CASE REVIEWS UNDER THIS CALL ORDER.	\$7,950.00	\$7,950.00	2016	6/3/2016	2	SS03154C009	0	SMALL BUSINESS
GOLDSMITH, JOYCE MD									
	IGF::OT::IGF RENEWAL FOR JOURNAL OF THE AMERICAN MEDICAL ASSOCIATION (JAMA)	\$7,947.00	\$7,947.00	2016	12/29/2015	SS001650020		0	OTHER THAN SMALL BUSINESS
AMERICAN MEDICAL ASSOCIATION									
JERDA M RILEY MD	ME EXPRESS REPORTING - MENTAL HEALTH IGF::CT::IGF	\$7,940.00	\$7,940.00	2015	9/30/2015	2015	SS10631150308	0	SMALL BUSINESS
UNITED STATES POSTAL SERVICE	IGF::CT::IGF ANNUAL RENEWAL POST OFFICES BOXES	\$7,920.00	\$7,920.00	2015	8/2/2015	SS051550009		0	OTHER THAN SMALL BUSINESS
UNITED STATES POSTAL SERVICE	IGF::CT::IGF ANNUAL RENEWAL POST OFFICES BOXES	\$7,920.00	\$7,920.00	2016	10/7/2015	SS051550009		2	OTHER THAN SMALL BUSINESS
MENKEN, MARY ELLEN	IGF::CL::IGF - SS01-11-40003 - MENKEN, MARY ELLEN - R	\$7,907.00	\$7,907.00	2016	2/11/2016	9	SS011140003	0	SMALL BUSINESS
PHOENIX REHABILITATION ORGANIZATION, INC.	VE EXPRESS REPORTING IGF::CT::IGF	\$7,886.35	\$7,886.35	2015	9/30/2015	2015	SS10541440043	0	SMALL BUSINESS
BERK MD, ROBERT M	ME EXPRESS REPORTING - MENTAL HEALTH IGF::CT::IGF	\$7,850.00	\$7,850.00	2015	9/30/2015	2015	SS10251120104	0	SMALL BUSINESS
TECHFIRST, INC.	IGF::CT::IGF SIGN LANGUAGE INTERPRETER SERVICES AS	\$7,824.80	\$7,824.80	2016	9/29/2016	SS001650214		2	SMALL BUSINESS
	PG&E WILL DISABLE OUTSIDE FEEDERS TO TRANSFORMERS AND THEN WILL OPEN FUSES TO PROVIDE VISUAL CONFIRMATION OF DISCONNECT. PG&E WILL BE NOTIFIED WHEN POWER IS TO BE RE-ENERGIZED TO THE BUILDING.								
PACIFIC GAS AND ELECTRIC COMPANY	IGF::CT::IGF	\$7,800.47	\$7,800.47	2016	9/30/2016	SS091651019		0	OTHER THAN SMALL BUSINESS
EDGE INFORMATION GROUP, INC	RENEW MAINTENANCE ON EDGE PORTFOLIO MAINFRAM	\$7,800.00	\$7,800.00	2016	10/6/2015	SS001651008		0	SMALL BUSINESS
PITNEY BOWES INC.	PITNEY BOWS INK CARTRIDGE 787-1 INK UPTO 60,000 IM	\$7,783.20	\$7,783.20	2016	8/4/2016	SS001650211		0	OTHER THAN SMALL BUSINESS
LAURA M ROSCH DR	ME EXPRESS REPORTING - MENTAL HEALTH IGF::CT::IGF	\$7,769.99	\$7,769.99	2015	9/30/2015	2015	SS10631150316	0	OTHER THAN SMALL BUSINESS
KATHLEEN A O'GIEBLYN	VE EXPRESS REPORTING IGF::CT::IGF	\$7,765.00	\$7,765.00	2015	9/30/2015	2015	SS11521100037	0	SMALL BUSINESS
LAWRENCE SCHAFFZIN	ME EXPRESS REPORTING - MENTAL HEALTH IGF::CT::IGF	\$7,760.00	\$7,760.00	2015	9/30/2015	2015	SS10381130020	0	SMALL BUSINESS
	IGF::CL::IGF REGION 2 MEDICAL CONSULTANTS. REVIEWS BY MEDICAL CONSULTANT OF DISABILITY CLAIM CASE FILES FOR AGENCY DISABILITY PROGRAM. MODIFICATION TO INCREASE CASE REVIEWS.	\$7,753.90	\$7,753.90	2016	2/12/2016	15	SS021140104	3	SMALL BUSINESS
JOSE J RABELO MD									
FEDERAL PRISON INDUSTRIES INC	UNICOR FURNITURE FOR THE PHILADELPHIA REGION 3	\$7,739.55	\$7,739.55	2015	9/17/2015	SS001550290		0	OTHER THAN SMALL BUSINESS
	IGF::OT::IGF JOURNAL OF THE AMERICAN MEDICAL ASSOCIATION (JAMA) RENEWAL.	\$7,715.00	\$7,715.00	2015	12/18/2014	SS001550038		0	OTHER THAN SMALL BUSINESS
AMERICAN MEDICAL ASSOCIATION									
HENSEL PHELPS SERVICES LLC	VOIP PHONES	\$7,709.38	\$7,709.38	2015	7/10/2015	SS001530701	SS001461106	0	OTHER THAN SMALL BUSINESS
SABREE, INC.	IGF::CT::IGF	\$7,695.76	\$7,695.76	2016	9/30/2016	SS001630860	SS001461113	0	SMALL BUSINESS
SLATER, CHARLES	IGF::OT::IGF - REMOVAL OF THE EXISTING CARPET TILE, V	\$7,650.00	\$7,650.00	2015	9/30/2015	2015	SS11521401002	0	SMALL BUSINESS
KRONBERGER, CARLOS	VE EXPRESS REPORTING IGF::CT::IGF	\$7,630.00	\$7,630.00	2015	9/30/2015	2015	SS10541140090	0	SMALL BUSINESS
PITNEY BOWES INC.	ME EXPRESS REPORTING - MENTAL HEALTH IGF::CT::IGF	\$7,630.00	\$7,630.00	2015	9/30/2015	2015	SS10541140090	0	SMALL BUSINESS
MOHAUPT & SCHONDRUN CORP	PRINTER INK, PRINT HEAD, AND WEB WIPE CASSETTES	\$7,600.00	\$7,600.00	2015	1/8/2015	SS001550064		0	OTHER THAN SMALL BUSINESS
YAMANE, LANELLE	VE EXPRESS REPORTING IGF::CT::IGF	\$7,596.00	\$7,596.00	2015	9/30/2015	2015	SS10881190239	0	SMALL BUSINESS
HERMAN MILLER, INC.	VE EXPRESS REPORTING IGF::CT::IGF	\$7,591.00	\$7,591.00	2015	9/30/2015	2015	SS10881290008	0	SMALL BUSINESS
SPECTRUM SYSTEMS, LLC	HATTIESBURG, MS CX79 PRODUCT AND INSTALLER HOU	\$7,578.73	\$7,578.73	2016	11/10/2015	SS001630026	SS001260003	0	OTHER THAN SMALL BUSINESS
	RENEW MAINTENANCE FOR REDGATE SQL TOOLBELT SO	\$7,527.52	\$7,527.52	2015	5/12/2015	SS001550144		0	SMALL BUSINESS

Sole Source Contracts  
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Vendor Name	Description of Requirement	Action Obligation	Base and All Options Value	Fiscal Year	Date Signed	PO/Delivery Order/Task Order/Call#	Parent Contract	Mod #	Contracting Officers Business Size Selection
SHI INTERNATIONAL CORP.	MAINTENANCE OF JPDPFPROCESS SITE LICENSE INCLUDES	\$7,524.00	\$7,524.00	2016	4/5/2016	SS001650098		0	OTHER THAN SMALL BUSINESS
DBE SOFTWARE INC	RENEW MAINTENANCE ON DB-EXAMINER FOR ORACLE.	\$7,500.00	\$7,500.00	2016	11/19/2015	SS001650030		0	OTHER THAN SMALL BUSINESS
DAVID E. BRAVERMAN CONSULTING, INC	IGF::CL::IGF CLOSELY ASSOCIATED - CALL ORDER FOR I	\$7,488.80	\$7,488.80	2016	9/23/2016		3 SS07164C003	0	SMALL BUSINESS
EATON CORPORATION	IGF::OT::IGF POWER DOWN THEN POWER UP AGAIN THE	\$7,480.00	\$7,480.00	2016	9/29/2016	SS001630857	SS001560064	0	OTHER THAN SMALL BUSINESS
FINNEGAN, JULIE E	VE EXPRESS REPORTING IGF::CT::IGF	\$7,474.00	\$7,474.00	2015	9/30/2015		2015 SS10691170107	0	SMALL BUSINESS
TECHFIRST, INC.	IGF::CT::IGF SIGN LANGUAGE INTERPRETER SERVICES AS A REASONABLE ACCOMMODATION FOR AN EMPLOYEE WHO IS DEAF OR HARD OF HEARING	\$7,456.50	\$7,456.50	2016	9/27/2016	SS001650255		1	SMALL BUSINESS
ZONES, INC.	RED GATE SQL TOOLBELT	\$7,449.96	\$7,449.96	2016	6/8/2016	SS001650153		0	OTHER THAN SMALL BUSINESS
PUBLIC HEALTH, ILLINOIS DEPARTMENT OF	IGF::OT::IGF OTHER FUNCTIONS IL EXERCISE OPTION YEAR 1 ENUMERATION AT BIRTH (EAB) THE CONTRACTOR SHALL PROVIDE BIRTH RECORDS FOR THE PURPOSE OF OBTAINING SOCIAL SECURITY NUMBER (SSN) AT BIRTH IN ACCORDANCE WITH THE ATTACHED STATEMENT OF WORK.	\$679,757.40	\$7,408.80	2015	5/28/2015	SS001461061		1	OTHER THAN SMALL BUSINESS
RICHARD H SWEETMAN PHD	IGF::CL::IGF CLOSELY ASSOCIATED - REGIONAL MEDICA	\$7,400.00	\$7,400.00	2015	2/11/2015		10 SS081040028	1	SMALL BUSINESS
COMESS, LEONARD J	IGF::CL::IGF REGION 2 MEDICAL CONSULTANTS. REVIEWS BY MEDICAL CONSULTANT OF DISABILITY CLAIM CASE FILES FOR AGENCY DISABILITY PROGRAM. MODIFICATION TO INCREASE QUANTITY.	\$7,400.00	\$7,400.00	2015	9/11/2015		9 SS061140032	2	SMALL BUSINESS
JUSTIN WILLER MD	ME EXPRESS REPORTING - MENTAL HEALTH IGF::CT::IGF	\$7,400.00	\$7,400.00	2015	9/30/2015		2015 SS10251120100	0	OTHER THAN SMALL BUSINESS
FEDERAL PRISON INDUSTRIES INC	PURCHASE UNICOR FURNITURE AS A SOLE SOURCE VEND	\$7,377.00	\$7,377.00	2015	8/5/2015	SS051550010		0	OTHER THAN SMALL BUSINESS
SOFTCHOICE CORPORATION	EASYSOFT ODBC-SQL SVR DRVR UNL LIC	\$7,375.16	\$7,375.16	2015	6/8/2015	SS001550155		0	OTHER THAN SMALL BUSINESS
SHI INTERNATIONAL CORP.	INTRANET SMALL PURCHASES - REPLIWEB LICENSES	\$7,302.34	\$7,302.34	2015	7/30/2015	SS001550229		0	OTHER THAN SMALL BUSINESS
RAMIREZ, RICARDO J	IGF::CL::IGF- SS01-16-4C025- RAMIREZ, RICARDO- REQUI	\$7,245.60	\$7,245.60	2017	11/14/2016		2 SS01164C025	0	SMALL BUSINESS
HENSEL PHELPS SERVICES LLC	IGF::OT::IGF TASK THE O&M CONTRACTOR TO REPLACE AND REPAIR CONDENSER PUMP #7	\$7,191.60	\$7,191.60	2016	5/4/2016	SS001630322	SS001461106	0	OTHER THAN SMALL BUSINESS
SEBA PROFESSIONAL SERVICES LLC	IGF::CL::IGF CLOSELY ASSOCIATED - CALL ORDER FOR C	\$7,190.00	\$7,190.00	2016	9/26/2016		2 SS07164C022	0	SMALL BUSINESS
RAPID MODELING CORPORATION	RENEWAL OF SS00-15-50216, MAINTENANCE ON LAUBR	\$7,178.40	\$7,178.40	2016	5/3/2016	SS001650118		0	SMALL BUSINESS
BACKBONE SOLUTIONS, INC.	EMC PIX TOOLS DEV KIT SOFTWARE AND MAINTENANCE	\$7,140.00	\$7,140.00	2015	5/7/2015	SS001550112		0	SMALL BUSINESS
HERMAN MILLER, INC.	THOUSAND OAKS, CA AA09 - DESIGN, INSTALLATION AN	\$7,104.35	\$7,104.35	2015	1/6/2015	SS001431686	SS001260003	1	OTHER THAN SMALL BUSINESS
HERMAN MILLER, INC.	NEW YORK DO #B95, NY - REPLACEMENT OF SEVEN (7) T	\$7,042.26	\$7,042.26	2016	1/11/2016	SS001630135	SS001260003	0	OTHER THAN SMALL BUSINESS
PRESTON DAVIS, PSY.D. CLINICAL & FORENSIC PSYCHOLOGIST, INC.	VE EXPRESS REPORTING IGF::CT::IGF	\$7,030.00	\$7,030.00	2015	9/30/2015		2015 SS10881490003	0	SMALL BUSINESS
HERMAN MILLER, INC.	BLUEFIELD WV #G311 DESIGN, INSTALLATION SERVICES	\$7,028.00	\$7,028.00	2016	8/19/2016	SS001530737	SS001260003	2	OTHER THAN SMALL BUSINESS
HEALTH & HUMAN SERVICES, NORTH CAROLINA DEPARTMENT OF	IGF::OT::IGF OTHER FUNCTIONS THE PURPOSE OF THIS MODIFICATION IS TO ADD 8,139 DEATH RECORDS AT \$.86 PER RECORD. TOTAL ADDITION \$6,999.54.	\$6,999.54	\$6,999.54	2016	5/31/2016		4 SS001260049	1	OTHER THAN SMALL BUSINESS
SECRETARY STATE, NEW HAMPSHIRE DEPT OF	IGF::OT::IGF OTHER FUNCTIONS NH RECEIPT OF ELECTRONIC DEATH RECORDS FOR OPTION YEAR III PERIOD OF PERFORMANCE JANUARY 1, 2015 - DECEMBER 31, 2015.	\$6,998.85	\$6,998.85	2016	12/3/2015		4 SS001260030	1	OTHER THAN SMALL BUSINESS
SOUTH DAKOTA, STATE OF	IGF::OT::IGF OTHER FUNCTIONS SD RECEIPT OF ELECTRONIC DEATH RECORDS FOR OPTION YEAR IV PERIOD OF PERFORMANCE JANUARY 1, 2015 - DECEMBER 31, 2015.	\$6,998.85	\$6,998.85	2016	12/3/2015		4 SS001260055	1	OTHER THAN SMALL BUSINESS
OPEN SOFTWARE TECHNOLOGIES INC	RENEW MAINTENANCE ON REXXTOOLS/MVS SOFTWARE	\$6,988.00	\$6,988.00	2016	10/6/2015	SS001651007		0	SMALL BUSINESS
GEORGE W ROGERS JR	VE EXPRESS REPORTING IGF::CT::IGF	\$6,970.00	\$6,970.00	2015	9/30/2015		2015 SS10631150142	0	SMALL BUSINESS

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SABREE, INC.	IGF::OT::IGF CAGE CODE: 4KUQ1  REMOVE APPROXIMATELY 242 SQUARE FEET OF CARPET TILE/FLOOR TILE IN ROOM 513 OF THE ALTMAYER BUILDING. CONTRACTOR WILL REPLACE APPROXIMATELY 60 SQUARE FEET OF FLOOR TILE PROVIDED BY THE GOVERNMENT.	\$6,940.23	\$6,940.23	2015	1/2/2015	SS001530162	SS001461113	0	SMALL BUSINESS
HERMAN MILLER, INC.	PRESCOTT, AZ #1909 - REINSTALL 5 WORKSTATIONS TAKE	\$6,935.00	\$6,935.00	2017	11/21/2016	SS001730039	SS001260003	0	OTHER THAN SMALL BUSINESS
ELECTRONIC SECURITY SOLUTIONS LLC	IGF::OT::IGF RATIFICATION REQUEST FOR PAYMENT OF CCTV SECURITY MONITOR INSTALLATION SERVICES FOR THE SOUTH JERSEY HEARING OFFICE.	\$6,900.00	\$6,900.00	2015	1/14/2015	SS021550002		0	SMALL BUSINESS
BERNARD FARRELL DR	OMA MEDICAL CONSULTANTS. REVIEWS BY MEDICAL CONSULTANT OF DISABILITY CLAIM CASE FILES FOR AGENCY DISABILITY PROGRAM. ADDING NON-CASE SERVICES. IGF::CL::IGF	\$6,900.00	\$6,900.00	2016	9/12/2016	1	SS00164C014	1	SMALL BUSINESS
HEALTH, PENNSYLVANIA DEPARTMENT OF EPPSTEIN, STEPHEN, MD	IGF::OT::IGF OTHER FUNCTIONS PA EXERCISE OPTION YEAR 1 ENUMERATION AT BIRTH (EAB) CONTRACT STATE OF PENNSYLVANIA SHALL PROVIDE BIRTH RECORD INFORMATION FOR THE PURPOSE OF OBTAINING SOCIAL SECURITY NUMBERS (SSNS) FOR NEWBORNS OF PARENT(S) WHO VOLUNTARILY REQUEST TO RECEIVE SSNS THROUGH THE EAB PROCESS. ME EXPRESS REPORTING - MENTAL HEALTH IGF::CT::IGF	\$631,203.30 \$6,850.00	\$6,879.60 \$6,850.00	2015 2015	5/26/2015 9/30/2015	SS001461092 2015	SS10781160106	1 0	OTHER THAN SMALL BUSINESS SMALL BUSINESS
COMCAST OF MARYLAND LIMITED PARTNERSHIP LOCUM, INC.	IGF::OT::IGF BUSINESS BROADBAND INTERNET AND A SPORTS AND ENTERTAINMENT CABLE TV PACKAGE IS NEEDED FOR THE WOODLAWN FITNESS CENTER. IGF::CL::IGF MODIFICATION IS TO ADD ORIENTATION HO	\$6,836.28 \$6,834.80	\$6,836.28 \$6,834.80	2016 2016	9/7/2016 5/26/2016	SS001550185 1		2 1	OTHER THAN SMALL BUSINESS SMALL BUSINESS
FANCHER, IRIS MD	IGF::CL::IGF MODIFICATION TO ADD ORIENTATION HOUR	\$6,834.80	\$6,834.80	2016	3/30/2016	1	SS04164C015	2	SMALL BUSINESS
RAVIZEE, ISAAC C JR MD	IGF::CL::IGF MODIFICATION TO ADD ORIENTATION HOUR	\$6,834.80	\$6,834.80	2016	4/11/2016	1	SS04164C016	2	SMALL BUSINESS
VINOD SHAH	IGF::CL::IGF MODIFICATION TO ADD ORIENTATION HOUR	\$6,834.80	\$6,834.80	2016	4/11/2016	1	SS04164C055	1	SMALL BUSINESS
LAZAR, GEORGE PHD	ME EXPRESS REPORTING - MENTAL HEALTH IGF::CT::IGF	\$6,720.00	\$6,720.00	2015	9/30/2015	2015	SS10781160124	0	OTHER THAN SMALL BUSINESS
HEALTH, OHIO DEPARTMENT OF	IGF::OT::IGF OTHER FUNCTIONS OH EXERCISE OPTION YEAR 1 ENUMERATION AT BIRTH (EAB) CONTRACT STATE OF OHIO SHALL PROVIDE BIRTH RECORD INFORMATION FOR THE PURPOSE OF OBTAINING SOCIAL SECURITY NUMBERS (SSNS) FOR NEWBORNS OF PARENT(S) WHO VOLUNTARILY REQUEST TO RECEIVE SSNS THROUGH THE EAB PROCESS.	\$615,018.60	\$6,703.20	2015	5/26/2015	SS001461091		1	OTHER THAN SMALL BUSINESS
KELLY MD, JAMES M PSYCHOLOGICAL SERVICES PC CORP	BPA#SS09-11-40011/DR. KELLY: THIS CALL ORDER IS TO ADD 80 CASES @ \$81.70 PER CASE FOR A TOTAL COST OF \$6,536.00 AND 1.5 NON-CASE HOURS @ \$92.30 PER HOUR FOR A TOTAL COST OF \$138.45. THE TOTAL COST FOR THIS CALL ORDER IS \$6,674.45 FOR THE PERIOD OF PERFORMANCE 11/25/2015 THROUGH 02/29/2016. IGF::CL::IGF VE EXPRESS REPORTING IGF::CT::IGF	\$6,674.45 \$6,620.00	\$6,674.45 \$6,620.00	2016 2015	12/31/2015 9/30/2015	10 2015	SS091140011 SS11511180028	0 0	SMALL BUSINESS SMALL BUSINESS
HENSEL PHELPS SERVICES LLC	IGF::OT::IGF INSTALL A PROVIDED KEY BOX IN THE SECURITY CONTROL ROOM AND SUPPLY AND INSTALL ELECTRICAL WHIPS FOR CUBICIALS OUTSIDE OF THE SECURITY CONTROL ROOM.	\$6,618.00	\$6,618.00	2015	6/8/2015	SS001530523	SS001461106	0	OTHER THAN SMALL BUSINESS



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PUBLIC HEALTH, GEORGIA DEPT OF	IGF::OT::IGF OTHER FUNCTIONS GA EXERCISE OPTION YEAR 1 ENUMERATION AT BIRTH (EAB) THE CONTRACTOR SHALL PROVIDE BIRTH RECORDS FOR THE PURPOSE OF OBTAINING SOCIAL SECURITY NUMBER (SSN) AT BIRTH IN ACCORDANCE WITH THE ATTACHED STATEMENT OF WORK.	\$606,926.25	\$6,615.00	2015	5/28/2015	SS001461058		1	OTHER THAN SMALL BUSINESS
DIZON, JENNIFER	VE EXPRESS REPORTING IGF::CT::IGF	\$6,615.00	\$6,615.00	2015	9/30/2015	2015	SS10251120037	0	SMALL BUSINESS
SCHUMACHER, KEVIN	VE EXPRESS REPORTING IGF::CT::IGF	\$6,600.00	\$6,600.00	2015	9/30/2015	2015	SS11511180042	0	SMALL BUSINESS
RICHARD TAYLOR	VE EXPRESS REPORTING IGF::CT::IGF	\$6,596.00	\$6,596.00	2015	9/30/2015	2015	SS11511180051	0	SMALL BUSINESS
FORTUNE, JAMES M	VE EXPRESS REPORTING IGF::CT::IGF	\$6,537.00	\$6,537.00	2015	9/30/2015	2015	SS11511180063	0	SMALL BUSINESS
LESLIE VOCATIONAL CONSULTING	VE EXPRESS REPORTING IGF::CT::IGF	\$6,495.00	\$6,495.00	2015	9/30/2015	2015	SS10381130261	0	SMALL BUSINESS
ZUCKERMAN MD, BERNARD D	ME EXPRESS REPORTING - MENTAL HEALTH IGF::CT::IGF	\$6,480.00	\$6,480.00	2015	9/30/2015	2015	SS11501110044	0	SMALL BUSINESS
ROSE VOCATIONAL EDUCATIONAL AND TRANSITIONAL SERVICES	VE EXPRESS REPORTING IGF::CT::IGF	\$6,444.00	\$6,444.00	2015	9/30/2015	2015	SS10541440045	0	OTHER THAN SMALL BUSINESS
CATTANACH, LYNN	IGF::CL::IGF S S01-16-4C004 CATTANACH, LYNN CALL ORDER FOR 80 INDEPENDENT DISABILITY CASE REVIEWS FOR THE PERIOD OF 04/01/2016 - 03/31/2017. THE RATE OF PAY IS \$80.14 PER CASE FOR TOTAL FUNDING OF \$6,411.20.	\$6,411.20	\$6,411.20	2016	2/17/2016	1	SS01164C004	0	SMALL BUSINESS
LAWRENCE CHURCHVILLE	IGF::CL::IGF SS01-16-4C020 CHURCHVILLE, LAWRENCE REQUISITION FOR 80 INDEPENDENT DISABILITY CASE REVIEWS FOR THE PERIOD OF 04/01/2016 - 03/31/2017. THE RATE OF PAY PER CASE IS \$80.14 FOR TOTAL FUNDING OF \$6,411.20.	\$6,411.20	\$6,411.20	2016	2/17/2016	1	SS01164C020	0	SMALL BUSINESS
UNITED STATES POSTAL SERVICE	IGF::CL::IGF THE PURPOSE OF THIS AWARD IS TO RENEW WILKES BARRE, PA. POST OFFICE BOXES TO CONTINUE PROCESSING RESPECTIVE WORKLOADS.  THE PERIOD OF PERFORMANCE IS 08/01/2016 - 07/31/2017.	\$6,400.00	\$6,400.00	2016	7/12/2016	SS031650008		0	OTHER THAN SMALL BUSINESS
AI INTERNET SOLUTIONS LLC	6MAINTAIN CSE HTML VALIDATOR PRO SOFTWARE	\$6,399.00	\$6,399.00	2015	6/11/2015	SS001550165		0	SMALL BUSINESS
BRILL, ROBERT M	IGF::CL::IGF CLOSELY ASSOCIATED - NEW CALL ORDER F	\$6,393.00	\$6,393.00	2016	12/21/2015	2	SS08164C004	0	SMALL BUSINESS
SIGNET TECHNOLOGIES, INC.	IGF::CT::IGF MAINTAIN SECURITY SYSTEM AND ASSOCITED COMPONENTS LOCATED AT OFFICE OF DISABILITY ADJUDICATION AND REVIEW IN ARLINGTON, VIRGINIA 22202.	\$6,371.00	\$6,371.00	2015	1/13/2015	SS001550062		0	SMALL BUSINESS
EBERSOLD, LINDA	VE EXPRESS REPORTING IGF::CT::IGF	\$6,361.00	\$6,361.00	2015	9/30/2015	2015	SS10541140191	0	SMALL BUSINESS
PATERWIC, ROBERT	VE EXPRESS REPORTING IGF::CT::IGF	\$6,341.00	\$6,341.00	2015	9/30/2015	2015	SS11501110073	0	SMALL BUSINESS
GSA, HEARTLAND FINANCE CENTER 6BC	BSCC - OFFICE SUPPLIES	\$6,321.37	\$6,321.37	2015	6/4/2015	SS041550030		0	OTHER THAN SMALL BUSINESS
HPI/GSA - 2B, L.P.	IGF::OT::IGF - OTHER FUNCTIONS  DAYTIME CLEANING SERVICES	\$6,318.98	\$6,318.98	2015	3/13/2015	SS061452002		1	OTHER THAN SMALL BUSINESS
SERKIN, RENA	VE EXPRESS REPORTING IGF::CT::IGF	\$6,318.38	\$6,318.38	2015	9/30/2015	2015	SS10541340047	0	SMALL BUSINESS
COLEMAN MD, ALAN J	ME EXPRESS REPORTING - MENTAL HEALTH IGF::CT::IGF	\$6,300.00	\$6,300.00	2015	9/30/2015	2015	SS10881190086	0	SMALL BUSINESS
BARRATT EDWARDS INTERNATIONAL CORPORATION	RENEWAL OF MAINTENANCE ON ULTRABAC BACKUP REC	\$6,300.00	\$6,300.00	2017	10/1/2016	SS001750003		0	SMALL BUSINESS
BARANAUSKAS JR, VICTOR	VE EXPRESS REPORTING IGF::CT::IGF	\$6,293.00	\$6,293.00	2015	9/30/2015	2015	SS10381130249	0	SMALL BUSINESS
EDWARDS DR, DAVID L	ME EXPRESS REPORTING - MENTAL HEALTH IGF::CT::IGF	\$6,290.00	\$6,290.00	2015	9/30/2015	2015	SS10781160156	0	SMALL BUSINESS
STRONG CRYPTO INNOVATIONS LLC	MAINTENANCE ON NETSPARKER PROFESSIONAL	\$6,256.00	\$6,256.00	2016	2/18/2016	SS001650070		0	SMALL BUSINESS
FLATIRON'S MEDICAL CONSULTANTS, LLC.	IGF::CL::IGF CLOSELY ASSOCIATED - REGIONAL MEDICA	\$6,240.00	\$6,240.00	2016	5/17/2016	1	SS08164C006	0	SMALL BUSINESS
LOCUM, INC.	IGF::CL::IGF CLOSELY ASSOCIATED - REGIONAL MEDICA	\$6,240.00	\$6,240.00	2016	5/17/2016	1	SS08164C015	0	SMALL BUSINESS
PETZELT, JOHN	ME EXPRESS REPORTING - MENTAL HEALTH IGF::CT::IGF	\$6,220.00	\$6,220.00	2015	9/30/2015	2015	SS10541340006	0	SMALL BUSINESS
NORCON COMMUNICATIONS INC	PURCHASE WIRELESS HEADSETS TO USE WITH THE NORC	\$6,220.00	\$6,220.00	2016	9/15/2016	SS021650036		0	SMALL BUSINESS
DUNLAP REHABILITATION SERVICES	VE EXPRESS REPORTING IGF::CT::IGF	\$6,168.00	\$6,168.00	2015	9/30/2015	2015	SS11511180043	0	SMALL BUSINESS



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KANG CHANG-WUK MD PA	IGF::CT::IGF MEDICAL SERVICE CONSULTANT DR. KANG SS00-11-40086	\$6,150.00	\$6,150.00	2016	2/17/2016	8	SS001140086	3	SMALL BUSINESS
MARIA GUMBINAS	MEDICAL CONSULTANT CONTRACTORS BLANKET PURCHASE AGREEMENT IGF::CT::IGF	\$6,150.00	\$6,150.00	2015	1/21/2015	6	SS001140098	0	SMALL BUSINESS
FRIEDMAN, GARY	IGF::CL::IGF REGION 2 MEDICAL CONSULTANTS. REVIEWS BY MEDICAL CONSULTANT OF DISABILITY CLAIM CASE FILES FOR AGENCY DISABILITY PROGRAM.	\$6,121.50	\$6,121.50	2015	9/22/2015	8	SS021140080	0	SMALL BUSINESS
RITA MORGAN	IGF::CL::IGF REGION 2 MEDICAL CONSULTANTS. REVIEWS BY MEDICAL CONSULTANT OF DISABILITY CLAIM CASE FILES FOR AGENCY DISABILITY PROGRAM.	\$6,121.50	\$6,121.50	2015	2/24/2015	8	SS021140096	0	SMALL BUSINESS
NATIONAL ASSOCIATION FOR PUBLIC HEALTH STATISTICS AND INFORM	IGF::OT::IGF ISSUANCE OF TASK 3 FOR THE STATE OF TEN	\$6,102.00	\$6,102.00	2016	7/7/2016	SS001630517	SS001660002	0	OTHER THAN SMALL BUSINESS
NATIONAL ASSOCIATION FOR PUBLIC HEALTH STATISTICS AND INFORM	IGF::OT::IGF TECHNICAL ASSISTANCE AND TESTING OF STATE ELECTRONIC DEATH REGISTRATION SYSTEMS (EDRS).	\$6,102.00	\$6,102.00	2016	8/5/2016	SS001630638	SS001660002	0	OTHER THAN SMALL BUSINESS
ALLIED PUMP CORP	PURCHASE TWO ALLIED 2SA VERTICAL SUMP PUMP 1/2	\$6,100.00	\$6,100.00	2015	1/5/2015	SS001550055		0	SMALL BUSINESS
SNYDER, LYNN E	IGF::CL::IGF CLOSELY ASSOCIATED -NEW CALL ORDER FC	\$6,080.00	\$6,080.00	2016	12/23/2015	1	SS08164C021	0	SMALL BUSINESS
CATHY KROSKY	ME EXPRESS REPORTING - MENTAL HEALTH IGF::CT::IGF	\$6,080.00	\$6,080.00	2015	9/30/2015	2015	SS10631150312	0	SMALL BUSINESS
TACTICAL TECHNOLOGIES, INC.	SMALL PLAN REGION 2 - PURCHASE PORTABLE SURVEILL	\$6,058.00	\$6,058.00	2015	8/24/2015	SS021550009		0	SMALL BUSINESS
FEDERAL PRISON INDUSTRIES INC	PURCHASE HEARING OFFICE FURNITURE FOR EVANSVILL	\$6,044.38	\$6,044.38	2016	7/18/2016	SS051650010		0	OTHER THAN SMALL BUSINESS
WEIKEL, WILLIAM J MD	VE EXPRESS REPORTING IGF::CT::IGF	\$6,042.00	\$6,042.00	2015	9/30/2015	2015	SS10541140231	0	SMALL BUSINESS
NATIONAL ASSOCIATION FOR PUBLIC HEALTH STATISTICS AND INFORM	IGF::OT::IGF  ELECTRONIC DEATH REGISTRATION (EDR) CONTRACT WITH NATIONAL ASSOCIATION FOR PUBLIC HEALTH STATISTICS AND INFORMATION SYSTEMS (NAPHSIS) TO PROVIDE TECHNICAL ASSISTANCE TO STATE BUREAUS OF VITAL RECORDS.	\$6,012.00	\$6,012.00	2015	7/20/2015	SS001530753	SS001360047	0	OTHER THAN SMALL BUSINESS
NATIONAL ASSOCIATION FOR PUBLIC HEALTH STATISTICS AND INFORM	IGF::OT::IGF  ELECTRONIC DEATH REGISTRATION (EDR) CONTRACT WITH NATIONAL ASSOCIATION FOR PUBLIC HEALTH STATISTICS AND INFORMATION SYSTEMS (NAPHSIS) TO PROVIDE TECHNICAL ASSISTANCE TO COLORADO STATE BUREAU OF VITAL RECORDS.	\$6,012.00	\$6,012.00	2015	12/5/2014	SS001530149	SS001360047	0	OTHER THAN SMALL BUSINESS
NATIONAL ASSOCIATION FOR PUBLIC HEALTH STATISTICS AND INFORM	IGF::OT::IGF  ELECTRONIC DEATH REGISTRATION (EDR) CONTRACT WITH NATIONAL ASSOCIATION FOR PUBLIC HEALTH STATISTICS AND INFORMATION SYSTEMS (NAPHSIS) TO PROVIDE TECHNICAL ASSISTANCE TO THE MARYLAND STATE BUREAU OF VITAL RECORDS.	\$6,012.00	\$6,012.00	2015	3/12/2015	SS001530317	SS001360047	0	OTHER THAN SMALL BUSINESS
MASSACHUSETTS MEDICAL SOCIETY	IGF::OT::IGF RENEWAL FOR NEW ENGLAND JOURNAL OF MEDICINE (NEJM) SUBSCRIPTION	\$6,000.00	\$6,000.00	2017	11/2/2016	SS001750017		0	OTHER THAN SMALL BUSINESS
DEPARTMENT OF HEALTH UTAH	IGF::CL::IGF CLOSELY ASSOCIATED ADDING ADDITINAL FUNDS FOR ELECTRONIC DEATH REGISTRATION (EDR)FOR UTAH STATE	\$5,998.93	\$5,998.93	2015	3/11/2015	3	SS001260057	1	OTHER THAN SMALL BUSINESS
HEALTH AND WELFARE, IDAHO DEPARTMENT OF	IGF::CL::IGF CLOSELY ASSOCIATED ADDING ADDITINAL FUNDS FOR ELECTRONIC DEATH REGISTRATION (EDR)FOR IDAHO STATE	\$5,998.93	\$5,998.93	2015	3/11/2015	3	SS001260034	1	OTHER THAN SMALL BUSINESS
PUBLIC HEALTH, IOWA DEPARTMENT OF	IGF::CL::IGF CLOSELY ASSOCIATED ADDING ADDITINAL FUNDS FOR ELECTRONIC DEATH REGISTRATION (EDR)FOR IOWA STATE	\$5,998.93	\$5,998.93	2015	3/11/2015	3	SS001260041	2	OTHER THAN SMALL BUSINESS
SOUND SERVICES OF THE TRIAD INC.	VE EXPRESS REPORTING IGF::CT::IGF	\$5,970.00	\$5,970.00	2015	9/30/2015	2015	SS10541140549	0	SMALL BUSINESS

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Vendor Name	Description of Requirement	Action Obligation	Base and All Options Value	Fiscal Year	Date Signed	PO/Delivery Order/Task Order/Call#	Parent Contract	Mod #	Contracting Officers Business Size Selection
ALBERS, MICHELE J	ME EXPRESS REPORTING - MENTAL HEALTH IGF::CT::IGF	\$5,958.00	\$5,958.00	2015	9/30/2015	2015	SS10631150217	0	SMALL BUSINESS
MALLOY MD, BERNARD	ME EXPRESS REPORTING - MENTAL HEALTH IGF::CT::IGF	\$5,940.00	\$5,940.00	2015	9/30/2015	2015	SS10111100027	0	SMALL BUSINESS
	IGF::OT::IGF								
CURTIS ENGINE & EQUIPMENT, INC.	EMERGENCY GENERATOR&FIRE PUMP REPAIRS	\$5,937.71	\$5,937.71	2015	7/18/2015	SS001550220		0	OTHER THAN SMALL BUSINESS
	IGF::OT::IGF RATIFICATION OF UNAUTHORIZED COMMITMENT -- NAPHSIS PERFORMANCE OF TASK 3 (INTEGRATION OF ONLINE VERIFICATION SOFTWARE (OVS) AND TESTING OF THE FACT OF DEATH FILE) WITHOUT TASK ORDER AWARD. REPORT DELIVERABLE RECEIVED AND ACCEPTED.								
NATIONAL ASSOCIATION FOR PUBLIC HEALTH STATISTICS AND INFORM	CONTRACT #SS00-10-60114	\$5,923.20	\$5,923.20	2016	9/6/2016	SS001630730	SS001060114	0	OTHER THAN SMALL BUSINESS
	IGF::OT::IGF OTHER FUNCTIONS NC EXERCISE OPTION YEAR 1 ENUMERATION AT BIRTH (EAB) THE CONTRACTOR SHALL PROVIDE BIRTH RECORDS FOR THE PURPOSE OF OBTAINING SOCIAL SECURITY NUMBER (SSN) AT BIRTH IN ACCORDANCE WITH THE ATTACHED STATEMENT OF WORK.	\$542,187.45	\$5,909.40	2015	5/26/2015	SS001461074		1	OTHER THAN SMALL BUSINESS
HEALTH & HUMAN SERVICES, NORTH CAROLINA DEPARTMENT OF									
ROBICHAUX, DEBORAH DUCKETT	VE EXPRESS REPORTING IGF::CT::IGF	\$5,895.00	\$5,895.00	2015	9/30/2015	2015	SS10781560001	0	SMALL BUSINESS
HORWITZ MD, JEFFREY A	ME EXPRESS REPORTING - MENTAL HEALTH IGF::CT::IGF	\$5,890.00	\$5,890.00	2015	9/30/2015	2015	SS10631150068	0	SMALL BUSINESS
REEMA CONSULTING SERVICES, INC.	SSOS-09-60015 DBOPC - PRINT MAIL FACILITY TASK	\$5,875.79	\$5,875.79	2015	7/27/2015	SS001160015		17	SMALL BUSINESS
BUITRAGO, RICARDO	ME EXPRESS REPORTING - MENTAL HEALTH IGF::CT::IGF	\$5,860.00	\$5,860.00	2015	9/30/2015	2015	SS10541440002	0	SMALL BUSINESS
	IGF::CL::IGF REGION 02 MEDICAL CONSULTANTS. REGIONAL MEDICAL TRAINING IN PUERTO RICO DPU	\$5,858.67	\$5,858.67	2015	7/9/2015	16	SS021140074	0	SMALL BUSINESS
BENJAMIN CORTIJO JR MD									
PROCESSMODEL, INC.	RENEWAL OF SS00-14-51282 FOR MAINTENANCE ON PR	\$5,849.25	\$5,849.25	2015	7/9/2015	SS001550199		0	SMALL BUSINESS
JOHN R GOFF PHD	ME EXPRESS REPORTING - MENTAL HEALTH IGF::CT::IGF	\$5,830.00	\$5,830.00	2015	9/30/2015	2015	SS10541140200	0	SMALL BUSINESS
PHOENIX REHABILITATION ORGANIZATION, INC.	VE EXPRESS REPORTING IGF::CT::IGF	\$5,829.35	\$5,829.35	2015	9/30/2015	20151	SS10541440043	0	SMALL BUSINESS
MCCOWN MD, PHILLIP	ME EXPRESS REPORTING - MENTAL HEALTH IGF::CT::IGF	\$5,820.00	\$5,820.00	2015	9/30/2015	2015	SS10781160062	0	SMALL BUSINESS
	GRAB BARRIER EMERGENCY REPAIR								
FUTURENET SECURITY SOLUTIONS, LLC	IGF::CT::IGF	\$5,819.00	\$5,819.00	2015	7/20/2015	SS091551016		0	OTHER THAN SMALL BUSINESS
CHERDRON, DARRYL R	ME EXPRESS REPORTING - MENTAL HEALTH IGF::CT::IGF	\$5,800.00	\$5,800.00	2015	9/30/2015	2015	SS10631150036	0	SMALL BUSINESS
THOMAS F HOLCOMB	VE EXPRESS REPORTING IGF::CT::IGF	\$5,778.00	\$5,778.00	2015	9/30/2015	2015	SS10541140503	0	SMALL BUSINESS
TARNAY, THOMAS J MD	VE EXPRESS REPORTING IGF::CT::IGF	\$5,766.90	\$5,766.90	2015	9/30/2015	2015	SS11501110064	0	SMALL BUSINESS
	IGF::CL::IGF OMA MEDICAL CONSULTANTS. REVIEWS BY MEDICAL CONSULTANT OF DISABILITY CLAIM CASE FILES FOR AGENCY DISABILITY PROGRAM. ADDING NON-CASE SERVICES.	\$5,750.00	\$5,750.00	2016	9/19/2016	1	SS00164C032	1	SMALL BUSINESS
MC CORMACK, SHARON DR.									
JOHN W. GOULDMAN, M.D., L.L.C.	MEDICAL CONTRACTOR SERVICES - PHYSICAL CASES IGF::CL::IGF	\$5,740.70	\$5,740.70	2015	6/22/2015	12	SS041040082	1	SMALL BUSINESS
SELIGMAN, JERRY W	ME EXPRESS REPORTING - MENTAL HEALTH IGF::CT::IGF	\$5,730.00	\$5,730.00	2015	9/30/2015	2015	SS10541140032	0	SMALL BUSINESS
	IGF::OT::IGF								
HENSEL PHELPS SERVICES LLC	PDTM INVESTIGATION AND REPAIR	\$5,700.94	\$5,700.94	2016	9/29/2016	SS001630372	SS001461106	0	OTHER THAN SMALL BUSINESS
DRS MARTINEZ & MARTINEZ PC	IGF::CL::IGF CLOSELY ASSOCIATED NEW CALL ORDER F	\$5,700.00	\$5,700.00	2016	12/17/2015	1	SS08164C016	0	SMALL BUSINESS
	PERFORM PREVENTATIVE MAINTENANCE ON MAIN ELECTRICAL SWITCHGEAR AT THE FRANK HAGEL FEDERAL BUILDING ON SATURDAY, OCTOBER 8, 2016.								
MIRANDA ELECTRICAL SERVICE	IGF::CT::IGF	\$5,700.00	\$5,700.00	2016	9/27/2016	SS091651021		0	SMALL BUSINESS
OLIVER, CHARLES	VE EXPRESS REPORTING IGF::CT::IGF	\$5,682.00	\$5,682.00	2015	9/30/2015	2015	SS10631450021	0	SMALL BUSINESS
ABRAHAM, CHARLES MD, INC	ME EXPRESS REPORTING - MENTAL HEALTH IGF::CT::IGF	\$5,680.00	\$5,680.00	2015	9/30/2015	2015	SS10381130112	0	OTHER THAN SMALL BUSINESS

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PUBLIC HEALTH SOLUTIONS	IGF::OT::IGF OTHER FUNCTIONS NYC EXERCISE OPTION YEAR 1 ENUMERATION AT BIRTH (EAB) CONTRACTOR SHALL PROVIDE BIRTH RECORD INFORMATION FOR THE PURPOSE OF OBTAINING SOCIAL SECURITY NUMBERS (SSNS) FOR NEWBORNS OF PARENT(S) WHO VOLUNTARILY REQUEST TO RECEIVE SSNS THROUGH THE EAB PROCESS.	\$517,910.40	\$5,644.80	2015	5/26/2015	SS001461095		1	OTHER THAN SMALL BUSINESS
LARRY S STOKES PHD & ASSOCIATES	VE EXPRESS REPORTING IGF::CT::IGF	\$5,642.00	\$5,642.00	2015	9/30/2015	2015	SS10781160251	0	SMALL BUSINESS
NEOPOST USA INC.	IGF::OT::IGF STANDARD MAINTENANCE FOR NEOPOST F	\$5,634.12	\$5,634.12	2016	8/17/2016	SS041650003		3	OTHER THAN SMALL BUSINESS
PITNEY BOWES INC.	MAIL FACILITIES SUPPLIES FOR SSC AND NCC BUILDINGS	\$5,591.10	\$5,591.10	2015	4/7/2015	SS001550102		0	OTHER THAN SMALL BUSINESS
HERMAN MILLER, INC.	C197 OWINGS MILLS, MD - DESIGN, INSTALLATION AND	\$5,568.00	\$5,568.00	2016	3/23/2016	SS001630260	SS001260003	0	OTHER THAN SMALL BUSINESS
HEALTH RESEARCH, INC.	IGF::OT::IGF OTHER FUNCTION NY STATE ENUMERATION AT BIRTH (EAB) CONTRACTOR SHALL PROVIDE BIRTH RECORD INFORMATION FOR THE PURPOSE OF OBTAINING SOCIAL SECURITY NUMBERS (SSNS) FOR NEWBORNS OF PARENT(S) WHO VOLUNTARILY REQUEST TO RECEIVE SSNS THROUGH THE EAB PROCESS.	\$509,818.05	\$5,556.60	2015	5/26/2015	SS001461093		1	OTHER THAN SMALL BUSINESS
JUDITH K VOGELSANG	IGF::CL::IGF CLOSELY ASSOCIATED - CALL ORDER FOR N	\$5,540.40	\$5,540.40	2016	6/30/2016	2	SS07164C028	0	SMALL BUSINESS
LEE, CHARLES K	IGF::CL::IGF ADDITIONAL NON-CASE SERVICES HOURS FO	\$5,540.40	\$5,540.40	2016	7/1/2016	2	SS07164C012	1	SMALL BUSINESS
MARCIA FOSTER	IGF::CL::IGF CLOSELY ASSOCIATED - ADD ADDITIONAL NO	\$5,540.40	\$5,540.40	2016	6/30/2016	2	SS07164C005	1	SMALL BUSINESS
JAVIER TORRES	IGF::CL::IGF CLOSELY ASSOCIATED - REGIONAL MEDICAL	\$5,540.40	\$5,540.40	2016	8/1/2016	2	SS07164C027	1	SMALL BUSINESS
ATKINSON-BAKER, INC.	IGF::CT::IGF COURT REPORTER SERVICES	\$5,540.00	\$5,540.00	2015	12/4/2014	SS091551003		0	OTHER THAN SMALL BUSINESS
COMCAST OF MARYLAND LIMITED PARTNERSHIP	IGF::OT::IGF BUSINESS BROADBAND INTERNET AND A SPORTS AND ENTERTAINMENT CABLE TV PACKAGE IS NEEDED FOR THE WOODLAWN FITNESS CENTER.	\$0.00	\$5,518.66	2015	7/29/2015	SS001550185		1	OTHER THAN SMALL BUSINESS
BOLDEN, KIELA	MEDICAL CONSULTANT SERVICES IGF::CT::IGF AWARDING KIELA BOLDEN 60 INDEPENDENT CASE REVIEWS AGAINST BPA SS05-15-4C003, CALL ORDER 2.	\$5,474.40	\$5,474.40	2016	5/3/2016	2	SS05154C003	0	SMALL BUSINESS
THOMAS IPPEL, PHD	ME EXPRESS REPORTING - MENTAL HEALTH IGF::CT::IGF	\$5,450.00	\$5,450.00	2015	9/30/2015	2015	SS10631150058	0	SMALL BUSINESS
LIPSKI, MARCIA	IGF::CL::IGF- SS01-16-4C032 - LIPSKI, MARCIA- FOR NEW	\$5,434.20	\$5,434.20	2017	11/7/2016	2	SS01164C032	0	SMALL BUSINESS
PAUL A.C. GREENBERG, M.D.	ME EXPRESS REPORTING - MENTAL HEALTH IGF::CT::IGF	\$5,420.00	\$5,420.00	2015	9/30/2015	20151	SS10251120048	0	SMALL BUSINESS
ACCREDITATION COUNCIL FOR CONTINUING MEDICAL EDUCATION	ACCMC REPORT AND ACCREDITATION FEE								
TVEYES INC.	IGF::CT::IGF	\$5,400.00	\$5,400.00	2016	2/2/2016	SS001650065		0	OTHER THAN SMALL BUSINESS
HERMAN MILLER, INC.	TV EYES IS A SERVICE THAT MONITORS RADIO AND TV BR	\$5,400.00	\$5,400.00	2016	1/29/2016	SS001650052		0	SMALL BUSINESS
WALLACH, STEPHEN MD	LAKEPORT, CA AA32 - DESIGN, INSTALLATION AND PROD	\$5,322.50	\$5,322.50	2015	12/4/2014	SS001431953	SS001260003	1	OTHER THAN SMALL BUSINESS
ACCREDITATION COUNCIL FOR CONTINUING MEDICAL EDUCATION	ME EXPRESS REPORTING - MENTAL HEALTH IGF::CT::IGF	\$5,320.00	\$5,320.00	2015	9/30/2015	2015	SS10881190126	0	SMALL BUSINESS
ACCREDITATION COUNCIL FOR CONTINUING MEDICAL EDUCATION	IGF::CT::IGF ACCMC REPORT AND ACCREDITATION FEE	\$5,300.00	\$5,300.00	2015	12/30/2014	SS001550063		0	OTHER THAN SMALL BUSINESS
COMMUNITY HEALTH, MICHIGAN DEPARTMENT OF	IGF::OT::IGF OTHER FUNCTIONS MI EXERCISE OPTION YEAR 1 ENUMERATION AT BIRTH (EAB) THE CONTRACTOR SHALL PROVIDE BIRTH RECORDS FOR THE PURPOSE OF OBTAINING SOCIAL SECURITY NUMBER (SSN) AT BIRTH IN ACCORDANCE WITH THE ATTACHED STATEMENT OF WORK.	\$485,541.00	\$5,292.00	2015	5/27/2015	SS001461066		1	OTHER THAN SMALL BUSINESS
HENSEL PHELPS SERVICES LLC	IGF::OT::IGF TASK ORDER TO HAVE THE O&M CONTRACTOR INSTALL A NEW BATTERY RACK SUPPLIED BY THE GOVERNMENT.	\$5,278.02	\$5,278.02	2016	3/29/2016	SS001630261	SS001461106	0	OTHER THAN SMALL BUSINESS
MEYERS, JOHN C	VE EXPRESS REPORTING IGF::CT::IGF	\$5,270.00	\$5,270.00	2015	9/30/2015	2015	SS10881190187	0	OTHER THAN SMALL BUSINESS
PARTNERS IN REHABILITATION	VE EXPRESS REPORTING IGF::CT::IGF	\$5,258.00	\$5,258.00	2015	9/30/2015	2015	SS10881190251	0	SMALL BUSINESS

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CPC, INC	IGF::CT::IGF ANNUAL SUBSCRIPTION TO CARROLL'S GOVSEARCH. GOVSEARCH PROVIDES CONTACT AND OTHER INFORMATION FOR FEDERAL AND STATE GOVERNMENT OFFICIALS AND UPPER LEVEL EMPLOYEES.	\$5,250.00	\$5,250.00	2016	12/30/2015	SS001650032		0	SMALL BUSINESS
CPC, INC	IGF::CT::IGF THIS IS A RENEWAL OF AN ANNUAL SUBSCRIPTION TO CARROLL'S GOVSEARCH. GOVSEARCH PROVIDES CONTACT AND OTHER INFORMATION FOR FEDERAL AND STATE GOVERNMENT OFFICIALS AND UPPER LEVEL EMPLOYEES.	\$5,250.00	\$5,250.00	2015	12/19/2014	SS001550035		0	SMALL BUSINESS
DIVERSIFIED SYSTEMS	INSTALLATION OF SECURITY EQUIPMENT	\$5,250.00	\$5,250.00	2016	3/22/2016	SS041650006		0	SMALL BUSINESS
CROSS III, GEORGE LEE MD	IGF::CL::IGF CALL ORDER FOR MENTORING HOURS AND F	\$5,218.02	\$5,218.02	2016	5/3/2016	2 SS04164C039		0	SMALL BUSINESS
PESTROL, INC.	IGF::CT::IGF PEST CONTROL SERVICES AT THE ADDABBO FEDERAL BUILDING	\$5,186.00	\$5,186.00	2015	8/14/2015	SS021550008		0	SMALL BUSINESS
FLOW CONTROL INC	SOLE SOURCE, TO FLOW CONTROL, INC. TO PURCHASE A	\$5,179.00	\$5,179.00	2016	1/7/2016	SS001650040		0	SMALL BUSINESS
ROSS TECHNOLOGY CORPORATION	IGF::CT::IGF INSTALL CABINET HEATER IN BOTH DROP ARM GATES LOCATED AT THE PARKING GARAGE.	\$5,157.00	\$5,157.00	2015	3/23/2015	SS021550004		0	SMALL BUSINESS
TIS AMERICAS, INC.	RENEWAL OF MAINTENANCE ON TOP IMAGE SYSTEMS (T	\$5,133.33	\$5,133.33	2016	4/7/2016	SS001650102		0	SMALL BUSINESS
HENSEL PHELPS SERVICES LLC	IGF::OT::IGF  THE PURPOSE OF THIS REQUISITION IS FOR THE REPAIR OF ROLL-UP DOOR 1201C THAT PROVIDE ACCESS FOR THE DELIVERY AND INSTALLATION OF ELECTRICAL, MECHANICAL EQUIPMENT FROM THE WAREHOUSE LOADING DOCK. THE ROLL-UP DOOR WILL NOT OPERATE AUTOMATICALLY OR MANUALLY AND CONTRACTOR INVESTIGATIONS HAVE DETERMINED THE ISSUE TO BE A PROBLEM WITH THE SPRINGS IN THE COUNTERBALANCE BARREL. REPAIRS WILL REQUIRE THE REMOVAL OF A PORTION OF THE CEILING TILE AND GRID TO ALLOW FOR THE REMOVAL OF THE ROLL-UP DOOR WITH A FORKLIFT. THE CONTRACTOR WILL NEED TO REPLACE THE FAILED COUNTERBALANCE BARREL, REINSTALL THE DOOR, SET LIMITS AND TEST OPERATIONS.	\$5,129.76	\$5,129.76	2016	5/23/2016	SS001630383	SS001461106	0	OTHER THAN SMALL BUSINESS
UNITED STATES POSTAL SERVICE	IGF::CL::IGF THE PURPOSE OF THIS AWARD IS TO RENEW WILKES BARRE, PA. POST OFFICE BOXES TO CONTINUE PROCESSING RESPECTIVE WORKLOADS.  THE PERIOD OF PERFORMANCE IS 06/01/2016 - 05/31/2017.	\$5,120.00	\$5,120.00	2016	5/24/2016	SS031650003		0	OTHER THAN SMALL BUSINESS
HERMAN MILLER, INC.	ELIZABETHTOWN, KY C449 INSTALLER HOURS AND PROD	\$5,118.10	\$5,118.10	2015	3/30/2015	SS001530356	SS001260003	0	OTHER THAN SMALL BUSINESS
LEARNING FROM THE JOURNEY INC	IGF::CL::IGF CLOSELY ASSOCIATED -NEW CALL ORDER F	\$5,114.40	\$5,114.40	2016	12/22/2015	2 SS08164C013		0	SMALL BUSINESS
KITTY PRIEUR LLC	VE EXPRESS REPORTING IGF::CT::IGF	\$5,101.00	\$5,101.00	2015	9/30/2015	2015 SS10781160329		0	SMALL BUSINESS
SOCIETY FOR HUMAN RESOURCE MANAGEMENT	IGF::OT::IGF RENTAL OF CORNER EXHIBIT BOOTH #2066 AT THE SOCIETY FOR HUMAN RESOURCES MANAGEMENT (SHRM) 2015 ANNUAL CONFERENCE&EXPOSITION AT THE LAS VEGAS CONVENTION CENTER IN LAS VEGAS, NV FROM JUNE 28, 2015 TO JULY 1, 2015.	\$5,100.00	\$5,100.00	2015	3/26/2015	SS001550098		0	OTHER THAN SMALL BUSINESS
FRONTIER COMMUNICATIONS CORPORATION	INSTALL PHONE SYSTEM IN ELKO, NV (I55) RESIDENT STA	\$5,087.75	\$5,087.75	2015	9/22/2015	SS001550296		0	SMALL BUSINESS
SCOTT, SABINA	VE EXPRESS REPORTING IGF::CT::IGF	\$5,080.00	\$5,080.00	2015	9/30/2015	2015 SS11511180034		0	OTHER THAN SMALL BUSINESS

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HEALTH & SENIOR SERVICES, NEW JERSEY DEPARTMENT OF TINGLEY, CHARLES O PHD	IGF::OT::IGF OTHER FUNCTIONS NJ EXERCISE OPTION YEAR 1 ENUMERATION AT BIRTH (EAB) CONTRACT STATE OF NEW JERSEY SHALL PROVIDE BIRTH RECORD INFORMATION FOR THE PURPOSE OF OBTAINING SOCIAL SECURITY NUMBERS (SSNS) FOR NEWBORNS OF PARENT(S) WHO VOLUNTARILY REQUEST TO RECEIVE SSNS THROUGH THE EAB PROCESS.	\$465,311.96	\$5,071.52	2015	5/27/2015	SS001461096		1	OTHER THAN SMALL BUSINESS
	ME EXPRESS REPORTING - MENTAL HEALTH IGF::CT::IGF	\$5,054.41	\$5,054.41	2015	9/30/2015	2015	SS11501110054	0	SMALL BUSINESS
MASSACHUSETTS MEDICAL SOCIETY	IGF::CL::IGF AD IN NEW ENGLAND JOURNAL OF MEDICINE - RMC AD FOR MEDICAL CONSULTING SERVICES	\$5,040.00	\$5,040.00	2015	7/21/2015	SS011550002		0	OTHER THAN SMALL BUSINESS
CENTER FOR PERSONAL PROTECTION AND SAFETY INC	ANNUAL ENTERPRISE LICENSE AGREEMENT FOR FLASHPC	\$5,025.00	\$5,025.00	2015	6/24/2015	SS001550181		0	SMALL BUSINESS
RICOH PRODUCTION PRINT SOLUTIONS LLC	IBM AFP2WEB TRANSFORM MAINTENANCE RENEWAL	\$5,000.00	\$5,000.00	2015	6/30/2015	SS001550160		0	OTHER THAN SMALL BUSINESS
HEALTH LEVEL SEVEN INTERNATIONAL INC.	IGF::OT::IGF HEALTH LEVEL SEVEN (HL7) MEMBERSHIP RENEWAL	\$5,000.00	\$5,000.00	2015	7/11/2015	SS001550204		0	OTHER THAN SMALL BUSINESS
KRAMER MD, CLARK	ME EXPRESS REPORTING - MENTAL HEALTH IGF::CT::IGF	\$5,000.00	\$5,000.00	2015	9/30/2015	2015	SS10631150314	0	SMALL BUSINESS
RICOH PRODUCTION PRINT SOLUTIONS LLC	RENEWAL OF SS00-15-50160 FOR MAINTENANCE ON IBN	\$5,000.00	\$5,000.00	2016	6/14/2016	SS001650156		0	OTHER THAN SMALL BUSINESS
TENACITY, INC.	THE PROCUREMENT OF A NEW TEXT OVER INTERNET PR	\$5,000.00	\$5,000.00	2015	9/2/2015	SS001560035		1	SMALL BUSINESS
HEALTH, TENNESSEE DEPT OF	IGF::CL::IGF CLOSELY ASSOCIATED EDR OPTION YEAR II FOR TENNESSEE. ADD ADDITIONAL RECORDS AND FUNDS.	\$4,999.68	\$4,999.68	2016	12/9/2015	3	SS001260056	1	OTHER THAN SMALL BUSINESS
CHFS-DEPARTMENT FOR COMMUNITY BASED SERVICES	IGF::OT::IGF OTHER FUNCTIONS THIS MODIFICATION ADDS FUNDING FOR 1,618 MORE ELECTRONIC DEATH RECORDS RECEIVED THAN ORIGINALLY ESTIMATED.	\$4,999.62	\$4,999.62	2016	11/19/2015	3	SS001260039	1	OTHER THAN SMALL BUSINESS
HERMAN MILLER, INC.	WEST COVINA, CA #Z943 - DE-INSTALL (2) WORKSTATION	\$4,998.00	\$4,998.00	2015	6/23/2015	SS001530649		0	OTHER THAN SMALL BUSINESS
SHI INTERNATIONAL CORP.	MAINTENANCE ON SHAREGATE LITE MIGRATION TOOL	\$4,995.00	\$4,995.00	2016	5/20/2016	SS001650125		0	OTHER THAN SMALL BUSINESS
COTTONE, JERRY	ME EXPRESS REPORTING - MENTAL HEALTH IGF::CT::IGF	\$4,990.00	\$4,990.00	2015	9/30/2015	2015	SS10251120130	0	SMALL BUSINESS
GERALD P KOOCHER	ME EXPRESS REPORTING - MENTAL HEALTH IGF::CT::IGF	\$4,980.00	\$4,980.00	2015	9/30/2015	2015	SS11501110022	0	SMALL BUSINESS
WEISS PHD, WILLIAM U	VE EXPRESS REPORTING IGF::CT::IGF	\$4,970.00	\$4,970.00	2015	9/30/2015	2015	SS11521100020	0	SMALL BUSINESS
HUGH R MACMAHON MD	IGF::CL::IGF HUGH MACMAHON, MC, REG. 10 ADDITION AND FUNDING OF INDEPENDENT CASE REVIEWS	\$4,967.40	\$4,967.40	2015	5/20/2015	8	SS101140010	0	SMALL BUSINESS
DENISE L DAVIS MD	ME EXPRESS REPORTING - MENTAL HEALTH IGF::CT::IGF	\$4,960.00	\$4,960.00	2015	9/30/2015	2015	SS10631150046	0	SMALL BUSINESS
UNITED STATES POSTAL SERVICE	TO RENEW PO BOX RENTALS FOR JUNE	\$4,960.00	\$4,960.00	2015	4/30/2015	SS031550008		0	OTHER THAN SMALL BUSINESS
FEDERAL GROUP INC	IGF::CL::IGF	\$4,948.00	\$4,948.00	2015	8/26/2015	SS001550260		0	OTHER THAN SMALL BUSINESS
SABREE, INC.	IGF::OT::IGF THE CONTRACTOR WILL PROVIDE ALL LABO	\$4,933.16	\$4,933.16	2016	9/6/2016	SS001630725		0	SMALL BUSINESS
OLIVER, GEORGE C	ME EXPRESS REPORTING - MENTAL HEALTH IGF::CT::IGF	\$4,930.00	\$4,930.00	2015	9/30/2015	2015	SS10691170028	0	SMALL BUSINESS
JIDE SOFTWARE, INC	JIDE SOFTWARE INC. ULTIMATE SUITE AND DEVELOPER L	\$4,899.94	\$4,899.94	2016	12/22/2015	SS001650038		0	OTHER THAN SMALL BUSINESS
JIDE SOFTWARE, INC	RENEWAL OF SS00-14-51037 - MAINTENANCE OF JIDE SC	\$4,899.94	\$4,899.94	2015	12/24/2014	SS001550060		0	SMALL BUSINESS
LINKEDIN CORPORATION	LYNDA.COM IS ONLINE TRAINING THAT PROVIDES A LEA	\$4,820.16	\$4,820.16	2016	7/5/2016	SS001650174		0	OTHER THAN SMALL BUSINESS
TOCCI, DR NINA E	ME EXPRESS REPORTING - MENTAL HEALTH IGF::CT::IGF	\$4,816.00	\$4,816.00	2015	9/30/2015	20151	SS10541140074	0	SMALL BUSINESS
TIME WARNER CABLE INC.	IGF::OT::IGF CABLE TV SERVICES FOR SECOND SUPPORT CENTER IN DURHAM, N.C.	\$4,799.64	\$4,799.64	2015	7/27/2015	SS001250190		3	OTHER THAN SMALL BUSINESS
TIME WARNER CABLE INC.	IGF::OT::IGF CABLE TV SERVICES FOR SECOND SUPPORT CENTER IN DURHAM, N.C.	\$4,799.64	\$4,799.64	2016	6/17/2016	SS001250190		4	OTHER THAN SMALL BUSINESS
PAULINE PEGRAM-WARGEL	ME EXPRESS REPORTING - MENTAL HEALTH IGF::CT::IGF	\$4,789.00	\$4,789.00	2015	9/30/2015	20151	SS10631150349	0	SMALL BUSINESS
HEALTH, VIRGINIA DEPARTMENT OF	IGF::OT::IGF OTHER FUNCTIONS VA EXERCISE OPTION YEAR 1 ENUMERATION AT BIRTH (EAB) CONTRACT STATE OF VIRGINIA SHALL PROVIDE BIRTH RECORD INFORMATION FOR THE PURPOSE OF OBTAINING SOCIAL SECURITY NUMBERS (SSNS) FOR NEWBORNS OF PARENT(S) WHO VOLUNTARILY REQUEST TO RECEIVE SSNS THROUGH THE EAB PROCESS.	\$436,986.90	\$4,762.80	2015	5/21/2015	SS001461087		1	OTHER THAN SMALL BUSINESS

Sole Source Contracts  
(December 1, 2014 - December 1, 2016)

Vendor Name	Description of Requirement	Action Obligation	Base and All Options Value	Fiscal Year	Date Signed	PO/Delivery Order/Task Order/Call#	Parent Contract	Mod #	Contracting Officers Business Size Selection
STIGALL, TOMMY T., PHD	VE EXPRESS REPORTING IGF::CT::IGF	\$4,750.00	\$4,750.00	2015	9/30/2015	2015	SS10781160022	0	SMALL BUSINESS
NATIONAL ASSOCIATION FOR PUBLIC HEALTH STATISTICS AND INFORM	IGF::OT::IGF ELECTRONIC DEATH REGISTRATION (EDR) CONTRACT WITH NATIONAL ASSOCIATION FOR PUBLIC HEALTH STATISTICS AND INFORMATION SYSTEMS (NAPHSIS) TO PROVIDE TECHNICAL ASSISTANCE TO STATE BUREAUS OF VITAL RECORDS.	\$4,738.00	\$4,738.00	2016	8/31/2016	SS001630711	SS001660002	0	OTHER THAN SMALL BUSINESS
NATIONAL ASSOCIATION FOR PUBLIC HEALTH STATISTICS AND INFORM	IGF::OT::IGF TESTING AND TECHNICAL ASSISTANCE FOR STATES IMPLEMENTING ELECTRONIC DEATH REGISTRATION SYSTEM - TASK ORDER SS00-16-30825	\$4,738.00	\$4,738.00	2016	9/21/2016	SS001630825	SS001660002	0	OTHER THAN SMALL BUSINESS
HERMAN MILLER, INC.	SYSTEMS FURNITURE CONTRACT	\$4,711.00	\$4,711.00	2015	12/17/2014	SS001260003		25	OTHER THAN SMALL BUSINESS
ELIXIR TECHNOLOGIES CORPORATION	ELIXIR DESIGNPRO TOOLS FOR AFP MIGRATION	\$4,697.00	\$4,697.00	2015	7/9/2015	SS001550202		0	SMALL BUSINESS
MODULAR SPACE CORPORATION	RENTAL OF MODULAR OFFICE FOR THE SELLS, AZ RESIDE	\$4,695.84	\$4,695.84	2016	7/11/2016	SS091652003		0	OTHER THAN SMALL BUSINESS
DIAMOND COMMUNICATIONS INC	UPGRADING OF SECURITY SYSTEM IGF::CL::IGF CLOSELY ASSOCIATED	\$4,676.71	\$4,676.71	2015	9/18/2015	SS091552008		0	SMALL BUSINESS
NATIONAL ASSOCIATION FOR PUBLIC HEALTH STATISTICS AND INFORM	IGF::OT::IGF ELECTRONIC DEATH REGISTRATION (EDR) CONTRACT WITH NATIONAL ASSOCIATION FOR PUBLIC HEALTH STATISTICS AND INFORMATION SYSTEMS (NAPHSIS) TO PROVIDE TECHNICAL ASSISTANCE TO STATE BUREAUS OF VITAL RECORDS.	\$4,668.00	\$4,668.00	2015	5/8/2015	SS001530469	SS001360047	0	OTHER THAN SMALL BUSINESS
NATIONAL ASSOCIATION FOR PUBLIC HEALTH STATISTICS AND INFORM	IGF::OT::IGF ELECTRONIC DEATH REGISTRATION (EDR) CONTRACT WITH NATIONAL ASSOCIATION FOR PUBLIC HEALTH STATISTICS AND INFORMATION SYSTEMS (NAPHSIS) TO PROVIDE TECHNICAL ASSISTANCE TO THE NEW MEXICO STATE BUREAU OF VITAL RECORDS.	\$4,668.00	\$4,668.00	2015	2/9/2015	SS001530256	SS001360047	0	OTHER THAN SMALL BUSINESS
JUSINO-BERRIOS, CARLOS M	IGF::CL::IGF REGION 02 MEDICAL CONSULTANTS. PROVIDE MEDICAL TRAINING IN PUERTO RICO DPU	\$4,664.24	\$4,664.24	2015	7/10/2015	14	SS021140086	0	SMALL BUSINESS
DAVIS ROBERT WM PHD	VE EXPRESS REPORTING IGF::CT::IGF	\$4,640.00	\$4,640.00	2015	9/30/2015	2015	SS11521100068	0	SMALL BUSINESS
HEALTH SERVICES, ARIZONA DEPT OF	IGF::OT::IGF OTHER FUNCTIONS AZ EXERCISE OPTION YEAR 1 ENUMERATION AT BIRTH (EAB) ATHE CONTRACTOR SHALL PROVIDE BIRTH RECORDS FOR THE PURPOSE OF OBTAINING SOCIAL SECURITY NUMBER (SSN) AT BIRTH IN ACCORDANCE WITH THE ATTACHED STATEMENT OF WORK.	\$424,850.21	\$4,630.52	2015	5/19/2015	SS001461051		1	OTHER THAN SMALL BUSINESS
HERMAN MILLER, INC.	CASA GRANDE, AZ R903 - MISSING PRODUCT AND INSTA	\$4,629.00	\$4,629.00	2016	11/18/2015	SS001630069	SS001260003	0	OTHER THAN SMALL BUSINESS
SAMLASKA REHABILITATION SERVICES	ME EXPRESS REPORTING - MENTAL HEALTH IGF::CT::IGF	\$4,618.00	\$4,618.00	2015	9/30/2015	2015	SS10631150219	0	SMALL BUSINESS
DAVID O. HILL, PH.D., P.A.	IGF::CL::IGF CLOSELY ASSOCIATED - REGIONAL MEDICAL	\$4,617.00	\$4,617.00	2016	7/7/2016	1	SS07164C006	1	SMALL BUSINESS
KRAVITZ, ALAN DR	ME EXPRESS REPORTING - MENTAL HEALTH IGF::CT::IGF	\$4,610.00	\$4,610.00	2015	9/30/2015	20151	SS10631150336	0	SMALL BUSINESS
SHI INTERNATIONAL CORP.	RENEW MAINTENANCE FOR TECHSMITH SOFTWARE.	\$4,571.55	\$4,571.55	2015	3/2/2015	SS001550076		0	OTHER THAN SMALL BUSINESS
CREATIVE LOGISTICS SOLUTIONS, INC.	RENEWAL OF ANNUAL INFOSHIP SOFTWARE UPDATE AG	\$4,570.00	\$4,570.00	2016	3/7/2016	SS001650073		0	SMALL BUSINESS
HEMANTHA SURATH MD	IGF::CL::IGF MEDICAL CONSULTANT SERVICES- REGION 5 AWARDING DR. HEMANTHA SURATH INDEPENDENT CASE REVIEWS AGAINST SS05-16-4C026, CALL ORDER 1.	\$4,562.00	\$4,562.00	2016	5/4/2016	1	SS05164C026	1	SMALL BUSINESS
DUNBAR, DAVID	ME EXPRESS REPORTING - MENTAL HEALTH IGF::CT::IGF	\$4,560.00	\$4,560.00	2015	9/30/2015	2015	SS10631150288	0	SMALL BUSINESS
EXPERIAN MARKETING SOLUTIONS, INC.	EXPERIAN NAMESEARCH LICENSES	\$4,529.36	\$4,529.36	2016	11/30/2015	SS001650026		0	OTHER THAN SMALL BUSINESS
SHI INTERNATIONAL CORP.	SOCIAL SECURITY ADMINISTRATION'S OFFICE OF THE INS	\$4,528.30	\$4,528.30	2016	1/11/2016	SS001650055		0	OTHER THAN SMALL BUSINESS
PENNSYLVANIA - AMERICAN WATER COMPANY	IGF::OT::IGF PROVIDE ADDITIONAL FUNDING THROUGH	\$4,500.00	\$4,500.00	2016	7/21/2016	SS001550211		1	OTHER THAN SMALL BUSINESS

Sole Source Contracts  
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Vendor Name	Description of Requirement	Action Obligation	Base and All Options Value	Fiscal Year	Date Signed	PO/Delivery Order/Task Order/Call#	Parent Contract	Mod #	Contracting Officers Business Size Selection
NEXUM, INC.	IGF::CT::IGF PURCHASING CLOUDERA DEVELOPER TRAINING FOR APACHE HADOOP TO ENABLE DEVELOPERS TO MORE FULLY USE THE HADOOP CLUSTER FOR ATSNA AND THE ENTERPRISE DATA WAREHOUSE.	\$4,490.00	\$4,490.00	2015	8/4/2015	SS001550243		0	OTHER THAN SMALL BUSINESS
B.S. ENVIRONMENTAL, INC.	THIS IS A DELIVERY ORDER TO BE ISSUED AGAINST CONT	\$4,470.00	\$4,470.00	2015	12/4/2014	SS001530138	SS001461041	0	SMALL BUSINESS
HERMAN MILLER, INC.	RAPID CITY, SD #BW717 - INSTALLATION AND PRODUCT	\$4,464.10	\$4,464.10	2016	3/7/2016	SS001630218	SS001260003	0	OTHER THAN SMALL BUSINESS
RICHARD H SWEETMAN PHD	IGF::CL::IGF CLOSELY ASSOCIATED - REGIONAL MEDICA	\$4,440.00	\$4,440.00	2015	1/15/2015		SS081040028	0	SMALL BUSINESS
ALKA BISHNOI MD	IGF::CL::IGF REGION 2 MEDICAL CONSULTANTS. REVIEWS BY MEDICAL CONSULTANT OF DISABILITY CLAIM CASE FILES FOR AGENCY DISABILITY PROGRAM. MODIFICATION TO ADD CASES.	\$4,423.10	\$4,423.10	2016	11/25/2015		SS021140001	3	SMALL BUSINESS
LYME COMPUTER SYSTEMS, INC.	RENEW MAINTENANCE FOR MATHWORKS MATLAB.	\$4,402.20	\$4,402.20	2016	3/3/2016	SS001650076		0	SMALL BUSINESS
HERMAN MILLER, INC.	SAN JUAN, PR #AE04 SYSTEMS FURNITURE DESIGN, INST	\$4,370.78	\$4,370.78	2015	4/17/2015	SS001432040	SS001260003	2	OTHER THAN SMALL BUSINESS
SASSANO, JOHN M	ME EXPRESS REPORTING - MENTAL HEALTH IGF::CT::IGF	\$4,370.00	\$4,370.00	2015	9/30/2015		SS10631450004	0	SMALL BUSINESS
EATON CORPORATION	IGF::OT::IGF DIAGNOSE AND REPAIR PROBLEMS AT THE N	\$4,367.00	\$4,367.00	2016	4/11/2016	SS001630025	SS001560064	0	OTHER THAN SMALL BUSINESS
PITCHER, GEORGIANN	ME EXPRESS REPORTING - MENTAL HEALTH IGF::CT::IGF	\$4,360.00	\$4,360.00	2015	9/30/2015		SS10111200063	0	SMALL BUSINESS
ADMIRAL ELEVATOR COMPANY, INC.	REMOVE WORN DAMAGED CARPET TILE AT RMB ENTRANCE #15 AND REPLACE WITH NEW CARPET TILE.	\$4,346.86	\$4,346.86	2015	7/7/2015	SS001530677	SS001060042	0	SMALL BUSINESS
PBS EMPLOYMENT CONSULTING SERVICES INC.	VE EXPRESS REPORTING IGF::CT::IGF	\$4,319.00	\$4,319.00	2015	9/30/2015		SS10251120027	0	SMALL BUSINESS
PETROVICH, JOHN	ME EXPRESS REPORTING - MENTAL HEALTH IGF::CT::IGF	\$4,314.00	\$4,314.00	2015	9/30/2015		SS10631150167	0	SMALL BUSINESS
HERMAN MILLER, INC.	GALLUP, NM X861 -INSTALLATION, TRAVEL AND REPLAC	\$4,308.08	\$4,308.08	2016	4/21/2016	SS001630323	SS001260003	0	OTHER THAN SMALL BUSINESS
MASSACHUSETTS MEDICAL SOCIETY	FOR A 1/8 PAGE DISPLAY AD PACKAGE IN THE NEW ENGLAND JOURNAL OF MEDICINE (NEJM) THAT WILL RUN 2 CONSECUTIVE WEEKS IN PRINT AND 4 WEEKS ONLINE AS A PREMIUM JOB POSTING (KEEPING AD TOWARD THE TOP OF THE SEARCH RESULT PAGES ON NEJMCAREERCENTER.ORG. ADDITIONAL EXPOSURE CONTEXTUALLY ON NEJM.ORG AND JWATCH.ORG AND 4 WEEKS ACCESS TO OUR PROFILE DATABASE) FOR DDS MEDICAL CONSULTING SERVICES.  TOTAL COST = \$4,300 CONTACT: DAVID TAVARES, DTAVARES@NEJM.ORG 860 WINTER STREET   WALTHAM, MA 02451-1413 USA OFFICE: 781.434.7417   FAX: 781.895.1045  AD COPY: INTERNAL MEDICINE, GENERAL OR FAMILY PRACTICE, PHYSICIANS, AND PSYCHOLOGISTS, INTERESTED IN PROVIDING PART-TIME OR FULL-TIME MEDICAL CONSULTANT SERVICES FOR THE SOCIAL SECURITY DISABILITY PROGRAM, UNDER CONTRACT AT A STATE DISABILITY DETERMINATION OFFICE IN HARTFORD CT, AUGUSTA ME, BOSTON MA, WORCESTER MA, CONCORD NH, PROVIDENCE RI, OR WATERBURY, VT SHOULD EMAIL A CURRENT CV TO BOS.CENTER.FOR.DISABILITY@SSA.GOV TO BEGIN THE PROCESS. THE MEDICAL CONTRACTOR MUST BE	\$4,300.00	\$4,300.00	2015	6/17/2015	SS011550001		0	OTHER THAN SMALL BUSINESS
WYOMING, DEPARTMENT OF HEALTH	IGF::OT::IGF OTHER FUNCTIONS WY RECEIPT NON-ELECTRONIC DEATH RECORDS FOR OPTION YEAR III PERIOD OF PERFORMANCE JANUARY 1, 2015 - DECEMBER 31, 2015.	\$4,300.00	\$4,300.00	2015	12/22/2014		SS001260010	0	OTHER THAN SMALL BUSINESS

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Vendor Name	Description of Requirement	Action Obligation	Base and All Options Value	Fiscal Year	Date Signed	PO/Delivery Order/Task Order/Call#	Parent Contract	Mod #	Contracting Officers Business Size Selection
HENSEL PHELPS SERVICES LLC	THE PURPOSE OF THIS REQUISITION IS FOR THE COMPLETION OF THE ANNUAL TESTING AND INSPECTION OF THE TWO (2) 50,000-GALLON UNDERGROUND STORAGE TANKS AND ASSOCIATED PIPING, SPILL BUCKETS AND THE RE-CERTIFICATION OF THE PNEUMERCATOR TMS-3000. THE COMPONENTS THAT ARE PART OF THE ANNUAL TEST AND INSPECTION ARE PART OF THE FUEL SYSTEM THAT OPERATES THE SIX (6) DIESEL GENERATORS FOR POWER EMERGENCIES AT THE NATIONAL SUPPORT CENTER IN URBANA, MD. IGF::CT::IGF	\$4,295.50	\$4,295.50	2016	6/20/2016	SS001630475	SS001461106	0	OTHER THAN SMALL BUSINESS
JOHNSON, JEFF	VE EXPRESS REPORTING IGF::CT::IGF	\$4,292.00	\$4,292.00	2015	9/30/2015	2015	SS10691170007	0	SMALL BUSINESS
EUGENE MALESKI	ME EXPRESS REPORTING - MENTAL HEALTH IGF::CT::IGF	\$4,250.00	\$4,250.00	2015	9/30/2015	2015	SS10381130056	0	SMALL BUSINESS
HOLMES, JULIE CHRISTINE	VE EXPRESS REPORTING IGF::CT::IGF	\$4,249.00	\$4,249.00	2015	9/30/2015	2015	SS10881390003	0	SMALL BUSINESS
ATAZZ TECHNICAL SERVICES, INC.	SHAREGATE LITE SOFTWARE RENEWAL	\$4,245.00	\$4,245.00	2015	6/3/2015	SS001550158		0	SMALL BUSINESS
HERMAN MILLER, INC.	GREENSBORO, NC OY20 - MEASUREMENT AND INVENTO	\$4,238.00	\$4,238.00	2016	7/27/2016	SS001630603	SS001260003	0	OTHER THAN SMALL BUSINESS
ZONES, INC.	RENEW MAINTENANCE FOR TECHSMITH SOFTWARE.	\$4,209.20	\$4,209.20	2016	4/8/2016	SS001650077		0	OTHER THAN SMALL BUSINESS
FRIEDMAN, GARY	INDEPENDENT MEDICAL REVIEWS IGF::CL::IGF	\$4,142.00	\$4,142.00	2016	4/4/2016	1	SS02164C010	0	SMALL BUSINESS
BREITENSTEIN MEDICAL ASSOCIATE, INC	VE EXPRESS REPORTING IGF::CT::IGF	\$4,130.00	\$4,130.00	2015	9/30/2015	2015	SS10881490001	0	SMALL BUSINESS
BITTINGER CORP.	MEDICAL CONTRACTOR SERVICES - PHYSICAL CASES CLOSELY ASSOCIATED TO INHERENTLY GOVERNMENTAL FUNCTION IGF::CL::IGF	\$4,100.50	\$4,100.50	2016	11/19/2015	21	SS041140038	0	SMALL BUSINESS
ROBERTA A SCHULMAN PHD	DR. SCHULMAN MODIFICATION TO ADD CASES SS00-11-40041 IGF::CT::IGF	\$4,100.00	\$4,100.00	2015	1/13/2015	6	SS001140041	0	SMALL BUSINESS
GOLDBERG, GAIL	MEDICAL CONSULTANT CONTRACTORS BLANKET PURCHASE AGREEMENT IGF::CT::IGF	\$4,100.00	\$4,100.00	2015	1/22/2015	3	SS001340032	0	SMALL BUSINESS
GREENBERG , MICHAEL K MD	MEDICAL CONSULTANT CONTRACTORS BLANKET PURCHASE AGREEMENT IGF::CT::IGF	\$4,100.00	\$4,100.00	2015	1/21/2015	6	SS001140100	0	SMALL BUSINESS
RICHARD L COHEN DR	MEDICAL CONSULTANT CONTRACTORS BLANKET PURCHASE AGREEMENT. IGF::CL::IGF	\$4,100.00	\$4,100.00	2015	1/28/2015	5	SS001140123	0	SMALL BUSINESS
HERMAN MILLER, INC.	SYSTEMS FURNITURE CONTRACT	\$4,095.31	\$4,095.31	2015	2/20/2015	SS001260003		29	OTHER THAN SMALL BUSINESS
HERMAN MILLER, INC.	LENEXA, KS #1779 - PRE-DESIGN WORK-APPROVED BY DF	\$4,059.00	\$4,059.00	2015	6/23/2015	SS001530650	SS001260003	0	OTHER THAN SMALL BUSINESS
HEALTH, TENNESSEE DEPT OF	IGF::OT::IGF OTHER FUNCTIONS TN EXERCISE OPTION YEAR 1 ENUMERATION AT BIRTH (EAB) TENNESSEE: THE CONTRACTOR SHALL PROVIDE BIRTH RECORDS FOR THE PURPOSE OF OBTAINING SOCIAL SECURITY NUMBER (SSN) AT BIRTH IN ACCORDANCE WITH THE ATTACHED STATEMENT OF WORK.	\$372,248.10	\$4,057.20	2015	5/21/2015	SS001461080		1	OTHER THAN SMALL BUSINESS
JAMES J PADDOCK	VE EXPRESS REPORTING IGF::CT::IGF	\$4,044.00	\$4,044.00	2015	9/30/2015	2015	SS10381130013	0	SMALL BUSINESS
LESLIE WILSON MD PLLC	ME EXPRESS REPORTING - MENTAL HEALTH IGF::CT::IGF	\$4,040.00	\$4,040.00	2015	9/30/2015	2015	SS10781560002	0	SMALL BUSINESS



Sole Source Contracts  
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Vendor Name	Description of Requirement	Action Obligation	Base and All Options Value	Fiscal Year	Date Signed	PO/Delivery Order/Task Order/Call#	Parent Contract	Mod #	Contracting Officers Business Size Selection
INDIANA STATE DEPARTMENT OF HEALTH	IGF::OT::IGF OTHER FUNCTIONS IN EXERCISE OPTION YEAR 1 ENUMERATION AT BIRTH (EAB) THE CONTRACTOR SHALL PROVIDE BIRTH RECORDS FOR THE PURPOSE OF OBTAINING SOCIAL SECURITY NUMBER (SSN) AT BIRTH IN ACCORDANCE WITH THE ATTACHED STATEMENT OF WORK.	\$369,936.00	\$4,032.00	2015	5/27/2015	SS001461062		1	OTHER THAN SMALL BUSINESS
MSDSPRO, LLC	IGF::CT::IGF MODIFICATION TO EXTEND SERVICES FOR 60 DAYS, INCORPORATE FAR 52.217-8 AND OBLIGATE ADDITIONAL FUNDING.	\$4,030.00	\$4,030.00	2015	4/16/2015	SS001550016		2	SMALL BUSINESS
CIRKSENA MD, WILLIAM J	ME EXPRESS REPORTING - MENTAL HEALTH IGF::CT::IGF	\$4,020.00	\$4,020.00	2015	9/30/2015	2015	SS10381330002	0	SMALL BUSINESS
JOHN C KINCAID	ME EXPRESS REPORTING - MENTAL HEALTH IGF::CT::IGF	\$4,020.00	\$4,020.00	2015	9/30/2015	2015	SS10631150274	0	SMALL BUSINESS
THOMAS S ROWE MD	ME EXPRESS REPORTING - MENTAL HEALTH IGF::CT::IGF	\$4,020.00	\$4,020.00	2015	9/30/2015	2015	SS10541140024	0	SMALL BUSINESS
HERMAN MILLER, INC.	SUPERIOR, WI #Z544 TO RE-INSTALL ONE WORKSTATION	\$4,004.00	\$4,004.00	2016	1/11/2016	SS001630138	SS001260003	0	OTHER THAN SMALL BUSINESS
WYOMING, DEPARTMENT OF HEALTH	IGF::OT::IGF OTHER FUNCTIONS WY RECEIPT NON-ELECTRONIC DEATH RECORDS FOR OPTION YEAR III PERIOD OF PERFORMANCE JANUARY 1, 2015 - DECEMBER 31, 2015.	\$3,998.46	\$3,998.46	2016	12/3/2015	4	SS001260010	1	OTHER THAN SMALL BUSINESS
UNITED STATES POSTAL SERVICE	RENEWAL OF WBD0C POST OFFICE FOR THE PERIOD OF PERFORMANCE SEPTEMBER 1, 2015 THROUGH AUGUST 31, 2016.	\$3,996.00	\$3,996.00	2015	7/20/2015	SS031550018		0	OTHER THAN SMALL BUSINESS
MCCLURE JR, HOWARD H	IGF::OT::IGF ME EXPRESS REPORTING - MENTAL HEALTH IGF::CT::IGF	\$3,980.00	\$3,980.00	2015	9/30/2015	2015	SS10781160150	0	SMALL BUSINESS
UNITED STATES POSTAL SERVICE	IGF::CL::IGF THE PURPOSE OF THIS AWARD IS TO RENEW WILKES BARRE, PA. POST OFFICE BOXES TO CONTINUE PROCESSING WBD0C WORKLOADS FOR SEPTEMBER 2016 THROUGH AUGUST 2017.								
UNITED STATES POSTAL SERVICE	THE PERIOD OF PERFORMANCE IS 09/01/2016 - 08/31/2017.	\$3,970.00	\$3,970.00	2016	8/4/2016	SS031650009		0	OTHER THAN SMALL BUSINESS
HERMAN MILLER, INC.	OLYMPIA, WA X918 -DESIGN (TO CREATE REPLACEMENT	\$3,940.00	\$3,940.00	2015	5/4/2015	SS001530462	SS001260003	0	OTHER THAN SMALL BUSINESS
KENNETH B KAUVAR MD	VE EXPRESS REPORTING IGF::CT::IGF	\$3,930.00	\$3,930.00	2015	9/30/2015	2015	SS11511180004	0	SMALL BUSINESS
TECHFIRST, INC.	IGF::CT::IGF SIGN LANGUAGE INTERPRETER SERVICES AS	\$3,912.40	\$3,912.40	2016	9/23/2016	SS001650214		1	SMALL BUSINESS
PCMG, INC.	SUBLIME TEXT EDITOR SOFTWARE FOR DCPS DEVELOPER	\$3,899.70	\$3,899.70	2015	9/23/2015	SS001550314		0	OTHER THAN SMALL BUSINESS
UNITED STATES POSTAL SERVICE	IGF::CT::IGF THE RENEWAL OF 3 PO BOXES, NEEDED FOR	\$3,896.00	\$3,896.00	2016	3/21/2016	SS051650002		0	OTHER THAN SMALL BUSINESS
JOHNSON CONSULTANTS, INC	IGF::CL::IGF REGIONAL MEDICAL CONSULTANT SERVICES - REVIEWS BY MEDICAL CONSULTANT OF DISABILITY CLAIM CASE FILES FOR AGENCY DISABILITY PROGRAM.	\$3,890.25	\$3,890.25	2016	4/21/2016	2	SS06164C013	0	SMALL BUSINESS
HARK, RICHARD D PHD	VE EXPRESS REPORTING IGF::CT::IGF	\$3,884.00	\$3,884.00	2015	9/30/2015	2015	SS10541140223	0	SMALL BUSINESS
HEALTH, WASHINGTON STATE DEPARTMENT OF	IGF::OT::IGF OTHER FUNCTIONS WA EXERCISE OPTION YEAR 1 ENUMERATION AT BIRTH (EAB) THE CONTRACTOR SHALL PROVIDE BIRTH RECORDS FOR THE PURPOSE OF OBTAINING SOCIAL SECURITY NUMBER (SSN) AT BIRTH IN ACCORDANCE WITH THE ATTACHED STATEMENT OF WORK.	\$356,063.40	\$3,880.80	2015	5/21/2015	SS001461082		1	OTHER THAN SMALL BUSINESS
FEDERAL PRISON INDUSTRIES INC	TO PURCHASE BOOKCASES AND CHAIRS FOR NEW ALI TC	\$3,856.32	\$3,856.32	2016	4/11/2016	SS061650002		0	OTHER THAN SMALL BUSINESS
SKILLTRAN LLC	THE OFFICE OF TELECOMMUNICATIONS SYSTEM OPERAT	\$3,840.00	\$3,840.00	2015	6/25/2015	SS001550177		0	SMALL BUSINESS
HERMAN MILLER, INC.	ELIZABETHTOWN, KY C449, INSTALLER HOURS AND PROI	\$3,821.84	\$3,821.84	2016	7/18/2016	SS001630555	SS001260003	0	OTHER THAN SMALL BUSINESS
HELLER, EUGENE	IGF::CL::IGF CLOSELY ASSOCIATED - CALL ORDER FOR II	\$3,800.00	\$3,800.00	2017	11/22/2016	2	SS08164C008	0	SMALL BUSINESS
THOMAS MAYEDA	IGF::CL::IGF CLOSELY ASSOCIATED-NEW CALL ORDER FO	\$3,800.00	\$3,800.00	2016	12/22/2015	1	SS08164C017	0	SMALL BUSINESS
UNITED STATES POSTAL SERVICE	IGF::OT::IGF RENEWAL OF P.O. BOXES AND CALL SERVICE	\$3,798.00	\$3,798.00	2015	3/13/2015	SS051550003		0	OTHER THAN SMALL BUSINESS
EISENBERG MD PA, IRIS	ME EXPRESS REPORTING - MENTAL HEALTH IGF::CT::IGF	\$3,780.00	\$3,780.00	2015	9/30/2015	2015	SS10541140044	0	OTHER THAN SMALL BUSINESS

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Vendor Name	Description of Requirement	Action Obligation	Base and All Options Value	Fiscal Year	Date Signed	PO/Delivery Order/Task Order/Call#	Parent Contract	Mod #	Contracting Officers Business Size Selection
NATIONAL URBAN LEAGUE, INC.	IGF::OT::IGF EXHIBIT BOOTH AT THE 2015 NATIONAL URBAN LEAGUE CONFERENCE IN FT. LAUDERDALE, FLORIDA ON JULY 29-AUGUST 1,2015 AT THE GREATER FT.LAUDERDALE/BROWARD COUNTY CONVENTION CENTER.	\$3,775.00	\$3,775.00	2015	7/7/2015	SS001550190		0	OTHER THAN SMALL BUSINESS
ARCEGA, NATHANIEL DR MD	IGF::CL::IGF ARCEGA, MC, REG. 10 ADDITIONAL SERVICES (NON-CASE REVIEWS)	\$3,720.80	\$3,720.80	2015	4/8/2015	1	SS10154C002	0	SMALL BUSINESS
HEALTH AND SENIOR SERVICES, MISSOURI DEPARTMENT OF	IGF::OT::IGF OTHER FUNCTIONS MO EXERCISE OPTION YEAR 1 ENUMERATION AT BIRTH (EAB) STATE OF MISSOURI SHALL PROVIDE BIRTH RECORD INFORMATION FOR THE PURPOSE OF OBTAINING SOCIAL SECURITY NUMBERS (SSNS) FOR NEWBORNS OF PARENT(S) WHO VOLUNTARILY REQUEST TO RECEIVE SSNS THROUGH THE EAB PROCESS.	\$339,878.70	\$3,704.40	2015	5/27/2015	SS001461094		1	OTHER THAN SMALL BUSINESS
RICHARD H SWEETMAN PHD	IGF::CL::IGF CLOSELY ASSOCIATED - REGIONAL MEDICA	\$3,700.00	\$3,700.00	2015	5/7/2015	10	SS081040028	2	SMALL BUSINESS
LEMERIDEL INC	IGF::CL::IGF CLOSELY ASSOCIATED - CALL ORDER FOR I	\$3,693.60	\$3,693.60	2016	9/23/2016	4	SS07164C013	0	SMALL BUSINESS
PACKER, BRENT	IGF::CL::IGF CLOSELY ASSOCIATED - CALL ORDER FOR I	\$3,693.60	\$3,693.60	2016	8/24/2016	4	SS07164C017	0	SMALL BUSINESS
THE MATHWORKS INC	RENEWAL OF MAINTENANCE FOR SS00-14-51074 FOR M	\$3,693.00	\$3,693.00	2015	3/17/2015	SS001550094		0	OTHER THAN SMALL BUSINESS
HERMAN MILLER, INC.	SAN JUAN, PR #2271 - FIELD OFFICE EXPERIENCED A SMA	\$3,678.14	\$3,678.14	2016	9/28/2016	SS001630770	SS001260003	1	OTHER THAN SMALL BUSINESS
JUSINO-BERRIOS, CARLOS M	IGF::OT::IGF PROVIDE EXPERT WITNESS TESTIMONY	\$3,638.66	\$3,638.66	2015	9/1/2015	SS021550010		0	SMALL BUSINESS
XCEL PROTECTIVE SERVICES, INC.	TASK ORDER 1 AGAINST CONTRACT SS00-16-60027 FOR ADDITIONAL PRODUCTIVE SERVICES.								
SEFF, DAVID J MD PA	SERVICE CONTRACT FUNCTION TYPE: IGF::OT::IGF	\$3,633.00	\$3,633.00	2016	7/15/2016	1	SS001660027	0	SMALL BUSINESS
MORNINGSTAR MAIN HICKORY	ME EXPRESS REPORTING - MENTAL HEALTH IGF::CT::IGF	\$3,630.00	\$3,630.00	2015	9/30/2015	2015	SS10381130082	0	SMALL BUSINESS
PACKER, BRENT	IGF::OT::IGF	\$3,626.00	\$3,626.00	2015	3/11/2015	SS041550015		0	SMALL BUSINESS
	IGF::CL::IGF CLOSELY ASSOCIATED - REGIONAL MEDICA	\$3,595.00	\$3,595.00	2016	5/23/2016	2	SS07164C017	0	SMALL BUSINESS
SHUTTERSTOCK, INC.	IGF::CL::IGF SHUTTERSTOCK SUBSCRIPTION LICENSES IMAGES, VIDEO CLIPS AND PIECES OF MUSIC ON BEHALF OF PHOTOGRAPHERS, DESIGNERS, ILLUSTRATORS, VIDEOGRAPHERS AND MUSICIANS	\$3,588.00	\$3,588.00	2016	6/29/2016	SS001650168		0	OTHER THAN SMALL BUSINESS
HERMAN MILLER, INC.	ET28 PORTLAND, OR ODAR DESIGN, INSTALL, AND TRAV	\$3,563.00	\$3,563.00	2015	5/27/2015	SS001431941	SS001260003	1	OTHER THAN SMALL BUSINESS
KARL MANDERS	ME EXPRESS REPORTING - MENTAL HEALTH IGF::CT::IGF	\$3,560.00	\$3,560.00	2015	9/30/2015	20151	SS10631150194	0	SMALL BUSINESS
WISCONSIN REHABILITATION & PSYCHOLOGICAL SERVICES	ME EXPRESS REPORTING - MENTAL HEALTH IGF::CT::IGF	\$3,546.00	\$3,546.00	2015	9/30/2015	2015	SS10631150248	0	OTHER THAN SMALL BUSINESS
ERWIN, MD, WILLIAM S.	ME EXPRESS REPORTING - MENTAL HEALTH IGF::CT::IGF	\$3,536.00	\$3,536.00	2015	9/30/2015	2015	SS10381130070	0	SMALL BUSINESS
PUBLIC HEALTH, MASSACHUSETTS DEPT OF	IGF::OT::IGF OTHER FUNCTIONS MA EXERCISE OPTION YEAR 1 ENUMERATION AT BIRTH (EAB) CONTRACT STATE OF MASSACHUSETTS SHALL PROVIDE BIRTH RECORD INFORMATION FOR THE PURPOSE OF OBTAINING SOCIAL SECURITY NUMBERS (SSNS) FOR NEWBORNS OF PARENT(S) WHO VOLUNTARILY REQUEST TO RECEIVE SSNS THROUGH THE EAB PROCESS.	\$323,694.00	\$3,528.00	2015	5/27/2015	SS001461071		1	OTHER THAN SMALL BUSINESS
SIDNEY WALTER	VE EXPRESS REPORTING IGF::CT::IGF	\$3,520.00	\$3,520.00	2015	9/30/2015	2015	SS10881190016	0	SMALL BUSINESS
DONOVAN, KEVIN PHD	IGF::CL::IGF CLOSELY ASSOCIATED - REGIONAL MEDICA	\$3,500.00	\$3,500.00	2016	1/19/2016	6	SS071440004	0	SMALL BUSINESS
MCWATTERS, JACK	IGF::CL::IGF  OMA MEDICAL CONSULTANTS. REVIEWS BY MEDICAL CONSULTANT OF DISABILITY CLAIM CASE FILES FOR AGENCY DISABILITY PROGRAM. ADDING NON-CASE SERVICES.	\$3,450.00	\$3,450.00	2016	9/2/2016	1	SS00164C066	1	SMALL BUSINESS

Sole Source Contracts  
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Vendor Name	Description of Requirement	Action Obligation	Base and All Options Value	Fiscal Year	Date Signed	PO/Delivery Order/Task Order/Call#	Parent Contract	Mod #	Contracting Officers Business Size Selection
ROBERTA A SCHULMAN PHD	IGF::CL::IGF OMA MEDICAL CONSULTANTS. REVIEWS BY MEDICAL CONSULTANT OF DISABILITY CLAIM CASE FILES FOR AGENCY DISABILITY PROGRAM. ADDING NON-CASE SERVICES	\$3,450.00	\$3,450.00	2016	8/11/2016	1	SS00164C041	1	SMALL BUSINESS
RANDALL, HARRY G	OMA MEDICAL CONSULTANTS. REVIEWS BY MEDICAL CONSULTANT OF DISABILITY CLAIM CASE FILES FOR AGENCY DISABILITY PROGRAM. ADDING NON-CASE SERVICES. IGF::CL::IGF	\$3,450.00	\$3,450.00	2016	9/13/2016	1	SS00164C037	1	SMALL BUSINESS
BLUEMEL, ENOLA DAVIS	VE EXPRESS REPORTING IGF::CT::IGF	\$3,446.00	\$3,446.00	2015	9/30/2015	2015	SS10541440049	0	SMALL BUSINESS
FUTURENET SECURITY SOLUTIONS, LLC	IGF::CT::IGF THE SECOND SUPPORT CENTER IS A CRITICAL FACILITY SECURITY LEVEL 4 FEDERAL SSA BUILDING. DURING RECENT QUARTERLY PREVENTATIVE MAINTENANCE (PM) ACTIVITY, OUR CONTRACT SERVICE PROVIDER DISCOVERED MULTIPLE DEFECTS THAT NEED TO BE RECTIFIED ON CRITICAL VEHICLE BARRIERS THAT ARE USED TO KEEP OUT PEOPLE WITH MALICIOUS INTENT. IT IS IMPERATIVE THAT OUR VEHICLE BARRIERS ARE KEPT IN GOOD WORKING ORDER AT ALL TIMES TO KEEP OUT VEHICLE BORNE IMPROVISED EXPLOSIVE DEVICES.	\$3,443.00	\$3,443.00	2016	1/5/2016	SS001650053		0	OTHER THAN SMALL BUSINESS
SHI INTERNATIONAL CORP.	SOCIAL SECURITY ADMINISTRATION'S OFFICE OF THE INS	\$3,442.50	\$3,442.50	2015	6/30/2015	SS001550182		0	OTHER THAN SMALL BUSINESS
HEALTH AND SOCIAL SERVICES, ALASKA DEPARTMENT OF	IGF::OT::IGF OTHER FUNCTIONS ALASKA NON-ELECTRONIC DEATH RECORDS (EDR) FOR OPTION YEAR III, RECEIPT OF 4000 DEATH RECORDS, PERIOD OF PERFORMANCE JANUARY 1, 2015 - DECEMBER 31, 2015.	\$3,440.00	\$3,440.00	2015	12/22/2014	4	SS001260013	0	OTHER THAN SMALL BUSINESS
NEUROTERAPY CENTER OF PLANO INC	IGF::CL::IGF REGION 6 MEDICAL CONSULTANTS. REVIEWS BY MEDICAL CONSULTANT OF DISABILITY CLAIM CASE FILES FOR AGENCY DISABILITY PROGRAM.	\$3,424.00	\$3,424.00	2015	4/23/2015	13	SS061140027	0	SMALL BUSINESS
EYE PHYSICIANS AND SURGEONS LTD	ME EXPRESS REPORTING - MENTAL HEALTH IGF::CT::IGF	\$3,410.00	\$3,410.00	2015	9/30/2015	2015	SS10381130058	0	OTHER THAN SMALL BUSINESS
VOELPEL, MARYJO DO	ME EXPRESS REPORTING - MENTAL HEALTH IGF::CT::IGF	\$3,410.00	\$3,410.00	2015	9/30/2015	2015	SS10631150118	0	SMALL BUSINESS
HEALTHCARE INFORMATION AND MANAGEMENT SYSTEMS SOCIETY	IGF::OT::IGF HEALTHCARE INFORMATION MANAGEMENT SYSTEMS SOCIETY (HIMMS) MEMBERSHIP AND SUBSCRIPTION RENEWAL.	\$3,375.00	\$3,375.00	2016	6/3/2016	SS001650099		0	OTHER THAN SMALL BUSINESS
COSGROVE, COLEMAN K	VE EXPRESS REPORTING IGF::CT::IGF	\$3,368.65	\$3,368.65	2015	9/30/2015	2015	SS10541140717	0	SMALL BUSINESS
DEPARTMENT OF HEALTH MINNESOTA	IGF::OT::IGF OTHER FUNCTIONS MN EXERCISE OPTION YEAR 1 ENUMERATION AT BIRTH (EAB) THE CONTRACTOR SHALL PROVIDE BIRTH RECORDS FOR THE PURPOSE OF OBTAINING SOCIAL SECURITY NUMBER (SSN) AT BIRTH IN ACCORDANCE WITH THE ATTACHED STATEMENT OF WORK.	\$303,464.96	\$3,307.52	2015	6/2/2015	SS001461068		1	OTHER THAN SMALL BUSINESS
HEALTH MENTAL HYGIENE MD DEPT	IGF::OT::IGF OTHER FUNCTIONS MD EXERCISE OPTION YEAR 1 ENUMERATION AT BIRTH (EAB) CONTRACT STATE OF MARYLAND SHALL PROVIDE BIRTH RECORD INFORMATION FOR THE PURPOSE OF OBTAINING SOCIAL SECURITY NUMBERS (SSNS) FOR NEWBORNS OF PARENT(S) WHO VOLUNTARILY REQUEST TO RECEIVE SSNS THROUGH THE EAB PROCESS.	\$303,464.96	\$3,307.52	2015	5/27/2015	SS001461067		2	OTHER THAN SMALL BUSINESS
BERNANKE, HAROLD DR MD PC	ME EXPRESS REPORTING - MENTAL HEALTH IGF::CT::IGF	\$3,300.00	\$3,300.00	2015	9/30/2015	2015	SS10251120094	0	SMALL BUSINESS
LINTON JOHN PHD	ME EXPRESS REPORTING - MENTAL HEALTH IGF::CT::IGF	\$3,300.00	\$3,300.00	2015	9/30/2015	2015	SS10381130084	0	SMALL BUSINESS
RICHARDS, BRIAN	ME EXPRESS REPORTING - MENTAL HEALTH IGF::CT::IGF	\$3,288.79	\$3,288.79	2015	9/30/2015	2015	SS10381330014	0	SMALL BUSINESS

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Vendor Name	Description of Requirement	Action Obligation	Base and All Options Value	Fiscal Year	Date Signed	PO/Delivery Order/Task Order/Call#	Parent Contract	Mod #	Contracting Officers Business Size Selection
TURNER, MARCIA	MEDICAL CONSULTANT SERVICES - PHYSICAL CASES CLOSELY ASSOCIATED TO INHERENTLY GOVERNMENTAL FUNCTION IGF::CL::IGF FOR CLOSELY ASSOCIATED	\$3,280.40	\$3,280.40	2015	4/28/2015	13	SS041140046	1	SMALL BUSINESS
WORSHAM,NANCY G MD	ME EXPRESS REPORTING - MENTAL HEALTH IGF::CT::IGF	\$3,280.00	\$3,280.00	2015	9/30/2015	2015	SS11521300006	0	SMALL BUSINESS
FRIEDMAN, GARY	IGF::CL::IGF REGION 2 MEDICAL CONSULTANTS. REVIEWS BY MEDICAL CONSULTANT OF DISABILITY CLAIM CASE FILES FOR AGENCY DISABILITY PROGRAM. INCREASING CASE REVIEWS AND EXTENDING PERIOD OF PERFORMANCE.	\$3,264.80	\$3,264.80	2016	12/9/2015	8	SS021140080	1	SMALL BUSINESS
WHITMER & ASSOCIATES LLC	VE EXPRESS REPORTING IGF::CT::IGF	\$3,263.00	\$3,263.00	2015	9/30/2015	2015	SS11521100099	0	OTHER THAN SMALL BUSINESS
NATIONAL BUSINESS FURNITURE, LLC	PURCHASE FURNITURE FOR THE ADM OFFICE AT THE CO	\$3,234.15	\$3,234.15	2015	7/21/2015	SS051550008		0	OTHER THAN SMALL BUSINESS
PUBLIC HEALTH AND ENVIRONMENT, COLORADO DEPARTMENT OF	IGF::OT::IGF OTHER FUNCTIONS CO EXERCISE OPTION YEAR 1 ENUMERATION AT BIRTH (EAB) THE CONTRACTOR SHALL PROVIDE BIRTH RECORDS FOR THE PURPOSE OF OBTAINING SOCIAL SECURITY NUMBER (SSN) AT BIRTH IN ACCORDANCE WITH THE ATTACHED STATEMENT OF WORK.	\$295,372.61	\$3,219.32	2015	5/28/2015	SS001461053		1	OTHER THAN SMALL BUSINESS
BRAHMS, COHN AND LEB	ME EXPRESS REPORTING - MENTAL HEALTH IGF::CT::IGF	\$3,190.00	\$3,190.00	2015	9/30/2015	20151	SS10631150230	0	SMALL BUSINESS
ELLIOTT J GOYTIA, MD, MA	IGF::CL::IGF REGION 2 MEDICAL CONSULTANTS. REVIEWS BY MEDICAL CONSULTANT OF DISABILITY CLAIM CASE FILES FOR AGENCY DISABILITY PROGRAM. INCREASE QUANTITY OF CASE REVIEWS.	\$3,183.18	\$3,183.18	2016	2/9/2016	12	SS021140083	3	SMALL BUSINESS
HEALTH SERVICES, WISCONSIN DEPARTMENT OF	IGF::OT::IGF OTHER FUNCTIONS WI EXERCISE OPTION YEAR 1 ENUMERATION AT BIRTH (EAB) WISCONSIN: THE CONTRACTOR SHALL PROVIDE BIRTH RECORDS FOR THE PURPOSE OF OBTAINING SOCIAL SECURITY NUMBER (SSN) AT BIRTH IN ACCORDANCE WITH THE ATTACHED STATEMENT OF WORK.	\$291,324.60	\$3,175.20	2015	5/21/2015	SS001461084		1	OTHER THAN SMALL BUSINESS
HERMAN MILLER, INC.	STATESVILLE, NC #E341 INSTALLER HOURS, TRAVEL AND	\$3,172.26	\$3,172.26	2015	12/12/2014	SS001530157	SS001260003	0	OTHER THAN SMALL BUSINESS
HERMAN MILLER, INC.	TOMS RIVER, NJ #OA26 INSTALLER HOURS AND TRAVEL	\$3,157.43	\$3,157.43	2015	3/18/2015	SS001530323	SS001260003	0	OTHER THAN SMALL BUSINESS
FRANKEL, GERALD	ME EXPRESS REPORTING - MENTAL HEALTH IGF::CT::IGF	\$3,120.00	\$3,120.00	2015	9/30/2015	2015	SS10781460003	0	SMALL BUSINESS
ARCHIE S GOLDEN MD	MEDICAL CONSULTANT CONTRACTORS BLANKET PURCHASE AGREEMENT IGF::CT::IGF	\$3,116.00	\$3,116.00	2015	5/31/2015	6	SS001140139	2	SMALL BUSINESS
ADMIRAL ELEVATOR COMPANY, INC.	IGF::OT::IGF  TASK ORDER #45 SS00-15-30665  REMOVE AND REPLACE DAMAGED AND WORN CARPET AT RMB ENTRANCE 12.	\$3,107.95	\$3,107.95	2015	7/9/2015	SS001530665	SS001060042	0	SMALL BUSINESS
HERMAN MILLER, INC.	X163 - RIVERHEAD, NY - INSTALLATION SERVICES - REQUI	\$3,104.00	\$3,104.00	2015	4/30/2015	SS001530454	SS001260003	0	OTHER THAN SMALL BUSINESS
M. JANE YATES, PH.D., P.C.	MEDICAL CONSULTANT SERVICES - NON CASE SERVICES CLOSELY ASSOCIATED TO INHERENTLY GOVERNMENTAL FUNCTION IGF::CL::IGF FOR CLOSELY ASSOCIATED	\$3,098.28	\$3,098.28	2015	7/6/2015	18	SS041140066	0	SMALL BUSINESS
HERMAN MILLER, INC.	SANFORD, NC #VB05 - DESIGN AND INSTALLATION SERVI	\$3,087.02	\$3,087.02	2015	6/8/2015	SS001530587	SS001260003	0	OTHER THAN SMALL BUSINESS
HERMAN MILLER, INC.	SANFORD, NC #VB05 INSTALLER HOURS, TRAVEL EXPENS	\$3,087.02	\$3,087.02	2015	3/18/2015	SS001530324	SS001260003	0	OTHER THAN SMALL BUSINESS
DOCSoft, INC.	IGF::OT::IGF  RENEWAL OF MAINTENANCE AND SUPPORT FOR DOCSoft AV APPLIANCE HW/SW.	\$3,082.95	\$3,082.95	2015	8/4/2015	SS001550222		0	SMALL BUSINESS

Sole Source Contracts  
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Vendor Name	Description of Requirement	Action Obligation	Base and All Options Value	Fiscal Year	Date Signed	PO/Delivery Order/Task Order/Call#	Parent Contract	Mod #	Contracting Officers Business Size Selection
LEV PHD, JULIAN	IGF::CL::IGF LEV - CALL ORDER - HOURS	\$3,081.60	\$3,081.60	2015	4/22/2015		14 SS061140034	0	SMALL BUSINESS
VAN HOOSE, THOMAS A PHD	IGF::CL::IGF VAN HOOSE - CALL ORDER - HOURS	\$3,081.60	\$3,081.60	2015	5/7/2015		12 SS061140025	0	SMALL BUSINESS
GOODWILL INDUSTRIES OF THE CHESAPEAKE INCORPORATED	WEEKEND RUG CLEANING: CHILD CARE CENTER. THE CO	\$3,045.28	\$3,045.28	2016	7/28/2016	SS000860004		32	OTHER THAN SMALL BUSINESS
CONVERGINT TECHNOLOGIES LLC	IGF::CT::IGF CONVERGINT TECHNOLOGIES - CCTV BOSCH	\$3,043.13	\$3,043.13	2016	5/22/2016	SS051650005		0	OTHER THAN SMALL BUSINESS
PITNEY BOWES INC.	EXERCISE OPTION PERIOD IV UNDER CONTRACT NO. SS0	\$3,040.00	\$3,040.00	2015	3/11/2015	SS001060050		12	OTHER THAN SMALL BUSINESS
HELLER, EUGENE	IGF::CL::IGF CLOSELY ASSOCIATED NEW CALL ORDER FOR	\$3,040.00	\$3,040.00	2016	12/21/2015		1 SS08164C008	0	SMALL BUSINESS
	INDEPENDENT CASE REVIEWS DR. RICHARD SWEETMAN (AUDIOLOGIST) REGION 8								
RICHARD H SWEETMAN PHD	IGF::CL::IGF	\$3,040.00	\$3,040.00	2016	2/10/2016		1 SS08164C023	1	SMALL BUSINESS
ALEXANDER III MD, HADDON C	ME EXPRESS REPORTING - MENTAL HEALTH IGF::CT::IGF	\$3,040.00	\$3,040.00	2015	9/30/2015		20151 SS10381130024	0	SMALL BUSINESS
MEDNICK ASSOCIATES LLC	ME EXPRESS REPORTING - MENTAL HEALTH IGF::CT::IGF	\$3,040.00	\$3,040.00	2015	9/30/2015		20154 SS11501310006	0	SMALL BUSINESS
HEALTH MENTAL HYGIENE MD DEPT	IGF::OT::IGF OTHER FUNCTIONS MD MD MODIFICATION TO ADD ADDITIONS FUNDS OF \$2,999.68 FOR 3,488 ADDITIONAL DEATH RECORDS.	\$2,999.68	\$2,999.68	2016	5/31/2016		4 SS001260061	1	OTHER THAN SMALL BUSINESS
DEPARTMENT OF HEALTH MINNESOTA	IGF::CL::IGF CLOSELY ASSOCIATED ADDING ADDITINAL FUNDS FOR ELECTRONIC DEATH REGISTRATION (EDR)FOR MINNESOTA STATE	\$2,997.96	\$2,997.96	2015	6/24/2015		3 SS001260024	2	OTHER THAN SMALL BUSINESS
HERMAN MILLER, INC.	SYSTEMS FURNITURE CONTRACT	\$2,988.00	\$2,988.00	2015	6/9/2015	SS001260003		31	OTHER THAN SMALL BUSINESS
CREATIVE REHABILITATION MANAGEMENT INC	VE EXPRESS REPORTING IGF::CT::IGF	\$2,967.00	\$2,967.00	2015	9/30/2015		20151 SS10631150331	0	SMALL BUSINESS
S ANDERSEN PROF LLC	VE EXPRESS REPORTING IGF::CT::IGF	\$2,960.00	\$2,960.00	2015	9/30/2015		2015 SS10881190164	0	SMALL BUSINESS
	IGF::OT::IGF PROVIDE INTERNET SERVICE FOR VSD AT THE COUNCIL ON AGING IN HARWICH, MA.	\$1,577.80	\$2,956.60	2016	7/13/2016	SS011650007			0 OTHER THAN SMALL BUSINESS
COMCAST OF MASSACHUSETTS I, INC.	VE EXPRESS REPORTING IGF::CT::IGF	\$2,900.00	\$2,900.00	2015	9/30/2015		2015 SS10541140441	0	SMALL BUSINESS
VOCATIONAL REHABILITATION SERVICES INC									
FANCHER, IRIS MD	IGF::CL::IGF MEDICAL CONSULTANT SERVICES - INITIAL O	\$2,899.00	\$2,899.00	2016	3/3/2016		1 SS04164C015	0	SMALL BUSINESS
RAVIZEE, ISAAC C JR MD	IGF::CL::IGF MEDICAL CONSULTANT SERVICES - INITIAL O	\$2,899.00	\$2,899.00	2016	3/3/2016		1 SS04164C016	0	SMALL BUSINESS
LOCUM, INC.	REQUEST FOR CALL ORDER FOR MEDSTAFF FOR PATEL IGF::CL::IGF	\$2,899.00	\$2,899.00	2016	3/21/2016		1 SS04164C058	0	SMALL BUSINESS
VINOD SHAH	REQUEST FOR CALL ORDER FOR ORIENTATION FOR V SHAH FOR 40 HOURS OF ORIENTATION IGF::CL::IGF	\$2,899.00	\$2,899.00	2016	3/21/2016		1 SS04164C055	0	SMALL BUSINESS
ROBERT T TENNY MD	ME EXPRESS REPORTING - MENTAL HEALTH IGF::CT::IGF	\$2,890.00	\$2,890.00	2015	9/30/2015		2015 SS10691370002	0	SMALL BUSINESS
HOSTETLER, GUY	VE EXPRESS REPORTING IGF::CT::IGF	\$2,885.00	\$2,885.00	2015	9/30/2015		2015 SS10631150411	0	SMALL BUSINESS
SEBA PROFESSIONAL SERVICES LLC	IGF::CL::IGF CLOSELY ASSOCIATED - CALL ORDER FOR II	\$2,876.00	\$2,876.00	2016	8/1/2016		1 SS07164C022	0	SMALL BUSINESS
SEBA PROFESSIONAL SERVICES LLC	IGF::CL::IGF CLOSELY ASSOCIATED - CALL ORDER FOR II	\$2,876.00	\$2,876.00	2016	9/30/2016		1 SS07164C022	1	SMALL BUSINESS
PACKER, BRENT	IGF::CL::IGF CLOSELY ASSOCIATED - REGIONAL MEDICA	\$2,876.00	\$2,876.00	2016	5/11/2016		1 SS07164C017	0	SMALL BUSINESS
	IGF::OT::IGF OTHER FUNCTIONS AL EXERCISE OPTION YEAR 1 ENUMERATION AT BIRTH (EAB) THE CONTRACTOR SHALL PROVIDE BIRTH RECORDS FOR THE PURPOSE OF OBTAINING SOCIAL SECURITY NUMBER (SSN) AT BIRTH IN ACCORDANCE WITH THE ATTACHED STATEMENT OF WORK.	\$263,003.21	\$2,866.52	2015	5/19/2015	SS001461036		1	OTHER THAN SMALL BUSINESS
PUBLIC HEALTH, ALABAMA DEPARTMENT OF									
GRODAN, PAUL J MD, A PROFESSIONAL CORPORATION	ME EXPRESS REPORTING - MENTAL HEALTH IGF::CT::IGF	\$2,820.00	\$2,820.00	2015	9/30/2015		2015 SS10881190046	0	SMALL BUSINESS
BERGMANN-HARMS, ELIZABETH	IGF::CL::IGF CLOSELY ASSOCIATED - REGIONAL MEDICA	\$2,800.00	\$2,800.00	2016	5/11/2016		1 SS07164C002	0	SMALL BUSINESS
DSOFT TECHNOLOGY COMPANY	RENEWAL OF SS00-15-50135 FOR MAINTENANCE ON UM	\$2,800.00	\$2,800.00	2016	5/3/2016	SS001650117		0	SMALL BUSINESS
BENTHAM ENTERPRISES LLC	ME EXPRESS REPORTING - MENTAL HEALTH IGF::CT::IGF	\$2,799.76	\$2,799.76	2015	9/30/2015		20151 SS10781360002	0	SMALL BUSINESS
CARLOS L LOPEZ & ASSOCIATES	VE EXPRESS REPORTING IGF::CT::IGF	\$2,781.00	\$2,781.00	2015	9/30/2015		2015 SS10781160325	0	SMALL BUSINESS
BORNSTEIN, HAROLD D JR MD	ME EXPRESS REPORTING - MENTAL HEALTH IGF::CT::IGF	\$2,740.00	\$2,740.00	2015	9/30/2015		2015 SS11501110082	0	SMALL BUSINESS

Sole Source Contracts  
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Vendor Name	Description of Requirement	Action Obligation	Base and All Options Value	Fiscal Year	Date Signed	PO/Delivery Order/Task Order/Call#	Parent Contract	Mod #	Contracting Officers Business Size Selection
CHFS-DEPARTMENT FOR COMMUNITY BASED SERVICES	IGF::OT::IGF OTHER FUNCTIONS KY EXERCISE OPTION YEAR 1 ENUMERATION AT BIRTH (EAB) THE CONTRACTOR SHALL PROVIDE BIRTH RECORDS FOR THE PURPOSE OF OBTAINING SOCIAL SECURITY NUMBER (SSN) AT BIRTH IN ACCORDANCE WITH THE ATTACHED STATEMENT OF WORK.	\$250,862.85	\$2,734.20	2015	5/27/2015	SS001461065		2	OTHER THAN SMALL BUSINESS
HEALTH AND HOSPITALS, LOUISIANA DEPARTMENT OF	IGF::OT::IGF OTHER FUNCTIONS LA EXERCISE OPTION YEAR 1 ENUMERATION AT BIRTH (EAB) THE CONTRACTOR SHALL PROVIDE BIRTH RECORDS FOR THE PURPOSE OF OBTAINING SOCIAL SECURITY NUMBER (SSN) AT BIRTH IN ACCORDANCE WITH THE ATTACHED STATEMENT OF WORK.	\$250,862.85	\$2,734.20	2015	5/27/2015	SS001461047		1	OTHER THAN SMALL BUSINESS
EXECUTIVE OFFICE OF THE COMMONWEALTH OF PUERTO RICO SALLY CLAYTON	IGF::OT::IGF OTHER FUNCTIONS PR EXERCISE OPTION YEAR 1 ENUMERATION AT BIRTH (EAB) CONTRACT COMMONWEALTH OF PUERTO RICO SHALL PROVIDE BIRTH RECORD INFORMATION FOR THE PURPOSE OF OBTAINING SOCIAL SECURITY NUMBERS (SSNS) FOR NEWBORNS OF PARENT(S) WHO VOLUNTARILY REQUEST TO RECEIVE SSNS THROUGH THE EAB PROCESS. VE EXPRESS REPORTING IGF::CT::IGF	\$250,862.85 \$2,720.00	\$2,734.20 \$2,720.00	2015 2015	5/26/2015 9/30/2015	SS001461089 2015	SS11521100060	1 0	OTHER THAN SMALL BUSINESS SMALL BUSINESS
COMPUTER LANGUAGE CO INC, THE DORA D LOGUE MD	IGF::CT::IGF TO PURCHASE THE COMPUTER DESKTOP ENCYCLOPEDIA	\$2,700.00	\$2,700.00	2016	8/19/2016	SS001650216		0	SMALL BUSINESS
FULFORD, PAUL F PHD	ME EXPRESS REPORTING - MENTAL HEALTH IGF::CT::IGF	\$2,700.00	\$2,700.00	2015	9/30/2015	2015	SS10381130118	0	SMALL BUSINESS
EFFECTIVE REHABILITATION MANAGEMENT INC	ME EXPRESS REPORTING - MENTAL HEALTH IGF::CT::IGF	\$2,690.00	\$2,690.00	2015	9/30/2015	2015	SS10251120068	0	SMALL BUSINESS
	ME EXPRESS REPORTING - MENTAL HEALTH IGF::CT::IGF	\$2,649.06	\$2,649.06	2015	9/30/2015	2015	SS10631150311	0	SMALL BUSINESS
HEALTH AND ENVIRONMENTAL CONTROL, SOUTH CAROLINA DEPARTMENT OF PEAK PERFORMANCE OF CAMBRIDGE LTD	IGF::OT::IGF OTHER FUNCTIONS SC EXERCISE OPTION YEAR 1 ENUMERATION AT BIRTH (EAB) THE CONTRACTOR SHALL PROVIDE BIRTH RECORDS FOR THE PURPOSE OF OBTAINING SOCIAL SECURITY NUMBER (SSN) AT BIRTH IN ACCORDANCE WITH THE ATTACHED STATEMENT OF WORK. VE EXPRESS REPORTING IGF::CT::IGF	\$242,770.50 \$2,637.01	\$2,646.00 \$2,637.01	2015 2015	5/26/2015 9/30/2015	SS001461078 2015		1 0	OTHER THAN SMALL BUSINESS SMALL BUSINESS
FRANCIS, ANTHONY	ME EXPRESS REPORTING - MENTAL HEALTH IGF::CT::IGF	\$2,630.00	\$2,630.00	2015	9/30/2015	2015	SS10691170010	0	SMALL BUSINESS
STACY KOUTRAKOS, PSY.D.	IGF::CL::IGF CLOSELY ASSOCIATED REGIONAL MEDICAL	\$2,620.00	\$2,620.00	2016	2/24/2016	1	SS08164C012	0	SMALL BUSINESS
COX DAN M	IGF::CL::IGF REGIONAL MEDICAL CONSULTANT SERVICES - REVIEWS BY MEDICAL CONSULTANT OF DISABILITY CLAIM CASE FILES FOR AGENCY DISABILITY PROGRAM FOR DAN M. COX - NON-REVIEW HOURS.	\$2,593.50	\$2,593.50	2016	4/19/2016	1	SS06164C008	0	SMALL BUSINESS
SIMMONS, RICHARD E. MD INC	ME EXPRESS REPORTING - MENTAL HEALTH IGF::CT::IGF	\$2,570.00	\$2,570.00	2015	9/30/2015	2015	SS10631150278	0	OTHER THAN SMALL BUSINESS
TERRY, KIMBERLEE R	IGF::CL::IGF CLOSELY ASSOCIATED - REGIONAL MEDICA	\$2,557.20	\$2,557.20	2016	5/12/2016	3	SS08164C025	0	SMALL BUSINESS
TIME WARNER CABLE INC.	IGF::OT::IGF OTHER FUNCTIONS  TO PROVIDE CABLE SERVICE THROUGHOUT THE RO FOR EXECUTIVES TO BE ABLE TO MONITOR EMERGENCY SITUATIONS AS THEY OCCUR THROUGHOUT THE REGION.  IGF::CL,CT::IGF PRIMARILY CLOSELY, BUT ALSO CRITIAL IGF::CT,CL::IGF PRIMARILY CRITICAL, BUT ALSO CLOSELY	\$2,535.00	\$2,535.00	2015	9/30/2015	SS001550319		0	OTHER THAN SMALL BUSINESS

Sole Source Contracts  
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Vendor Name	Description of Requirement	Action Obligation	Base and All Options Value	Fiscal Year	Date Signed	PO/Delivery Order/Task Order/Call#	Parent Contract	Mod #	Contracting Officers Business Size Selection
NICHOLS, MARGARET PHD	VE EXPRESS REPORTING IGF::CT::IGF	\$2,520.00	\$2,520.00	2015	9/30/2015	2015	SS10541140086	0	SMALL BUSINESS
	IGF::OT::IGF								
FABER BURNER COMPANY	EMERGENCY WORK NEEDED TO SWITCH BOILERS OVER TO OIL DUE TO GAS LEAK IN ALTMAYER FRONT LAWN.	\$2,506.20	\$2,506.20	2016	10/23/2015	SS001650012		0	OTHER THAN SMALL BUSINESS
HERMAN MILLER, INC.	RIO PIEDRAS, PR A271 DESIGN, INSTALLATION, PRODUCT	\$2,500.00	\$2,500.00	2015	3/16/2015	SS001530068	SS001260003	1	OTHER THAN SMALL BUSINESS
	IGF::CL::IGF CLOSELY ASSOCIATED								
HEALTH, VERMONT DEPARTMENT OF	ADDING ADDITINAL FUNDS FOR ELECTRONIC DEATH REGISTRATION (EDR)FOR VERMONT STATE	\$2,498.30	\$2,498.30	2015	3/25/2015	3	SS001260058	1	OTHER THAN SMALL BUSINESS
WITKIE MD, SUSAN	ME EXPRESS REPORTING - MENTAL HEALTH IGF::CT::IGF	\$2,490.00	\$2,490.00	2015	9/30/2015	2015	SS11501110036	0	SMALL BUSINESS
HERMAN MILLER, INC.	LENEXA, KS I779 PHASED RECONFIGURATION FOR SYSTE	\$2,478.00	\$2,478.00	2016	1/14/2016	SS001530687	SS001260003	1	OTHER THAN SMALL BUSINESS
	IGF::OT::IGF OTHER FUNCTIONS								
DEPARTMENT OF HEALTH UTAH	UT EXERCISE OPTION YEAR 1 ENUMERATION AT BIRTH (EAB) UTAH: THE CONTRACTOR SHALL PROVIDE BIRTH RECORDS FOR THE PURPOSE OF OBTAINING SOCIAL SECURITY NUMBER (SSN) AT BIRTH IN ACCORDANCE WITH THE ATTACHED STATEMENT OF WORK.	\$226,585.80	\$2,469.60	2015	5/21/2015	SS001461081		1	OTHER THAN SMALL BUSINESS
SHWETZ, MARY H MD	IGF::CL::IGF REGION 10, MARY SHWETZ, MC ADDITION OF INDEPENDENT CASE REVIEWS	\$2,468.70	\$2,468.70	2016	1/12/2016	1	SS10154C008	1	SMALL BUSINESS
GRENFELL, JOHN E	ME EXPRESS REPORTING - MENTAL HEALTH IGF::CT::IGF	\$2,460.00	\$2,460.00	2015	9/30/2015	2015	SS10631150139	0	SMALL BUSINESS
SZ THERAPIES	IGF::CL::IGF CLOSELY ASSOCIATED - REGIONAL MEDICA	\$2,400.00	\$2,400.00	2016	3/11/2016	1	SS08164C024	0	SMALL BUSINESS
FARBER, MARK	ME EXPRESS REPORTING - MENTAL HEALTH IGF::CT::IGF	\$2,400.00	\$2,400.00	2015	9/30/2015	20151	SS10631150052	0	SMALL BUSINESS
	IGF::CL::IGF								
RALPH ROBINOWITZ PHD	ROBINOWITZ - CALL ORDER - HOURS	\$2,396.80	\$2,396.80	2015	5/7/2015	13	SS061140022	0	SMALL BUSINESS
	IGF::OT::IGF OTHER FUNCTIONS								
HEALTH DEPARTMENT, OKLAHOMA STATE	OK EXERCISE OPTION YEAR 1 ENUMERATION AT BIRTH (EAB) THE CONTRACTOR SHALL PROVIDE BIRTH RECORDS FOR THE PURPOSE OF OBTAINING SOCIAL SECURITY NUMBER (SSN) AT BIRTH IN ACCORDANCE WITH THE ATTACHED STATEMENT OF WORK.	\$218,493.45	\$2,381.40	2015	6/18/2015	SS001461076		1	OTHER THAN SMALL BUSINESS
LINA B CALDWELL, MD	ME EXPRESS REPORTING - MENTAL HEALTH IGF::CT::IGF	\$2,380.00	\$2,380.00	2015	9/30/2015	2015	SS10541140054	0	SMALL BUSINESS
TOLLISON, C DAVID	ME EXPRESS REPORTING - MENTAL HEALTH IGF::CT::IGF	\$2,370.00	\$2,370.00	2015	9/30/2015	2015	SS10541140144	0	SMALL BUSINESS
LUNIANSKI, IRWIN	ME EXPRESS REPORTING - MENTAL HEALTH IGF::CT::IGF	\$2,340.00	\$2,340.00	2015	9/30/2015	2015	SS10881190050	0	SMALL BUSINESS
	OMA MEDICAL CONSULTANTS. REVIEWS BY MEDICAL CONSULTANT OF DISABILITY CLAIM CASE FILES FOR AGENCY DISABILITY PROGRAM. ADDING NON-CASE SERVICES.								
ROBERT FRANKLIN DRAPER, JR., M.D., P.A.	IGF::CL::IGF	\$2,300.00	\$2,300.00	2016	8/29/2016	1	SS00164C060	1	SMALL BUSINESS
MARTIN CARY PHD	VE EXPRESS REPORTING IGF::CT::IGF	\$2,300.00	\$2,300.00	2015	9/30/2015	2015	SS10881190156	0	SMALL BUSINESS
	MEDICAL CONTRACTOR SERVICES - NON CASE SERVICES CLOSELY ASSOCIATED TO INHERENTLY GOVERNMENTAL FUNCTION								
LARRY V CALDWELL MD	IGF::CL::IGF	\$2,280.24	\$2,280.24	2015	7/9/2015	19	SS041040096	0	SMALL BUSINESS
RICHARD H SWEETMAN PHD	IGF::CL::IGF CLOSELY ASSOCIATED - CALL ORDER FOR IN	\$2,280.00	\$2,280.00	2017	11/1/2016	3	SS08164C023	0	SMALL BUSINESS
BRENNER, ANNE MANON MD	IGF::CL::IGF CLOSELY ASSOCIATED NEW CALL ORDER IN	\$2,280.00	\$2,280.00	2016	12/21/2015	1	SS08164C002	0	SMALL BUSINESS
	IGF::OT::IGF								
	TASK ORDER #46 SS00-15-30666								
ADMIRAL ELEVATOR COMPANY, INC.	REMOVE AND INSTALL THE CARPET TILE AT RMB ENTANCE #14	\$2,258.27	\$2,258.27	2015	7/9/2015	SS001530666	SS001060042	0	SMALL BUSINESS
COMPREHENSIVE CAREER SERVICES	VE EXPRESS REPORTING IGF::CT::IGF	\$2,255.00	\$2,255.00	2015	9/30/2015	2015	SS10881190119	0	SMALL BUSINESS
ROBERT L BOND	ME EXPRESS REPORTING - MENTAL HEALTH IGF::CT::IGF	\$2,226.00	\$2,226.00	2015	9/30/2015	2015	SS10631150135	0	SMALL BUSINESS

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Vendor Name	Description of Requirement	Action Obligation	Base and All Options Value	Fiscal Year	Date Signed	PO/Delivery Order/Task Order/Call#	Parent Contract	Mod #	Contracting Officers Business Size Selection
HUMAN SERVICES, OREGON DEPARTMENT OF	IGF::OT::IGF OTHER FUNCTIONS OR EXERCISE OPTION YEAR 1 ENUMERATION AT BIRTH (EAB) THE CONTRACTOR SHALL PROVIDE BIRTH RECORDS FOR THE PURPOSE OF OBTAINING SOCIAL SECURITY NUMBER (SSN) AT BIRTH IN ACCORDANCE WITH THE ATTACHED STATEMENT OF WORK.	\$202,308.75	\$2,205.00	2015	5/26/2015	SS001461077		1	OTHER THAN SMALL BUSINESS
DORINSON, S MALVERN MD	ME EXPRESS REPORTING - MENTAL HEALTH IGF::CT::IGF	\$2,160.00	\$2,160.00	2015	9/30/2015	2015	SS10881190158	0	SMALL BUSINESS
AUTOMATED ENVIRONMENTS, INC.	VE EXPRESS REPORTING IGF::CT::IGF	\$2,158.54	\$2,158.54	2015	9/30/2015	201512	SS10541140151	0	SMALL BUSINESS
CYRIL RAMER, M.D., INC.	ME EXPRESS REPORTING - MENTAL HEALTH IGF::CT::IGF	\$2,130.00	\$2,130.00	2015	9/30/2015	2015	SS10881190104	0	OTHER THAN SMALL BUSINESS
TIME WARNER CABLE INC.	"IGF::OT::IGF" CABLE SERVICE THROUGHOUT THE DALLA	\$2,079.72	\$2,079.72	2016	8/18/2016	SS061650005		0	OTHER THAN SMALL BUSINESS
WILLIAM H. NEVINS, M.D., P.A.	ME EXPRESS REPORTING - MENTAL HEALTH IGF::CT::IGF	\$2,060.00	\$2,060.00	2015	9/30/2015	2015	SS10781160184	0	OTHER THAN SMALL BUSINESS
MARIA GUMBINAS	MEDICAL CONSULTANT CONTRACTORS BLANKET PURCHASE AGREEMENT  IGF::CT::IGF	\$2,050.00	\$2,050.00	2015	4/3/2015	6	SS001140098	1	SMALL BUSINESS
HEALTH, MISSISSIPPI STATE DEPARTMENT OF	IGF::OT::IGF OTHER FUNCTIONS MS EXERCISE OPTION YEAR 1 ENUMERATION AT BIRTH (EAB) THE CONTRACTOR SHALL PROVIDE BIRTH RECORDS FOR THE PURPOSE OF OBTAINING SOCIAL SECURITY NUMBER (SSN) AT BIRTH IN ACCORDANCE WITH THE ATTACHED STATEMENT OF WORK.	\$186,124.05	\$2,028.60	2015	5/27/2015	SS001461069		1	OTHER THAN SMALL BUSINESS
MICHAEL D PLOTKIN MD	ME EXPRESS REPORTING - MENTAL HEALTH IGF::CT::IGF	\$2,020.00	\$2,020.00	2015	9/30/2015	2015	SS11521100018	0	SMALL BUSINESS
TAKKI, LARRY P	VE EXPRESS REPORTING IGF::CT::IGF	\$2,016.01	\$2,016.01	2015	9/30/2015	20151	SS11501110055	0	SMALL BUSINESS
JACQUELINE FARWELL	ME EXPRESS REPORTING - MENTAL HEALTH IGF::CT::IGF	\$2,010.00	\$2,010.00	2015	9/30/2015	2015	SS11521200001	0	SMALL BUSINESS
MORNINGSTAR MAIN HICKORY	IGF::OT::IGF TEMPORARY STORAGE UNITS FOR SSA HICKORY, NC	\$2,003.40	\$2,003.40	2016	1/21/2016	SS041550015		1	SMALL BUSINESS
HEALTH AND HUMAN SERVICES, MAINE DEPARTMENT OF	IGF::OT::IGF MODIFICATION TO ADD ADDITIONS FUNDS.	\$1,999.23	\$1,999.23	2016	5/31/2016	4	SS001260043	2	OTHER THAN SMALL BUSINESS
WEIN, ANNE	VE EXPRESS REPORTING IGF::CT::IGF	\$1,961.00	\$1,961.00	2015	9/30/2015	20151	SS11511580001	0	SMALL BUSINESS
LIPETZ, PSY. D, BRUCE D	IGF::CL::IGF CLOSELY ASSOCIATED - INCREASE NON-CAS	\$1,960.52	\$1,960.52	2016	9/6/2016	2	SS08164C014	3	SMALL BUSINESS
PUBLIC HEALTH, CONNECTICUT DEPARTMENT OF	IGF::OT::IGF OTHER FUNCTIONS CT EXERCISE OPTION YEAR 1 ENUMERATION AT BIRTH (EAB) THE CONTRACTOR SHALL PROVIDE BIRTH RECORDS FOR THE PURPOSE OF OBTAINING SOCIAL SECURITY NUMBER (SSN) AT BIRTH IN ACCORDANCE WITH THE ATTACHED STATEMENT OF WORK.	\$178,031.70	\$1,940.40	2015	5/28/2015	SS001461054		1	OTHER THAN SMALL BUSINESS
HEALTH AND ENVIRONMENT, KANSAS DEPARTMENT OF	IGF::OT::IGF OTHER FUNCTIONS KS EXERCISE OPTION YEAR 1 ENUMERATION AT BIRTH (EAB) THE CONTRACTOR SHALL PROVIDE BIRTH RECORDS FOR THE PURPOSE OF OBTAINING SOCIAL SECURITY NUMBER (SSN) AT BIRTH IN ACCORDANCE WITH THE ATTACHED STATEMENT OF WORK.	\$178,031.70	\$1,940.40	2015	5/27/2015	SS001461064		1	OTHER THAN SMALL BUSINESS
DALLAS, BRYAN	VE EXPRESS REPORTING IGF::CT::IGF	\$1,939.00	\$1,939.00	2015	9/30/2015	2015	SS10631350019	0	SMALL BUSINESS
IBAIRA, DR GUILLERMO R	IGF::CL::IGF CLOSELY ASSOCIATED - REGIONAL MEDICA	\$1,934.40	\$1,934.40	2016	2/29/2016	1	SS07164C001	0	SMALL BUSINESS
IBAIRA, DR GUILLERMO R	IGF::CL::IGF CLOSELY ASSOCIATED - REGIONAL MEDICAL	\$1,934.40	\$1,934.40	2016	5/13/2016	4	SS07164C001	0	SMALL BUSINESS
LARRABEE, LARRY L	ME EXPRESS REPORTING - MENTAL HEALTH IGF::CT::IGF	\$1,930.00	\$1,930.00	2015	9/30/2015	2015	SS10631150154	0	SMALL BUSINESS
MOTEN-TRAVIS, ROSALYNN	ME EXPRESS REPORTING - MENTAL HEALTH IGF::CT::IGF	\$1,920.00	\$1,920.00	2015	9/30/2015	20151	SS10631350004	0	SMALL BUSINESS
HAMMONDS, T MICHAEL PHD	MEDICAL CONTRACTOR SERVICES - NON-CASES SERVICES CLOSELY ASSOCIATED TO INHERENTLY GOVERNMENTAL FUNCTION IGF::CL::IGF FOR CLOSELY ASSOCIATED	\$1,900.20	\$1,900.20	2015	2/5/2015	17	SS041140022	0	SMALL BUSINESS
RICHARD H SWEETMAN PHD	IGF::CL::IGF CLOSELY ASSOCIATED - INCREASE INDEPEN	\$1,900.00	\$1,900.00	2016	9/7/2016	1	SS08164C023	3	SMALL BUSINESS
JOHN BARTOW BLACK CONSULTING	VE EXPRESS REPORTING IGF::CT::IGF	\$1,896.02	\$1,896.02	2015	9/30/2015	20151	SS10541140337	0	SMALL BUSINESS



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FREMONT, JEFFREY PHD.	ME EXPRESS REPORTING - MENTAL HEALTH IGF::CT::IGF	\$1,890.00	\$1,890.00	2015	9/30/2015	20151	SS10381130064	0	SMALL BUSINESS
LEONG MD PA, DOROTHY A.	ME EXPRESS REPORTING - MENTAL HEALTH IGF::CT::IGF	\$1,880.00	\$1,880.00	2015	9/30/2015	2015	SS10781160114	0	SMALL BUSINESS
ARKANSAS DEPARTMENT OF HEALTH	IGF::OT::IGF OTHER FUNCTIONS AR EXERCISE OPTION YEAR 1 ENUMERATION AT BIRTH (EAB) THE CONTRACTOR SHALL PROVIDE BIRTH RECORDS FOR THE PURPOSE OF OBTAINING SOCIAL SECURITY NUMBER (SSN) AT BIRTH IN ACCORDANCE WITH THE ATTACHED STATEMENT OF WORK.	\$169,939.35	\$1,852.20	2015	5/20/2015	SS001461050		1	OTHER THAN SMALL BUSINESS
PUBLIC HEALTH, IOWA DEPARTMENT OF	IGF::OT::IGF OTHER FUNCTIONS IA ENUMERATION AT BIRTH (EAB) IOWA: THE CONTRACTOR SHALL PROVIDE BIRTH RECORDS FOR THE PURPOSE OF OBTAINING SOCIAL SECURITY NUMBER (SSN) AT BIRTH IN ACCORDANCE WITH THE ATTACHED STATEMENT OF WORK.	\$169,939.35	\$1,852.20	2015	6/3/2015	SS001461063		1	OTHER THAN SMALL BUSINESS
LEMERIDEL INC	IGF::CL::IGF CLOSELY ASSOCIATED - ADD ADDITIONAL NO	\$1,846.80	\$1,846.80	2016	6/17/2016	2	SS07164C013	1	SMALL BUSINESS
DAVID O. HILL, PH.D., P.A.	IGF::CL::IGF CLOSELY ASSOCIATED - REGIONAL MEDICAL	\$1,846.80	\$1,846.80	2016	5/16/2016	1	SS07164C006	0	SMALL BUSINESS
LEAF, LEIF E. PHD	IGF::CL::IGF CLOSELY ASSOCIATED - CALL ORDER FOR N	\$1,842.80	\$1,842.80	2016	7/7/2016	3	SS07164C011	0	SMALL BUSINESS
UTZ, PATRICK W	ME EXPRESS REPORTING - MENTAL HEALTH IGF::CT::IGF	\$1,840.00	\$1,840.00	2015	9/30/2015	2015	SS10631150324	0	SMALL BUSINESS
BLANK, JEFF R PHD	VE EXPRESS REPORTING IGF::CT::IGF	\$1,822.00	\$1,822.00	2015	9/30/2015	2015	SS11501110063	0	SMALL BUSINESS
COUNSELING RESOURCE CENTER, INC	ME EXPRESS REPORTING - MENTAL HEALTH IGF::CT::IGF	\$1,804.00	\$1,804.00	2015	9/30/2015	20152	SS10631150295	0	OTHER THAN SMALL BUSINESS
HERMAN MILLER, INC.	SYSTEMS FURNITURE CONTRACT - TO PAY CLAIMS UNDE	\$1,785.50	\$1,785.50	2016	6/23/2016	SS001260003		36	OTHER THAN SMALL BUSINESS
MUZAK LLC	MUSIC SERVICE FOR COMPONENTS	\$1,768.68	\$1,768.68	2015	3/30/2015	SS041550018		0	SMALL BUSINESS
HEALTH AND HUMAN SERVICES, NEVADA DEPARTMENT OF	IGF::OT::IGF OTHER FUNCTIONS NV EXERCISE OPTION YEAR 1 ENUMERATION AT BIRTH (EAB) THE CONTRACTOR SHALL PROVIDE BIRTH RECORDS FOR THE PURPOSE OF OBTAINING SOCIAL SECURITY NUMBER (SSN) AT BIRTH IN ACCORDANCE WITH THE ATTACHED STATEMENT OF WORK.	\$161,847.00	\$1,764.00	2015	5/27/2015	SS001461072		1	OTHER THAN SMALL BUSINESS
LAZARUS, JAMES PHD	ME EXPRESS REPORTING - MENTAL HEALTH IGF::CT::IGF	\$1,760.00	\$1,760.00	2015	9/30/2015	2015	SS10781160056	0	SMALL BUSINESS
VORHIES JR MD, JOHN R	IGF::CL::IGF VORHIES - CALL ORDER - HOURS	\$1,712.00	\$1,712.00	2015	4/28/2015	13	SS061140026	0	SMALL BUSINESS
PETZELT, JOHN	MEDICAL CONSULTANT SERVICES - MENTAL CASES CLOSELY ASSOCIATED TO INHERENTLY GOVERNMENTAL FUNCTION IGF::CL::IGF	\$1,710.19	\$1,710.19	2015	7/6/2015	15	SS041140069	0	SMALL BUSINESS
FERLIC, DONALD C.	IGF::CL::IGF CLOSELY ASSOCIATED - NEW CALL ORDER F	\$1,704.80	\$1,704.80	2016	12/23/2015	2	SS08164C005	0	SMALL BUSINESS
EDITOR SOFTWARE (U K) LTD	EDITOR STYLEWRITER	\$1,660.00	\$1,660.00	2015	8/6/2015	SS001550210		0	OTHER THAN SMALL BUSINESS
RITA MORGAN	IGF::CL::IGF REGION 2 MEDICAL CONSULTANTS. REVIEWS BY MEDICAL CONSULTANT OF DISABILITY CLAIM CASE FILES FOR AGENCY DISABILITY PROGRAM.INCREASE CASE REVIEW QUANTITY AND EXTEND PERIOD OF PERFORMANCE.	\$1,656.80	\$1,656.80	2016	6/29/2016	1	SS02164C005	1	SMALL BUSINESS
ELLEN ROZENFELD	REGION 5 MEDICAL CONSULTANTS. REVIEWS BY MEDICAL CONSULTANT OF DISABILITY CLAIM CASE FILES FOR AGENCY DISABILITY PROGRAM. CALL ORDER FOR NON-CASE SERVICES. IGF::CL::IGF	\$1,650.24	\$1,650.24	2016	9/23/2016	3	SS05164C036	0	SMALL BUSINESS
SAI R NIMMAGADDA	REGION 5 MEDICAL CONSULTANTS. REVIEWS BY MEDICAL CONSULTANT OF DISABILITY CLAIM CASE FILES FOR AGENCY DISABILITY PROGRAM. CALL ORDER FOR NON-CASE SERVICES. IGF::CL::IGF	\$1,650.24	\$1,650.24	2016	9/23/2016	3	SS05164C020	0	SMALL BUSINESS
JA'NITTA MARBURY	VE EXPRESS REPORTING IGF::CT::IGF	\$1,644.00	\$1,644.00	2015	9/30/2015	2015	SS10631350037	0	SMALL BUSINESS
DECHERD, GEORGE	ME EXPRESS REPORTING - MENTAL HEALTH IGF::CT::IGF	\$1,640.00	\$1,640.00	2015	9/30/2015	2015	SS10781160050	0	SMALL BUSINESS
MOORE RESOURCES INC	VE EXPRESS REPORTING IGF::CT::IGF	\$1,608.00	\$1,608.00	2015	9/30/2015	2015	SS10781160033	0	SMALL BUSINESS
DR. ADAM MILLER PSYCHOLOGICAL SERVICES, P.C.	ME EXPRESS REPORTING - MENTAL HEALTH IGF::CT::IGF	\$1,570.00	\$1,570.00	2015	9/30/2015	2015	SS10251120136	0	OTHER THAN SMALL BUSINESS
JANESE, WOODROW W	ME EXPRESS REPORTING - MENTAL HEALTH IGF::CT::IGF	\$1,570.00	\$1,570.00	2015	9/30/2015	2015	SS10781160160	0	SMALL BUSINESS

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FRANCIS B BUDA MD	ME EXPRESS REPORTING - MENTAL HEALTH IGF::CT::IGF	\$1,560.00	\$1,560.00	2015	9/30/2015	2015	SS10541140060	0	SMALL BUSINESS
WHITE, JEFFREY E	ME EXPRESS REPORTING - MENTAL HEALTH IGF::CT::IGF	\$1,540.00	\$1,540.00	2015	9/30/2015	2015	SS10631550002	0	SMALL BUSINESS
PATRICIA KENT	VE EXPRESS REPORTING IGF::CT::IGF	\$1,540.00	\$1,540.00	2015	9/30/2015	2015	SS10781160287	0	SMALL BUSINESS
RICHARD H SWEETMAN PHD	IGF::CL::IGF CLOSELY ASSOCIATED - NEW CALL ORDER F	\$1,520.00	\$1,520.00	2016	12/23/2015	1	SS08164C023	0	SMALL BUSINESS
BRENNER, ANNE MANON MD	IGF::CL::IGF CLOSELY ASSOCIATED - REGIONAL MEDICAL	\$1,520.00	\$1,520.00	2016	2/18/2016	1	SS08164C002	1	SMALL BUSINESS
MARY JONES	ME EXPRESS REPORTING - MENTAL HEALTH IGF::CT::IGF	\$1,520.00	\$1,520.00	2015	9/30/2015	2015	SS10631150098	0	SMALL BUSINESS
PEARSON AND ASSOCIATES	VE EXPRESS REPORTING IGF::CT::IGF	\$1,502.87	\$1,502.87	2015	9/30/2015	20151	SS10541140511	0	SMALL BUSINESS
PUERTO RICO POLICE DEPARTMENT	IGF::CL::IGF INVESTIGATIVE SERVICES TO SUPPORT THE PUERTO RICO CDI UNIT INCREASE NUMBER OF PERSONNEL AND OVERTIME FURNISHED UNDER THE CONTRACT.	\$500.00	\$1,500.00	2016	7/11/2016	SS021360001		4	OTHER THAN SMALL BUSINESS
SECRETARY STATE, NEW HAMPSHIRE DEPT OF	IGF::OT::IGF OTHER FUNCTIONS ADDITIONAL FUNDS FOR ELECTRONIC DEATH REGISTRATION (EDR)FOR NEW HAMPSHIRE	\$1,498.98	\$1,498.98	2015	6/26/2015	3	SS001260030	1	OTHER THAN SMALL BUSINESS
ISHIDA, MARGARET C.	VE EXPRESS REPORTING IGF::CT::IGF	\$1,464.00	\$1,464.00	2015	9/30/2015	2015	SS10881490006	0	SMALL BUSINESS
DANIEL J HENNESSY LLC	IGF::CL::IGF MODIFICATION OF CALL TO ADD ADDITIONAL	\$1,449.45	\$1,449.45	2016	5/4/2016	4	SS041440003	1	SMALL BUSINESS
MYERS, DAVID A	VE EXPRESS REPORTING IGF::CT::IGF	\$1,440.00	\$1,440.00	2015	9/30/2015	2015	SS11521400001	0	SMALL BUSINESS
ROWZIE MS, HARRS N	VE EXPRESS REPORTING IGF::CT::IGF	\$1,423.61	\$1,423.61	2015	9/30/2015	20151	SS10781160319	0	SMALL BUSINESS
JENNIFER L SULLIVAN	VE EXPRESS REPORTING IGF::CT::IGF	\$1,364.00	\$1,364.00	2015	9/30/2015	20151	SS10781160107	0	SMALL BUSINESS
NATIONAL ASSOCIATION FOR PUBLIC HEALTH STATISTICS AND INFORM	IGF::OT::IGF ELECTRONIC DEATH REGISTRATION (EDR) CONTRACT WITH NATIONAL ASSOCIATION FOR PUBLIC HEALTH STATISTICS AND INFORMATION SYSTEMS (NAPHSIS) TO PROVIDE TECHNICAL ASSISTANCE TO STATE BUREAUS OF VITAL RECORDS.	\$1,344.00	\$1,344.00	2015	6/8/2015	SS001530469	SS001360047	1	OTHER THAN SMALL BUSINESS
HERMAN MILLER, INC.	ROLLA, MO (C750) DESIGN, PRODUCT, INSTALLATION, AND	\$1,337.82	\$1,337.82	2015	4/20/2015	SS001530283	SS001260003	1	OTHER THAN SMALL BUSINESS
HEALTH, NEW MEXICO DEPARTMENT OF	IGF::OT::IGF OTHER FUNCTIONS NM EXERCISE OPTION YEAR 1 ENUMERATION AT BIRTH (EAB) THE CONTRACTOR SHALL PROVIDE BIRTH RECORDS FOR THE PURPOSE OF OBTAINING SOCIAL SECURITY NUMBER (SSN) AT BIRTH IN ACCORDANCE WITH THE ATTACHED STATEMENT OF WORK.	\$121,385.25	\$1,323.00	2015	5/27/2015	SS001461073		1	OTHER THAN SMALL BUSINESS
HEALTH AND HUMAN SERVICES, NEBRASKA DEPARTMENT OF	IGF::OT::IGF OTHER FUNCTIONS NE EXERCISE OPTION YEAR 1 ENUMERATION AT BIRTH (EAB) STATE OF NEBRASKA SHALL PROVIDE BIRTH RECORD INFORMATION FOR THE PURPOSE OF OBTAINING SOCIAL SECURITY NUMBERS (SSNS) FOR NEWBORNS OF PARENT(S) WHO VOLUNTARILY REQUEST TO RECEIVE SSNS THROUGH THE EAB PROCESS.	\$121,385.25	\$1,323.00	2015	5/27/2015	SS001461098		1	OTHER THAN SMALL BUSINESS
COMCAST OF BOSTON, INC.	IGF::OT::IGF OTHER FUNCTIONS EXERCISE OPTION YR 1: COMCAST SERVICE BOSTON REGIONAL OFFICE, FLOOR 19, 21 AND 6.	\$7,600.00	\$1,320.60	2017	10/4/2016	SS011660001		1	OTHER THAN SMALL BUSINESS
MONTEGUT, FERDINAND J JR MD	ME EXPRESS REPORTING - MENTAL HEALTH IGF::CT::IGF	\$1,320.00	\$1,320.00	2015	9/30/2015	2015	SS11501110020	0	SMALL BUSINESS
PATRICK-MACKINNON, SUSANNE	ME EXPRESS REPORTING - MENTAL HEALTH IGF::CT::IGF	\$1,300.00	\$1,300.00	2015	9/30/2015	2015	SS11501410006	0	SMALL BUSINESS
RICHARD H SWEETMAN PHD	IGF::CL::IGF CLOSELY ASSOCIATED - CALL ORDER FOR N	\$1,278.60	\$1,278.60	2017	11/1/2016	4	SS08164C023	0	SMALL BUSINESS
CENTER FOR CAREER EVALUATIONS, INC.	VE EXPRESS REPORTING IGF::CT::IGF	\$1,266.00	\$1,266.00	2015	9/30/2015	2015	SS10881190161	0	SMALL BUSINESS
RAYMOND SCALETAR MD	ME EXPRESS REPORTING - MENTAL HEALTH IGF::CT::IGF	\$1,260.00	\$1,260.00	2015	9/30/2015	2015	SS10111300006	0	SMALL BUSINESS
FEDERAL PRISON INDUSTRIES INC	PURCHASE UNICOR FURNITURE AS A SOLE SOURCE VENDOR	\$1,254.09	\$1,254.09	2015	8/20/2015	SS051550010		1	OTHER THAN SMALL BUSINESS
ALLIED PUMP CORP	PURCHASE TWO ALLIED 2SA VERTICAL SUMP PUMP 1/2	\$1,235.00	\$1,235.00	2015	1/21/2015	SS001550055		1	SMALL BUSINESS
ENGLAND & CO	VE EXPRESS REPORTING IGF::CT::IGF	\$1,231.00	\$1,231.00	2015	9/30/2015	2015	SS10691170029	0	SMALL BUSINESS
FRIEDMAN, GARY	IGF::CL::IGF REGION 2 MEDICAL CONSULTANTS. REVIEWS BY MEDICAL CONSULTANT OF DISABILITY CLAIM CASE FILES FOR AGENCY DISABILITY PROGRAM. MODIFICATION TO EXTEND PERFORMNCE PERIOD AND ADD CASE REVIEWS.	\$1,206.30	\$1,206.30	2015	12/19/2014	6	SS021140080	2	SMALL BUSINESS

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Vendor Name	Description of Requirement	Action Obligation	Base and All Options Value	Fiscal Year	Date Signed	PO/Delivery Order/Task Order/Cal#	Parent Contract	Mod #	Contracting Officers Business Size Selection
JAMES M RYAN	VE EXPRESS REPORTING IGF::CT::IGF	\$1,200.30	\$1,200.30	2015	9/30/2015	20151	SS10381130127	0	SMALL BUSINESS
SHUTTERSTOCK, INC.	IGF::CL::IGF SHUTTERSTOCK SUBSCRIPTION LICENSES IMAGES, VIDEO CLIPS AND PIECES OF MUSIC ON BEHALF OF PHOTOGRAPHERS, DESIGNERS, ILLUSTRATORS, VIDEOGRAPHERS AND MUSICIANS	\$1,200.00	\$1,200.00	2016	7/14/2016	SS001650168		1	OTHER THAN SMALL BUSINESS
LEV PHD, JULIAN	ME EXPRESS REPORTING - MENTAL HEALTH IGF::CT::IGF	\$1,200.00	\$1,200.00	2015	9/30/2015	2015	SS10781360014	0	SMALL BUSINESS
UNITED STATES POSTAL SERVICE	RENEWL WBDO POST OFFICE BOXES FOR 1 YEAR FROM 7/1/2015 TO 6/30/2016- POST OFFICE BOXES CRITICAL TO WBDOC COMPONENT'S WORKLOAD. IGF::CL::IGF	\$1,196.00	\$1,196.00	2015	6/15/2015	SS031550011		1	OTHER THAN SMALL BUSINESS
JOB POINT	VE EXPRESS REPORTING IGF::CT::IGF	\$1,155.00	\$1,155.00	2015	9/30/2015	2015	SS10691170113	0	OTHER THAN SMALL BUSINESS
JULIAN R GOLDBERG MD	IGF::CL::IGF OMA MEDICAL CONSULTANTS. REVIEWS BY MEDICAL CONSULTANT OF DISABILITY CLAIM CASE FILES FOR AGENCY DISABILITY PROGRAM. ADDING ADDITIONAL HOURS.	\$1,150.00	\$1,150.00	2016	9/12/2016	1	SS00164C018	1	SMALL BUSINESS
BROWDE REHABILITATION CONSULTING, LLC	ME EXPRESS REPORTING - MENTAL HEALTH IGF::CT::IGF	\$1,135.10	\$1,135.10	2015	9/30/2015	20151	SS10631150371	0	SMALL BUSINESS
OWINGS LEWIS, LLC	VE EXPRESS REPORTING IGF::CT::IGF	\$1,132.00	\$1,132.00	2015	9/30/2015	2015	SS11521400002	0	SMALL BUSINESS
AARON SATLOFF, M.D., P.C.	ME EXPRESS REPORTING - MENTAL HEALTH IGF::CT::IGF	\$1,130.00	\$1,130.00	2015	9/30/2015	2015	SS10251120076	0	SMALL BUSINESS
FANCHER, IRIS MD	IGF::CL::IGF TRAVEL AND HOTEL STIPEND.	\$1,125.00	\$1,125.00	2016	3/10/2016	1	SS04164C015	1	SMALL BUSINESS
RAVIZEE, ISAAC C JR MD	IGF::CL::IGF TRAVEL AND HOTEL STIPEND.	\$1,125.00	\$1,125.00	2016	3/9/2016	1	SS04164C016	1	SMALL BUSINESS
DALTON, CHARLES B	IGF::CL::IGF RMC MEDICAL TRAINING FOR OFFICE OF GENERAL COUNSEL (OGC)	\$1,116.00	\$1,116.00	2016	7/11/2016	2	SS02164C009	0	SMALL BUSINESS
MEADOWDALE MEDICAL CONSULTING, PLLC	IGF::CL::IGF MERRILL, MC, REG. 10	\$1,105.00	\$1,105.00	2015	8/4/2015	3	SS10154C000	2	SMALL BUSINESS
HEALTH AND WELFARE, IDAHO DEPARTMENT OF	IGF::OT::IGF OTHER FUNCTIONS ID EXERCISE OPTION YEAR 1 ENUMERATION AT BIRTH (EAB) THE CONTRACTOR SHALL PROVIDE BIRTH RECORDS FOR THE PURPOSE OF OBTAINING SOCIAL SECURITY NUMBER (SSN) AT BIRTH IN ACCORDANCE WITH THE ATTACHED STATEMENT OF WORK.	\$101,156.21	\$1,102.52	2015	5/28/2015	SS001461060		1	OTHER THAN SMALL BUSINESS
PAUL A.C. GREENBERG, M.D.	ME EXPRESS REPORTING - MENTAL HEALTH IGF::CT::IGF	\$1,090.00	\$1,090.00	2015	9/30/2015	2015	SS10251120048	0	SMALL BUSINESS
NORTHWEST BEHAVIORAL HEALTH CLINIC, PS	VE EXPRESS REPORTING IGF::CT::IGF	\$1,090.00	\$1,090.00	2015	9/30/2015	2015	SS11521100056	0	SMALL BUSINESS
ROBERT S FINK PHD	ME EXPRESS REPORTING - MENTAL HEALTH IGF::CT::IGF	\$1,040.00	\$1,040.00	2015	9/30/2015	2015	SS10631150082	0	SMALL BUSINESS
CRAIG SWANER PHD	VE EXPRESS REPORTING IGF::CT::IGF	\$1,040.00	\$1,040.00	2015	9/30/2015	2015	SS11511180038	0	SMALL BUSINESS
HARTUNG & ASSOCIATES INC	ME EXPRESS REPORTING - MENTAL HEALTH IGF::CT::IGF	\$1,033.00	\$1,033.00	2015	9/30/2015	20151	SS10631150283	0	SMALL BUSINESS
EASTWOOD CONSULTING, INCORPORATED	VE EXPRESS REPORTING IGF::CT::IGF	\$1,014.80	\$1,014.80	2015	9/30/2015	20151	SS10631350023	0	OTHER THAN SMALL BUSINESS
HEALTH AND HUMAN RESOURCES, WEST VIRGINIA DEPARTMENT OF	IGF::OT::IGF OTHER FUNCTIONS WV EXERCISE OPTION YEAR 1 ENUMERATION AT BIRTH (EAB) THE CONTRACTOR SHALL PROVIDE BIRTH RECORDS FOR THE PURPOSE OF OBTAINING SOCIAL SECURITY NUMBER (SSN) AT BIRTH IN ACCORDANCE WITH THE ATTACHED STATEMENT OF WORK.	\$93,063.86	\$1,014.32	2015	5/21/2015	SS001461083		1	OTHER THAN SMALL BUSINESS
DEPARTMENT OF HEALTH MINNESOTA	IGF::CL::IGF CLOSELY ASSOCIATED ADDING ADDITINAL FUNDS FOR ELECTRONIC DEATH REGISTRATION (EDR)FOR MINNESOTA STATE	\$999.32	\$999.32	2015	3/12/2015	3	SS001260024	1	OTHER THAN SMALL BUSINESS
HERMAN MILLER, INC.	HARTFORD (ODAR), CT #AX68 DESIGN, PRODUCT AND IN	\$999.08	\$999.08	2015	9/16/2015	SS001530825		1	OTHER THAN SMALL BUSINESS
ALTERNATIVE CAREERS & TRANSITIONS INC	VE EXPRESS REPORTING IGF::CT::IGF	\$994.00	\$994.00	2015	9/30/2015	20152	SS10381130235	0	SMALL BUSINESS
HILDRE, JEROLD L	VE EXPRESS REPORTING IGF::CT::IGF	\$988.00	\$988.00	2015	9/30/2015	20151	SS10781160203	0	SMALL BUSINESS
RICHARDSON, RALPH E	VE EXPRESS REPORTING IGF::CT::IGF	\$960.94	\$960.94	2015	9/30/2015	20151	SS11501110043	0	SMALL BUSINESS
FRANK J INDIHAR MD	ME EXPRESS REPORTING - MENTAL HEALTH IGF::CT::IGF	\$960.00	\$960.00	2015	9/30/2015	2015	SS10631150216	0	SMALL BUSINESS
SPECTOR INVESTMENTS LIMITED PARTNERSHIP	VE EXPRESS REPORTING IGF::CT::IGF	\$960.00	\$960.00	2015	9/30/2015	2015	SS10781160024	0	SMALL BUSINESS

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EXPANCO, INC	IGF::OT::IGF OTHER FUNCTIONS FOLLOW-ON YEAR 3 SHREDDING SERVICES FOR SSA DALLAS REGIONAL OFFICE.	\$5,289.31	\$959.71	2016	1/28/2016	SS061354002			4 OTHER THAN SMALL BUSINESS
REHABILITATION TEAM ASSOCIATES INC	ME EXPRESS REPORTING - MENTAL HEALTH IGF::CT::IGF	\$957.00	\$957.00	2015	9/30/2015	20152	SS10631150171	0	SMALL BUSINESS
HERMAN MILLER, INC.	SYSTEMS FURNITURE CONTRACT	\$953.00	\$953.00	2015	6/24/2015	SS001260003		32	OTHER THAN SMALL BUSINESS
DREAM MANAGEMENT, INC.	IGF::OT::IGF EXERCISE OPTION 3	\$509,468.16	\$952.67	2015	9/21/2015	SS001260085		9	SMALL BUSINESS
EAGAR, DONNA L	VE EXPRESS REPORTING IGF::CT::IGF	\$951.00	\$951.00	2015	9/30/2015	2015	SS10781160129	0	SMALL BUSINESS
PETZELT, JOHN	MEDICAL CONSULTANT SERVICES - MENTAL CASES CLOSELY ASSOCIATED TO INHERENTLY GOVERNMENTAL FUNCTION IGF::CL::IGF	\$950.10	\$950.10	2015	5/1/2015	13	SS041140069	0	SMALL BUSINESS
BROWN, SHARON M	ME EXPRESS REPORTING - MENTAL HEALTH IGF::CT::IGF	\$950.00	\$950.00	2015	9/30/2015	2015	SS10781360023	0	OTHER THAN SMALL BUSINESS
DORSEY CONSULTING	VE EXPRESS REPORTING IGF::CT::IGF	\$938.11	\$938.11	2015	9/30/2015	20151	SS10541140297	0	SMALL BUSINESS
NEOPOST USA INC.	REPLACE WJ250G WITH 1M5000AG AT SAN JUAN DDS	\$232.32	\$929.28	2016	2/1/2016	SS001550057		2	OTHER THAN SMALL BUSINESS
LEE, CHARLES K	IGF::CL::IGF REGIONAL MEDICAL CONSULTANT SERVICES FOR THE SOCIAL SECURITY ADMINISTRATION. REVIEWS BY MEDICAL CONSULTANT OF DISABILITY CLAIM CASE FILES FOR AGENCY DISABILITY PROGRAM. SPECIALTY - CARDIOVASCULAR/THORACIC SURGERY	\$923.40	\$923.40	2016	5/12/2016	2	SS07164C012	0	SMALL BUSINESS
LEMERIDEL INC	IGF::CL::IGF CLOSELY ASSOCIATED - REGIONAL MEDICAL	\$923.40	\$923.40	2016	5/12/2016	2	SS07164C013	0	SMALL BUSINESS
JAVIER TORRES	IGF::CL::IGF CLOSELY ASSOCIATED - REGIONAL MEDICAL	\$923.40	\$923.40	2016	5/12/2016	2	SS07164C027	0	SMALL BUSINESS
MARCIA FOSTER	IGF::CL::IGF CLOSELY ASSOCIATED - REGIONAL MEDICAL	\$923.40	\$923.40	2016	5/12/2016	2	SS07164C005	0	SMALL BUSINESS
LEAF, LEIF E. PHD	IGF::CL::IGF CLOSELY ASSOCIATED - REGIONAL MEDICAL	\$921.40	\$921.40	2016	5/13/2016	2	SS07164C011	0	SMALL BUSINESS
HERMAN MILLER, INC.	MUSKOGEE, OK #Y787, INSTALLER HOURS AND PRODUCT	\$906.36	\$906.36	2016	9/14/2016	SS001630556	SS001260003	1	OTHER THAN SMALL BUSINESS
FREDERICK, JULIE	VE EXPRESS REPORTING IGF::CT::IGF	\$900.00	\$900.00	2015	9/30/2015	2015	SS11521100010	0	SMALL BUSINESS
ROGER DECKER	VE EXPRESS REPORTING IGF::CT::IGF	\$890.51	\$890.51	2015	9/30/2015	20151	SS10541140469	0	SMALL BUSINESS
HERMAN MILLER, INC.	ST. TAMMANY, LA #BD18 - DESIGN, INSTALLATION AND	\$887.64	\$887.64	2016	7/27/2016	SS001630469	SS001260003	1	OTHER THAN SMALL BUSINESS
HEALTH, HAWAII DEPARTMENT OF	IGF::OT::IGF OTHER FUNCTIONS HI EXERCISE OPTION YEAR 1 ENUMERATION AT BIRTH (EAB) THE CONTRACTOR SHALL PROVIDE BIRTH RECORDS FOR THE PURPOSE OF OBTAINING SOCIAL SECURITY NUMBER (SSN) AT BIRTH IN ACCORDANCE WITH THE ATTACHED STATEMENT OF WORK.	\$80,923.50	\$882.00	2015	5/28/2015	SS001461059		1	OTHER THAN SMALL BUSINESS
EDWARDS, REGINA	VE EXPRESS REPORTING IGF::CT::IGF	\$873.00	\$873.00	2015	9/30/2015	2015	SS105411340035	0	SMALL BUSINESS
SALVA, AMY	VE EXPRESS REPORTING IGF::CT::IGF	\$867.00	\$867.00	2015	9/30/2015	20151	SS10691170079	0	SMALL BUSINESS
BOTT, THOMAS E & ASSOCIATES INC	ME EXPRESS REPORTING - MENTAL HEALTH IGF::CT::IGF	\$857.48	\$857.48	2015	9/30/2015	20151	SS10781360013	0	SMALL BUSINESS
ALABAMA GOODWILL INDUSTRIES, INC.	IGF::CL::IGF WAREHOUSE SERVICES AT BSSC, FOLLOW-ON YEAR 1	\$164,246.76	\$852.96	2015	8/28/2015	SS041461003		1	OTHER THAN SMALL BUSINESS
PITNEY BOWES INC.	IGF::OT::IGF OBLIGATE MONEY FOR OVERTIME	\$840.00	\$840.00	2016	9/22/2016	SS001560041		2	OTHER THAN SMALL BUSINESS
WONG, DIANA	VE EXPRESS REPORTING IGF::CT::IGF	\$830.00	\$830.00	2015	9/30/2015	2015	SS10881190257	0	SMALL BUSINESS
MARTIN, HILDA KLEIN	REGION 5 MEDICAL CONSULTANTS. REVIEWS BY MEDICAL CONSULTANT OF DISABILITY CLAIM CASE FILES FOR AGENCY DISABILITY PROGRAM. CALL ORDER FOR NON-CASE SERVICES. IGF::CL::IGF	\$825.12	\$825.12	2016	9/27/2016	3	SS05164C013	0	SMALL BUSINESS
CORNETT AND ASSOCIATES	VE EXPRESS REPORTING IGF::CT::IGF	\$823.00	\$823.00	2015	9/30/2015	2015	SS10541140651	0	SMALL BUSINESS
LONG JR, JOHN M	VE EXPRESS REPORTING IGF::CT::IGF	\$823.00	\$823.00	2015	9/30/2015	20151	SS10541140383	0	SMALL BUSINESS
HERMAN MILLER, INC.	LEESBURG, FL A258 DESIGN, PRODUCT AND INSTALLATION	\$813.63	\$813.63	2016	8/25/2016	SS001630470	SS001260003	1	OTHER THAN SMALL BUSINESS
HERMAN MILLER, INC.	SAN ANGELO TX DO #X822 TO ADD 1 J-11 WORKSTATION	\$806.52	\$806.52	2016	7/27/2016	SS001630349	SS001260003	1	OTHER THAN SMALL BUSINESS
L.P. BROOKS, ED.D, PLLC	ME EXPRESS REPORTING - MENTAL HEALTH IGF::CT::IGF	\$801.00	\$801.00	2015	9/30/2015	2015	SS10631150387	0	SMALL BUSINESS
ARNOLD, CHARLES O II	IGF::CL::IGF CLOSELY ASSOCIATED - CALL ORDER FOR N	\$800.00	\$800.00	2017	11/1/2016	3	SS08164C003	0	SMALL BUSINESS

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Vendor Name	Description of Requirement	Action Obligation	Base and All Options Value	Fiscal Year	Date Signed	PO/Delivery Order/Task Order/Call#	Parent Contract	Mod #	Contracting Officers Business Size Selection
GREENBERG MD, ABBY J	ME EXPRESS REPORTING - MENTAL HEALTH IGF::CT::IGF	\$800.00	\$800.00	2015	9/30/2015	20151	SS10251120018	0	SMALL BUSINESS
NORTH PARK STOMACH CLINIC, LTD.	ME EXPRESS REPORTING - MENTAL HEALTH IGF::CT::IGF	\$800.00	\$800.00	2015	9/30/2015	20151	SS10111100049	0	SMALL BUSINESS
WENDEL, ISADORE	VE EXPRESS REPORTING IGF::CT::IGF	\$800.00	\$800.00	2015	9/30/2015	20151	SS10881190092	0	SMALL BUSINESS
WILLIAM P. SILBERBERG, LLC	ME EXPRESS REPORTING - MENTAL HEALTH IGF::CT::IGF	\$790.00	\$790.00	2015	9/30/2015	20151	SS11501110032	0	SMALL BUSINESS
MURPHY, PATRICIA J	VE EXPRESS REPORTING IGF::CT::IGF	\$787.75	\$787.75	2015	9/30/2015	20151	SS10381130185	0	SMALL BUSINESS
RTW COMPANY, THE	VE EXPRESS REPORTING IGF::CT::IGF	\$768.45	\$768.45	2015	9/30/2015	20151	SS10781160133	0	SMALL BUSINESS
RICHARD T THIO MD	MEDICAL CONSULTANT SERVICES - NON-CASE SERVICES CLOSELY ASSOCIATED TO INHERENTLY GOVERNMENTAL FUNCTION IGF::CL::IGF FOR CLOSELY ASSOCIATED	\$760.08	\$760.08	2015	7/7/2015	18	SS041140058	0	SMALL BUSINESS
GREEN, EMILY COLSON	VE EXPRESS REPORTING IGF::CT::IGF	\$724.60	\$724.60	2015	9/30/2015	20151	SS10541440035	0	SMALL BUSINESS
INDIANAPOLIS BONE & JOINT CLINIC INC	ME EXPRESS REPORTING - MENTAL HEALTH IGF::CT::IGF	\$720.00	\$720.00	2015	9/30/2015	20151	SS10631150232	0	SMALL BUSINESS
JOSEPH FERMAGLICH MD	ME EXPRESS REPORTING - MENTAL HEALTH IGF::CT::IGF	\$720.00	\$720.00	2015	9/30/2015	20151	SS10111100015	0	SMALL BUSINESS
VICTOR G ALBERIGI	VE EXPRESS REPORTING IGF::CT::IGF	\$717.75	\$717.75	2015	9/30/2015	20151	SS10251120029	0	SMALL BUSINESS
FRAIN REHABILITATION SERVICES	VE EXPRESS REPORTING IGF::CT::IGF	\$715.05	\$715.05	2015	9/30/2015	20151	SS10541140705	0	SMALL BUSINESS
SCOTT, RALPH	ME EXPRESS REPORTING - MENTAL HEALTH IGF::CT::IGF	\$710.00	\$710.00	2015	9/30/2015	20151	SS10691170034	0	SMALL BUSINESS
DISTRICT OF COLUMBIA, GOVERNMENT OF	IGF::OT::IGF OTHER FUNCTIONS DC EXERCISE OPTION YEAR 1 ENUMERATION AT BIRTH (EAB) CONTRACT DISTRICT OF COLUMBIA SHALL PROVIDE BIRTH RECORD INFORMATION FOR THE PURPOSE OF OBTAINING SOCIAL SECURITY NUMBERS (SSNS) FOR NEWBORNS OF PARENT(S) WHO VOLUNTARILY REQUEST TO RECEIVE SSNS THROUGH THE EAB PROCESS.	\$64,738.80	\$705.60	2015	5/28/2015	SS001461057		1	OTHER THAN SMALL BUSINESS
ROSE VOCATIONAL EDUCATIONAL AND TRANSITIONAL SERVICES	VE EXPRESS REPORTING IGF::CT::IGF	\$704.00	\$704.00	2015	9/30/2015	20151	SS10541440045	0	OTHER THAN SMALL BUSINESS
TIMOTHY M BOBROWSKI	ME EXPRESS REPORTING - MENTAL HEALTH IGF::CT::IGF	\$695.00	\$695.00	2015	9/30/2015	20151	SS10631150133	0	SMALL BUSINESS
GRAY, ILENE R.	VE EXPRESS REPORTING IGF::CT::IGF	\$693.02	\$693.02	2015	9/30/2015	20151	SS10781160205	0	SMALL BUSINESS
ROGER K MCNEELEY	VE EXPRESS REPORTING IGF::CT::IGF	\$690.00	\$690.00	2015	9/30/2015	20151	SS10541140467	0	SMALL BUSINESS
HERMAN MILLER, INC.	SYSTEMS FURNITURE CONTRACT - THIS MODIFICATION IS	\$688.00	\$688.00	2017	11/3/2016	SS001260003		38	OTHER THAN SMALL BUSINESS
GANNON, PAUL G	ME EXPRESS REPORTING - MENTAL HEALTH IGF::CT::IGF	\$680.00	\$680.00	2015	9/30/2015	20151	SS11511180048	0	SMALL BUSINESS
MATTHEWS, ZACHARY	ME EXPRESS REPORTING - MENTAL HEALTH IGF::CT::IGF	\$668.04	\$668.04	2015	9/30/2015	20151	SS10631150319	0	OTHER THAN SMALL BUSINESS
MAUREEN DINGES DR	MEDICAL CONSULTANT SERVICES - NON-CASE SERVICES IGF::CL::IGF	\$665.08	\$665.08	2015	7/9/2015	21	SS041140057	0	SMALL BUSINESS
FRANCIS B BUDA MD	MEDICAL CONTRACTOR SERVICES - NON-CASE SERVICES CLOSELY ASSOCIATED TO INHERENTLY GOVERNMENTAL FUNCTION IGF::CL::IGF	\$665.08	\$665.08	2015	7/9/2015	20	SS041140055	0	SMALL BUSINESS
CROSS III, GEORGE LEE MD	MEDICAL CONSULTANT SERVICES - NON-CASE SERVICES CLOSELY ASSOCIATED TO INHERENTLY GOVERNMENTAL FUNCTION IGF::CL::IGF	\$665.07	\$665.07	2015	7/7/2015	23	SS041140050	0	SMALL BUSINESS
HEALTH AND HUMAN SERVICES, MAINE DEPARTMENT OF	IGF::OT::IGF OTHER FUNCTIONS ME EXERCISE OPTION YEAR 1 ENUMERATION AT BIRTH (EAB) CONTRACTOR SHALL PROVIDE BIRTH RECORD INFORMATION FOR THE PURPOSE OF OBTAINING SOCIAL SECURITY NUMBERS (SSNS) FOR NEWBORNS OF PARENT(S) WHO VOLUNTARILY REQUEST TO RECEIVE SSNS THROUGH THE EAB PROCESS.	\$60,694.46	\$661.52	2015	5/27/2015	SS001461086		1	OTHER THAN SMALL BUSINESS

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SECRETARY STATE, NEW HAMPSHIRE DEPT OF	IGF::OT::IGF OTHER FUNCTIONS NH EXERCISE OPTION YEAR 1 ENUMERATION AT BIRTH (EAB) CONTRACT STATE OF NEW HAMPSHIRE SHALL PROVIDE BIRTH RECORD INFORMATION FOR THE PURPOSE OF OBTAINING SOCIAL SECURITY NUMBERS (SSNS) FOR NEWBORNS OF PARENT(S) WHO VOLUNTARILY REQUEST TO RECEIVE SSNS THROUGH THE EAB PROCESS.	\$60,694.46	\$661.52	2015	5/27/2015	SS001461097		1	OTHER THAN SMALL BUSINESS
ARCEGA, NATHANIEL DR MD	IGF::CL::IGF ARCEGA, MC, REG 10 INDEPENDENT CASE REVIEWS	\$651.14	\$651.14	2015	7/27/2015		2 SS10154C002	1	SMALL BUSINESS
HOLLAND PH.D, CHARLES H.	ME EXPRESS REPORTING - MENTAL HEALTH IGF::CT::IGF	\$650.00	\$650.00	2015	9/30/2015		2015 SS10381130022	0	SMALL BUSINESS
JOHN F CONDON MD	ME EXPRESS REPORTING - MENTAL HEALTH IGF::CT::IGF	\$650.00	\$650.00	2015	9/30/2015		2015 SS10631150298	0	SMALL BUSINESS
WILFRED ROUX CONSULTANTS	VE EXPRESS REPORTING IGF::CT::IGF	\$649.08	\$649.08	2015	9/30/2015		20151 SS10781460018	0	SMALL BUSINESS
SPRAGINS, JIM B	VE EXPRESS REPORTING IGF::CT::IGF	\$641.08	\$641.08	2015	9/30/2015		20151 SS10781160317	0	SMALL BUSINESS
NORRIS DOUGHERTY	ME EXPRESS REPORTING - MENTAL HEALTH IGF::CT::IGF	\$640.00	\$640.00	2015	9/30/2015		2015 SS10631150304	0	SMALL BUSINESS
ARTHUR L LEWY	VE EXPRESS REPORTING IGF::CT::IGF	\$640.00	\$640.00	2015	9/30/2015		2015 SS11521100016	0	SMALL BUSINESS
HUMM, GAYLE A	VE EXPRESS REPORTING IGF::CT::IGF	\$640.00	\$640.00	2015	9/30/2015		2015 SS11511180010	0	SMALL BUSINESS
ARTHUR L LEWY	IGF::CL::IGF LEWY, MC, REG. 10	\$638.40	\$638.40	2015	7/25/2015		1 SS10154C007	1	SMALL BUSINESS
EXPANCO, INC	IGF::OT::IGF OTHER FUNCTIONS  SHREDDING SERVICES FOR SSA DALLAS REGIONAL OFFICE.	\$4,882.44	\$636.84	2015	1/26/2015	SS061354002		3	OTHER THAN SMALL BUSINESS
ANDERSON ASSOCIATES PSYCHOLOGY & CONSULTING	VE EXPRESS REPORTING IGF::CT::IGF	\$623.40	\$623.40	2015	9/30/2015		20151 SS10381130099	0	SMALL BUSINESS
RICHARD H RIEDL, MS CRC LPC LTD	ME EXPRESS REPORTING - MENTAL HEALTH IGF::CT::IGF	\$620.24	\$620.24	2015	9/30/2015		20151 SS10631150121	0	SMALL BUSINESS
CONNIE GUILLORY	VE EXPRESS REPORTING IGF::CT::IGF	\$619.00	\$619.00	2015	9/30/2015		20151 SS10881190209	0	SMALL BUSINESS
STEPHEN P DAVIS	VE EXPRESS REPORTING IGF::CT::IGF	\$619.00	\$619.00	2015	9/30/2015		20151 SS10881190153	0	SMALL BUSINESS
EXECUTIVE OFFICE OF THE GOVERNOR OF DELAWARE	IGF::OT::IGF OTHER FUNCTIONS DE EXERCISE OPTION YEAR 1 ENUMERATION AT BIRTH (EAB) THE CONTRACTOR SHALL PROVIDE BIRTH RECORDS FOR THE PURPOSE OF OBTAINING SOCIAL SECURITY NUMBER (SSN) AT BIRTH IN ACCORDANCE WITH THE ATTACHED STATEMENT OF WORK.	\$56,646.45	\$617.40	2015	5/28/2015	SS001461055		1	OTHER THAN SMALL BUSINESS
PUBLIC HEALTH AND HUMAN SERVICES, MONTANA DEPARTMENT OF	IGF::OT::IGF OTHER FUNCTIONS MT EXERCISE OPTION YEAR 1 ENUMERATION AT BIRTH (EAB) THE CONTRACTOR SHALL PROVIDE BIRTH RECORDS FOR THE PURPOSE OF OBTAINING SOCIAL SECURITY NUMBER (SSN) AT BIRTH IN ACCORDANCE WITH THE ATTACHED STATEMENT OF WORK.	\$56,646.45	\$617.40	2015	5/27/2015	SS001461070		1	OTHER THAN SMALL BUSINESS
SOUTH DAKOTA, STATE OF	IGF::OT::IGF OTHER FUNCTIONS SD EXERCISE OPTION 1 ENUMERATION AT BIRTH (EAB) THE CONTRACTOR SHALL PROVIDE BIRTH RECORDS FOR THE PURPOSE OF OBTAINING SOCIAL SECURITY NUMBER (SSN) AT BIRTH IN ACCORDANCE WITH THE ATTACHED STATEMENT OF WORK.	\$56,646.45	\$617.40	2015	5/26/2015	SS001461079		1	OTHER THAN SMALL BUSINESS
HEALTH, RHODE ISLAND DEPARTMENT OF	IGF::OT::IGF OTHER FUNCTIONS RI EXERCISE OPTION YEAR 1 ENUMERATION AT BIRTH (EAB) CONTRACT STATE OF RHODE ISLAND SHALL PROVIDE BIRTH RECORD INFORMATION FOR THE PURPOSE OF OBTAINING SOCIAL SECURITY NUMBERS (SSNS) FOR NEWBORNS OF PARENT(S) WHO VOLUNTARILY REQUEST TO RECEIVE SSNS THROUGH THE EAB PROCESS.	\$56,646.45	\$617.40	2015	5/28/2015	SS001461090		1	OTHER THAN SMALL BUSINESS
CALDWELL REHABILITATION CONSULTING	VE EXPRESS REPORTING IGF::CT::IGF	\$616.45	\$616.45	2015	9/30/2015		20151 SS10541140617	0	SMALL BUSINESS
M. JANE YATES, PH.D., P.C.	VE EXPRESS REPORTING IGF::CT::IGF	\$580.00	\$580.00	2015	9/30/2015		2015 SS10541140084	0	SMALL BUSINESS

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Vendor Name	Description of Requirement	Action Obligation	Base and All Options Value	Fiscal Year	Date Signed	PO/Delivery Order/Task Order/Call#	Parent Contract	Mod #	Contracting Officers Business Size Selection
HERMAN MILLER, INC.	FT. SMITH, AR ODAR OFFICE #XX55 SYSTEMS FURNITURE	\$578.09	\$578.09	2016	2/9/2016	SS001630057	SS001260003	1	OTHER THAN SMALL BUSINESS
HEALTH, NORTH DAKOTA DEPARTMENT OF	IGF::OT::IGF OTHER FUNCTIONS ND EXERCISE OPTION YEAR 1 ENUMERATION AT BIRTH (EAB) THE CONTRACTOR SHALL PROVIDE BIRTH RECORDS FOR THE PURPOSE OF OBTAINING SOCIAL SECURITY NUMBER (SSN) AT BIRTH IN ACCORDANCE WITH THE ATTACHED STATEMENT OF WORK.	\$52,216.76	\$569.12	2015	6/11/2015	SS001461075		1	OTHER THAN SMALL BUSINESS
CONSTANCE A FULLILOVE PHD LTD	ME EXPRESS REPORTING - MENTAL HEALTH IGF::CT::IGF	\$560.00	\$560.00	2015	9/30/2015	2015	SS10631150114	0	SMALL BUSINESS
FRIEDMAN, MICHAEL IVAN	ME EXPRESS REPORTING - MENTAL HEALTH IGF::CT::IGF	\$560.00	\$560.00	2015	9/30/2015	2015	SS10251120134	0	SMALL BUSINESS
CARPENTER, STEPHEN D M ED	VE EXPRESS REPORTING IGF::CT::IGF	\$558.00	\$558.00	2015	9/30/2015	20151	SS10541140533	0	SMALL BUSINESS
MARCIA H SCHULMAN	VE EXPRESS REPORTING IGF::CT::IGF	\$536.00	\$536.00	2015	9/30/2015	20151	SS10541140331	0	SMALL BUSINESS
KATSELL, NELLY	VE EXPRESS REPORTING IGF::CT::IGF	\$535.00	\$535.00	2015	9/30/2015	20151	SS10881190069	0	SMALL BUSINESS
HEALTH AND SOCIAL SERVICES, ALASKA DEPARTMENT OF	IGF::OT::IGF OTHER FUNCTIONS AK EXERCISE OPTION YEAR 1. ENUMERATION AT BIRTH (EAB) THE CONTRACTOR SHALL PROVIDE BIRTH RECORDS FOR THE PURPOSE OF OBTAINING SOCIAL SECURITY NUMBER (SSN) AT BIRTH IN ACCORDANCE WITH THE ATTACHED STATEMENT OF WORK.	\$48,554.10	\$529.20	2015	5/26/2015	SS001461048		1	OTHER THAN SMALL BUSINESS
PITCHER, GEORGIANN	ME EXPRESS REPORTING - MENTAL HEALTH IGF::CT::IGF	\$520.00	\$520.00	2015	9/30/2015	2015	SS10631150166	0	SMALL BUSINESS
MARTIN, KIMBERLY	VE EXPRESS REPORTING IGF::CT::IGF	\$520.00	\$520.00	2015	9/30/2015	2015	SS11501210012	0	SMALL BUSINESS
PSYCHOLOGICAL AND TRAINING SERVICES PA	VE EXPRESS REPORTING IGF::CT::IGF	\$507.00	\$507.00	2015	9/30/2015	20151	SS10541140613	0	SMALL BUSINESS
NEWTON, JAMES R	VE EXPRESS REPORTING IGF::CT::IGF	\$506.24	\$506.24	2015	9/30/2015	20151	SS10541140641	0	SMALL BUSINESS
SCHMIDT VOCATIONAL SERVICES	VE EXPRESS REPORTING IGF::CT::IGF	\$504.00	\$504.00	2015	9/30/2015	20151	SS11511180117	0	OTHER THAN SMALL BUSINESS
CHRISTINE SPAULDING	VE EXPRESS REPORTING IGF::CT::IGF	\$497.00	\$497.00	2015	9/30/2015	20151	SS11501110049	0	SMALL BUSINESS
HEIMAN, THOMAS H	VE EXPRESS REPORTING IGF::CT::IGF	\$497.00	\$497.00	2015	9/30/2015	20151	SS10631150451	0	SMALL BUSINESS
MICHAEL L. STINSON, M.A., C.R.C., INC.	VE EXPRESS REPORTING IGF::CT::IGF	\$493.28	\$493.28	2015	9/30/2015	20152	SS10881190043	0	SMALL BUSINESS
COOKE, CHARLES L MD	ME EXPRESS REPORTING - MENTAL HEALTH IGF::CT::IGF	\$480.00	\$480.00	2015	9/30/2015	20151	SS10381130094	0	SMALL BUSINESS
JOHN R GOFF PHD	ME EXPRESS REPORTING - MENTAL HEALTH IGF::CT::IGF	\$480.00	\$480.00	2015	9/30/2015	20151	SS10541140200	0	SMALL BUSINESS
RICHARD EDELSON & ASSOCIATES, PSC	ME EXPRESS REPORTING - MENTAL HEALTH IGF::CT::IGF	\$480.00	\$480.00	2015	9/30/2015	2015	SS10541140172	0	SMALL BUSINESS
COMCAST OF MASSACHUSETTS I, INC.	IGF::OT::IGF PROVIDE INTERNET SERVICE FOR VSD AT THE COUNCIL ON AGING IN HARWICH, MA.	\$239.40	\$478.80	2016	9/28/2016	SS011650007		1	OTHER THAN SMALL BUSINESS
SCHULZ, CARL	VE EXPRESS REPORTING IGF::CT::IGF	\$475.00	\$475.00	2015	9/30/2015	20151	SS10541140499	0	SMALL BUSINESS
MAJORS, BEVERLY	VE EXPRESS REPORTING IGF::CT::IGF	\$470.40	\$470.40	2015	9/30/2015	20151	SS10781160039	0	SMALL BUSINESS
PINTI REHABILITATION MGMT	ME EXPRESS REPORTING - MENTAL HEALTH IGF::CT::IGF	\$458.00	\$458.00	2015	9/30/2015	20151	SS10631150201	0	SMALL BUSINESS
DISABILITY SERVICE PROVIDERS	ME EXPRESS REPORTING - MENTAL HEALTH IGF::CT::IGF	\$453.00	\$453.00	2015	9/30/2015	20151	SS10631150291	0	SMALL BUSINESS
LEE KNUTSON	ME EXPRESS REPORTING - MENTAL HEALTH IGF::CT::IGF	\$453.00	\$453.00	2015	9/30/2015	20151	SS10631150399	0	SMALL BUSINESS
ANDERSON, MARY D	VE EXPRESS REPORTING IGF::CT::IGF	\$453.00	\$453.00	2015	9/30/2015	20151	SS10251320015	0	SMALL BUSINESS
SCHMITT, MARILYN T	VE EXPRESS REPORTING IGF::CT::IGF	\$453.00	\$453.00	2015	9/30/2015	20151	SS10541140205	0	SMALL BUSINESS
SWEENEY, PATRICK	VE EXPRESS REPORTING IGF::CT::IGF	\$453.00	\$453.00	2015	9/30/2015	20151	SS10541140513	0	SMALL BUSINESS
CORNELIUS, MARY	VE EXPRESS REPORTING IGF::CT::IGF	\$452.78	\$452.78	2015	9/30/2015	20151	SS10541140341	0	SMALL BUSINESS
HERMAN MILLER, INC.	DESIGN, PRODUCT AND INSTALLATION SERVICES FOR PH	\$450.09	\$450.09	2015	3/18/2015	SS001530076	SS001260003	1	OTHER THAN SMALL BUSINESS
ANDRE, TOBEY	VE EXPRESS REPORTING IGF::CT::IGF	\$447.80	\$447.80	2015	9/30/2015	20151	SS10631450019	0	SMALL BUSINESS
FISHER, RICHARD	ME EXPRESS REPORTING - MENTAL HEALTH IGF::CT::IGF	\$434.85	\$434.85	2015	9/30/2015	20151	SS10631150087	0	SMALL BUSINESS
R & R REHABILITATION SERVICES LLC	VE EXPRESS REPORTING IGF::CT::IGF	\$431.25	\$431.25	2015	9/30/2015	20151	SS10781260008	0	SMALL BUSINESS
SHEILA JUSTICE	VE EXPRESS REPORTING IGF::CT::IGF	\$428.24	\$428.24	2015	9/30/2015	20151	SS10541140495	0	SMALL BUSINESS
KHURANA MD, HARPREET	IGF::CL::IGF RMC MEDICAL TRAINING FOR OFFICE OF GENERAL COUNSEL (OGC) RMC IS PROVIDING A 4.5 HOUR LECTURE TRAINING SESSIONS.	\$421.43	\$421.43	2016	6/29/2016	2	SS02164C014	0	SMALL BUSINESS
COX VIRGINIA TELCOM, L.L.C.	COX COMMUNICATION TV IGF::OT::IGF	\$420.00	\$420.00	2015	2/6/2015	SS001451233		1	OTHER THAN SMALL BUSINESS
ERIC C. PUESTOW, M.D., P.A.	ME EXPRESS REPORTING - MENTAL HEALTH IGF::CT::IGF	\$420.00	\$420.00	2015	9/30/2015	20151	SS10541140036	0	SMALL BUSINESS
HILLEL RACLAU PHD	ME EXPRESS REPORTING - MENTAL HEALTH IGF::CT::IGF	\$420.00	\$420.00	2015	9/30/2015	2015	SS10381130032	0	SMALL BUSINESS
REYNOLDS DAVID J PHD	VE EXPRESS REPORTING IGF::CT::IGF	\$420.00	\$420.00	2015	9/30/2015	2015	SS11521100032	0	SMALL BUSINESS
HUMAN SERVICES OUTCOMES, INC.	VE EXPRESS REPORTING IGF::CT::IGF	\$414.00	\$414.00	2015	9/30/2015	20151	SS10541140255	0	SMALL BUSINESS
MURGO, PAUL M	VE EXPRESS REPORTING IGF::CT::IGF	\$414.00	\$414.00	2015	9/30/2015	2015	SS11501110019	0	SMALL BUSINESS
CAREER ACTION ASSOCIATES PC	VE EXPRESS REPORTING IGF::CT::IGF	\$413.92	\$413.92	2015	9/30/2015	20151	SS10541140629	0	SMALL BUSINESS



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BEALE, ANDREW	VE EXPRESS REPORTING IGF::CT::IGF	\$402.50	\$402.50	2015	9/30/2015	20151	SS10381130175	0	SMALL BUSINESS
DANIEL W HAMILL PSYCHOLOGIST	ME EXPRESS REPORTING - MENTAL HEALTH IGF::CT::IGF	\$400.00	\$400.00	2015	9/30/2015	20151	SS10781160084	0	SMALL BUSINESS
LESSNE, DANA	VE EXPRESS REPORTING IGF::CT::IGF	\$397.93	\$397.93	2015	9/30/2015	20151	SS10541140569	0	SMALL BUSINESS
MARY JESKO AND ASSOCIATES	VE EXPRESS REPORTING IGF::CT::IGF	\$396.00	\$396.00	2015	9/30/2015	20151	SS10881190089	0	SMALL BUSINESS
JBG/BALTIMORE SSA, L.L.C.	RADIFICATION: SHOWER CURTAIN INSTALLATION WABA	\$394.02	\$394.02	2016	2/16/2016	SS001650068		0	SMALL BUSINESS
MILTON FREEDMAN MD, INTERNAL MEDICINE	ME EXPRESS REPORTING - MENTAL HEALTH IGF::CT::IGF	\$390.00	\$390.00	2015	9/30/2015	2015	SS10541140038	0	OTHER THAN SMALL BUSINESS
SNOWY RANGE CONSULTING LLC	VE EXPRESS REPORTING IGF::CT::IGF	\$390.00	\$390.00	2015	9/30/2015	2015	SS11511180030	0	SMALL BUSINESS
HEARTLAND REHAB SVCS	ME EXPRESS REPORTING - MENTAL HEALTH IGF::CT::IGF	\$383.80	\$383.80	2015	9/30/2015	2015	SS10631150307	0	SMALL BUSINESS
FALON SOURCING SOLUTIONS LLC	IGF::CT::IGF MODIFICATION TO OBLIGATE MONEY FOR 2 HOURS OF OVERTIME WORKED ON 9/01/2016	\$383.76	\$383.76	2016	9/21/2016	SS001660006		3	SMALL BUSINESS
DELMAR REHABILITATION	ME EXPRESS REPORTING - MENTAL HEALTH IGF::CT::IGF	\$376.00	\$376.00	2015	9/30/2015	20151	SS10631150079	0	SMALL BUSINESS
HERMAN MILLER, INC.	MONROE LA #B8021 - ADDITIONAL MA-01 WORKSTATIO	\$370.87	\$370.87	2015	7/15/2015	SS001530548		1	OTHER THAN SMALL BUSINESS
LAVELY, RICHARD MD JD	ME EXPRESS REPORTING - MENTAL HEALTH IGF::CT::IGF	\$370.00	\$370.00	2015	9/30/2015	2015	SS11501110004	0	SMALL BUSINESS
HALL, RICHARD B	VE EXPRESS REPORTING IGF::CT::IGF	\$370.00	\$370.00	2015	9/30/2015	20151	SS11501110029	0	SMALL BUSINESS
REMAS GROUP, THE	VE EXPRESS REPORTING IGF::CT::IGF	\$370.00	\$370.00	2015	9/30/2015	20151	SS10881190073	0	SMALL BUSINESS
BROWN, ADGER	VE EXPRESS REPORTING IGF::CT::IGF	\$368.00	\$368.00	2015	9/30/2015	20151	SS10541140193	0	SMALL BUSINESS
MCKEOWN, DOUG	VE EXPRESS REPORTING IGF::CT::IGF	\$361.90	\$361.90	2015	9/30/2015	20151	SS10541140034	0	SMALL BUSINESS
DAVID P GORMLEY MD LTD	ME EXPRESS REPORTING - MENTAL HEALTH IGF::CT::IGF	\$360.00	\$360.00	2015	9/30/2015	2015	SS10111100021	0	SMALL BUSINESS
WYOMING, DEPARTMENT OF HEALTH	IGF::OT::IGF OTHER FUNCTIONS WY EXERCISE OPTION YEAR 1 ENUMERATION AT BIRTH (EAB) THE CONTRACTOR SHALL PROVIDE BIRTH RECORDS FOR THE PURPOSE OF OBTAINING SOCIAL SECURITY NUMBER (SSN) AT BIRTH IN ACCORDANCE WITH THE ATTACHED STATEMENT OF WORK.	\$32,369.40	\$352.80	2015	5/21/2015	SS001461085		1	OTHER THAN SMALL BUSINESS
CARMEN VALLADARES	VE EXPRESS REPORTING IGF::CT::IGF	\$332.00	\$332.00	2015	9/30/2015	2015	SS10251120011	0	OTHER THAN SMALL BUSINESS
MELISSA FASS KARLIN	VE EXPRESS REPORTING IGF::CT::IGF	\$332.00	\$332.00	2015	9/30/2015	20151	SS10251120017	0	SMALL BUSINESS
BASSEM INC.	VE EXPRESS REPORTING IGF::CT::IGF	\$331.00	\$331.00	2015	9/30/2015	20151	SS10541140165	0	SMALL BUSINESS
BROADSPIRE SERVICES INC	VE EXPRESS REPORTING IGF::CT::IGF	\$331.00	\$331.00	2015	9/30/2015	20151	SS10881190183	0	OTHER THAN SMALL BUSINESS
FORD, MARGARET H	VE EXPRESS REPORTING IGF::CT::IGF	\$331.00	\$331.00	2015	9/30/2015	2015	SS10631150417	0	SMALL BUSINESS
VIDA VOCATIONAL COUNSELING CORP	VE EXPRESS REPORTING IGF::CT::IGF	\$328.12	\$328.12	2015	9/30/2015	20151	SS10541440053	0	SMALL BUSINESS
SAWYER DISABILITY MANAGMENT CONSULTING	VE EXPRESS REPORTING IGF::CT::IGF	\$326.56	\$326.56	2015	9/30/2015	20151	SS10541140145	0	SMALL BUSINESS
RAYMOND CESTAR	VE EXPRESS REPORTING IGF::CT::IGF	\$325.00	\$325.00	2015	9/30/2015	20151	SS10251120007	0	SMALL BUSINESS
JUSINO-BERRIOS, CARLOS M	IGF::OT::IGF PROVIDE EXPERT WITNESS TESTIMONY	\$322.95	\$322.95	2015	9/23/2015	SS021550010		1	SMALL BUSINESS
CHERYL M D MORROW-WHITE	ME EXPRESS REPORTING - MENTAL HEALTH IGF::CT::IGF	\$320.00	\$320.00	2015	9/30/2015	2015	SS10631150138	0	SMALL BUSINESS
JOHN C KINCAID	ME EXPRESS REPORTING - MENTAL HEALTH IGF::CT::IGF	\$320.00	\$320.00	2015	9/30/2015	20151	SS10631150274	0	SMALL BUSINESS
MARVA P DAWKINS PHD	ME EXPRESS REPORTING - MENTAL HEALTH IGF::CT::IGF	\$320.00	\$320.00	2015	9/30/2015	2015	SS10631150184	0	SMALL BUSINESS
MUNOZ, GILBERTO MD	ME EXPRESS REPORTING - MENTAL HEALTH IGF::CT::IGF	\$320.00	\$320.00	2015	9/30/2015	20151	SS10631150332	0	OTHER THAN SMALL BUSINESS
NICK A DEFILIPPIS PHD PC	ME EXPRESS REPORTING - MENTAL HEALTH IGF::CT::IGF	\$320.00	\$320.00	2015	9/30/2015	2015	SS10541140150	0	SMALL BUSINESS
SCHOSHEIM, JOHN	ME EXPRESS REPORTING - MENTAL HEALTH IGF::CT::IGF	\$320.00	\$320.00	2015	9/30/2015	20151	SS10541140062	0	SMALL BUSINESS
GARNER, SYDNEY H	ME EXPRESS REPORTING - MENTAL HEALTH IGF::CT::IGF	\$318.04	\$318.04	2015	9/30/2015	20151	SS10541140022	0	SMALL BUSINESS
MAXIM, WARREN	VE EXPRESS REPORTING IGF::CT::IGF	\$312.55	\$312.55	2015	9/30/2015	20151	SS11501110023	0	SMALL BUSINESS
KLAMM, WENDY P	VE EXPRESS REPORTING IGF::CT::IGF	\$310.70	\$310.70	2015	9/30/2015	20151	SS10781160161	0	SMALL BUSINESS
HEALTH, VERMONT DEPARTMENT OF	IGF::OT::IGF OTHER FUNCTIONS VT EXERCISE OPTION YEAR 1 ENUMERATION AT BIRTH (EAB) CONTRACT STATE OF VERMONT SHALL PROVIDE BIRTH RECORD INFORMATION FOR THE PURPOSE OF OBTAINING SOCIAL SECURITY NUMBERS (SSNS) FOR NEWBORNS OF PARENT(S) WHO VOLUNTARILY REQUEST TO RECEIVE SSNS THROUGH THE EAB PROCESS.	\$28,325.06	\$308.72	2015	5/21/2015	SS001461088		1	OTHER THAN SMALL BUSINESS
STROUD, MARILYN J	VE EXPRESS REPORTING IGF::CT::IGF	\$295.56	\$295.56	2015	9/30/2015	20151	SS10381330003	0	SMALL BUSINESS
DIAMOND MIND, LLC	VE EXPRESS REPORTING IGF::CT::IGF	\$293.18	\$293.18	2015	9/30/2015	20151	SS10781460002	0	SMALL BUSINESS
REHABILITATION & REEMPLOYMENT INC	VE EXPRESS REPORTING IGF::CT::IGF	\$292.00	\$292.00	2015	9/30/2015	20151	SS11501110075	0	SMALL BUSINESS
COHEN, RICHARD W MD PC	ME EXPRESS REPORTING - MENTAL HEALTH IGF::CT::IGF	\$290.00	\$290.00	2015	9/30/2015	20152	SS10381130026	0	SMALL BUSINESS
COUNSELING AND EDUCATIONAL SERVICES, P.A.	ME EXPRESS REPORTING - MENTAL HEALTH IGF::CT::IGF	\$290.00	\$290.00	2015	9/30/2015	2015	SS10541140168	0	SMALL BUSINESS
HEATHER HENDERSON-GALLIGAN, PH., HSPP	ME EXPRESS REPORTING - MENTAL HEALTH IGF::CT::IGF	\$290.00	\$290.00	2015	9/30/2015	2015	SS10631350012	0	OTHER THAN SMALL BUSINESS
KIDDER, WAYNE R	VE EXPRESS REPORTING IGF::CT::IGF	\$290.00	\$290.00	2015	9/30/2015	20151	SS10881490005	0	SMALL BUSINESS



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BELL, ALFREDA	ME EXPRESS REPORTING - MENTAL HEALTH IGF::CT::IGF		\$287.00	\$287.00	2015	9/30/2015	2015 SS10631150255	0	SMALL BUSINESS
MOWERY, AIMEE	ME EXPRESS REPORTING - MENTAL HEALTH IGF::CT::IGF		\$287.00	\$287.00	2015	9/30/2015	20151 SS10631150383	0	SMALL BUSINESS
DIVERSIFIED DISABILITY & VOCATIONAL SERVICES, INC.	VE EXPRESS REPORTING IGF::CT::IGF		\$287.00	\$287.00	2015	9/30/2015	20151 SS10381130153	0	SMALL BUSINESS
STAR LEADERSHIP DEVELOPMENT INC	VE EXPRESS REPORTING IGF::CT::IGF		\$287.00	\$287.00	2015	9/30/2015	20151 SS10381130055	0	SMALL BUSINESS
WILSON, CHRISTY	VE EXPRESS REPORTING IGF::CT::IGF		\$287.00	\$287.00	2015	9/30/2015	20151 SS10781160231	0	SMALL BUSINESS
MC CLAIN, TERESA A	VE EXPRESS REPORTING IGF::CT::IGF		\$286.16	\$286.16	2015	9/30/2015	20151 SS10631150031	0	SMALL BUSINESS
HEALD, MARSHA N	VE EXPRESS REPORTING IGF::CT::IGF		\$286.00	\$286.00	2015	9/30/2015	20151 SS10781160085	0	SMALL BUSINESS
REHABILITATION PSYCHOLOGY INC	ME EXPRESS REPORTING - MENTAL HEALTH IGF::CT::IGF		\$285.87	\$285.87	2015	9/30/2015	2015 SS10631150110	0	SMALL BUSINESS
SHELTON REHAB CONSULTING	VE EXPRESS REPORTING IGF::CT::IGF		\$284.34	\$284.34	2015	9/30/2015	20151 SS10631350041	0	SMALL BUSINESS
BENJAMIN CORTIJO JR MD	IGF::CL::IGF RMC MEDICAL TRAINING FOR OFFICE OF GENERAL COUNSEL (OGC) NON-CASE SER. HRS MENTORING TRAINING.		\$280.95	\$280.95	2016	7/11/2016	2 SS02164C008	0	SMALL BUSINESS
TYRA A WATTS	ME EXPRESS REPORTING - MENTAL HEALTH IGF::CT::IGF		\$275.13	\$275.13	2015	9/30/2015	20151 SS10541140225	0	SMALL BUSINESS
L.M. KING SALES, INC.	VE EXPRESS REPORTING IGF::CT::IGF		\$272.00	\$272.00	2015	9/30/2015	20151 SS10781160147	0	SMALL BUSINESS
BILLEHUS, ALLAN S	VE EXPRESS REPORTING IGF::CT::IGF		\$269.77	\$269.77	2015	9/30/2015	20151 SS105411440013	0	SMALL BUSINESS
FALON SOURCING SOLUTIONS LLC	IGF::CT::IGF MODIFICATION TO OBLIGATE MONEY FOR OVERTIME WORKED ON 9/01/2016 AT SSC		\$269.76	\$269.76	2016	9/22/2016	SS001660005	3	SMALL BUSINESS
KAY SQUIRES GILREATH, VOCATIONAL CONSULTANT, INC	VE EXPRESS REPORTING IGF::CT::IGF		\$267.00	\$267.00	2015	9/30/2015	20151 SS10781160067	0	SMALL BUSINESS
JOE WESLEY MANN	VE EXPRESS REPORTING IGF::CT::IGF		\$266.80	\$266.80	2015	9/30/2015	20151 SS10541140289	0	SMALL BUSINESS
BEHAVIOR MANAGEMENT CONSULTANTS, A PROFESSIONAL CORPORATION	VE EXPRESS REPORTING IGF::CT::IGF		\$264.00	\$264.00	2015	9/30/2015	20151 SS10541140673	0	SMALL BUSINESS
WISCONSIN RETURN TO WORK CENTER	VE EXPRESS REPORTING IGF::CT::IGF		\$264.00	\$264.00	2015	9/30/2015	20151 SS10631150023	0	SMALL BUSINESS
DORA D LOGUE MD	ME EXPRESS REPORTING - MENTAL HEALTH IGF::CT::IGF		\$260.00	\$260.00	2015	9/30/2015	20151 SS10381130118	0	SMALL BUSINESS
GUSOFF, BERNARD D MD PC	ME EXPRESS REPORTING - MENTAL HEALTH IGF::CT::IGF		\$260.00	\$260.00	2015	9/30/2015	20151 SS10251120102	0	SMALL BUSINESS
SIMMONS, RICHARD E. MD INC	ME EXPRESS REPORTING - MENTAL HEALTH IGF::CT::IGF		\$260.00	\$260.00	2015	9/30/2015	20151 SS10631150278	0	OTHER THAN SMALL BUSINESS
TAVEL, MORTON	ME EXPRESS REPORTING - MENTAL HEALTH IGF::CT::IGF		\$260.00	\$260.00	2015	9/30/2015	20151 SS10631350006	0	SMALL BUSINESS
TODD, JAMES W MD	ME EXPRESS REPORTING - MENTAL HEALTH IGF::CT::IGF		\$260.00	\$260.00	2015	9/30/2015	20151 SS11501110048	0	SMALL BUSINESS
CNK PUBLICATIONS, LLC	VE EXPRESS REPORTING IGF::CT::IGF		\$253.60	\$253.60	2015	9/30/2015	20151 SS10541140645	0	SMALL BUSINESS
HARPOOL, WILLIAM R	VE EXPRESS REPORTING IGF::CT::IGF		\$251.20	\$251.20	2015	9/30/2015	20151 SS10541140525	0	SMALL BUSINESS
THINKLOGICAL, INC.	IGF::OT::IGF REQUEST FOR RATIFICATION OF UNAUTHOR		\$250.00	\$250.00	2015	6/19/2015	SS001550175	0	SMALL BUSINESS
GRAY, ILENE R.	VE EXPRESS REPORTING IGF::CT::IGF		\$249.00	\$249.00	2015	9/30/2015	2015 SS10781160205	0	SMALL BUSINESS
JONES, LYNN A	VE EXPRESS REPORTING IGF::CT::IGF		\$249.00	\$249.00	2015	9/30/2015	20151 SS11521100021	0	SMALL BUSINESS
CONWAY, JAMES F	VE EXPRESS REPORTING IGF::CT::IGF		\$248.60	\$248.60	2015	9/30/2015	20151 SS11501310009	0	SMALL BUSINESS
REHABILITATION & VOCATIONAL CONSULTANTS, L L C	VE EXPRESS REPORTING IGF::CT::IGF		\$248.00	\$248.00	2015	9/30/2015	2015 SS10781360051	0	SMALL BUSINESS
STAMPLEY CONSULTING LLC	VE EXPRESS REPORTING IGF::CT::IGF		\$248.00	\$248.00	2015	9/30/2015	20151 SS10781160223	0	SMALL BUSINESS
FAST, RUTH	VE EXPRESS REPORTING IGF::CT::IGF		\$247.50	\$247.50	2015	9/30/2015	20151 SS10381130083	0	SMALL BUSINESS
ACHIEVE CONSULTING TEAM, INC.	VE EXPRESS REPORTING IGF::CT::IGF		\$244.00	\$244.00	2015	9/30/2015	20151 SS11521100023	0	SMALL BUSINESS
CAPITOL CASE MANAGEMENT INC	VE EXPRESS REPORTING IGF::CT::IGF		\$242.36	\$242.36	2015	9/30/2015	20151 SS10381130231	0	SMALL BUSINESS
STEBNICKI, MARK	VE EXPRESS REPORTING IGF::CT::IGF		\$241.50	\$241.50	2015	9/30/2015	20151 SS10541140715	0	SMALL BUSINESS
KENDRICK MD, RONALD E	ME EXPRESS REPORTING - MENTAL HEALTH IGF::CT::IGF		\$240.00	\$240.00	2015	9/30/2015	20151 SS10631150134	0	SMALL BUSINESS
ENRIGHT, MICHAEL PHD	VE EXPRESS REPORTING IGF::CT::IGF		\$240.00	\$240.00	2015	9/30/2015	20151 SS11511180006	0	SMALL BUSINESS
CHRISTINA BEATTY-CODY	VE EXPRESS REPORTING IGF::CT::IGF		\$239.60	\$239.60	2015	9/30/2015	20151 SS10381130017	0	SMALL BUSINESS
HAMMOND, BOBBY W	ME EXPRESS REPORTING - MENTAL HEALTH IGF::CT::IGF		\$213.76	\$213.76	2015	9/30/2015	20151 SS10631150109	0	SMALL BUSINESS
BARRY S HENSLEY DR	VE EXPRESS REPORTING IGF::CT::IGF		\$210.47	\$210.47	2015	9/30/2015	20151 SS10381130061	0	SMALL BUSINESS
RONALD DEVERE MD PA	ME EXPRESS REPORTING - MENTAL HEALTH IGF::CT::IGF		\$210.00	\$210.00	2015	9/30/2015	20151 SS10781160096	0	SMALL BUSINESS
VERCILLO, AMY E	VE EXPRESS REPORTING IGF::CT::IGF		\$210.00	\$210.00	2015	9/30/2015	20151 SS11501110065	0	SMALL BUSINESS
HOWARD, SUSAN	VE EXPRESS REPORTING IGF::CT::IGF		\$204.00	\$204.00	2015	9/30/2015	20151 SS11501410009	0	SMALL BUSINESS
MAY, ABBE	VE EXPRESS REPORTING IGF::CT::IGF		\$204.00	\$204.00	2015	9/30/2015	20151 SS10881190093	0	SMALL BUSINESS
REHABILITATION APPROACH THE	VE EXPRESS REPORTING IGF::CT::IGF		\$204.00	\$204.00	2015	9/30/2015	20151 SS10631350007	0	SMALL BUSINESS
LORIN LOVELY REHAB SERVICES	VE EXPRESS REPORTING IGF::CT::IGF		\$197.73	\$197.73	2015	9/30/2015	20151 SS10541140487	0	SMALL BUSINESS
SOLDNER, JAMES	VE EXPRESS REPORTING IGF::CT::IGF		\$191.00	\$191.00	2015	9/30/2015	20151 SS11511180113	0	SMALL BUSINESS
CHRISTIAN COMMUNITY RESOURCES	ME EXPRESS REPORTING - MENTAL HEALTH IGF::CT::IGF		\$190.25	\$190.25	2015	9/30/2015	20151 SS10631150196	0	SMALL BUSINESS
WELLS & ASSOCIATES	VE EXPRESS REPORTING IGF::CT::IGF		\$190.16	\$190.16	2015	9/30/2015	20151 SS10381130045	0	SMALL BUSINESS
ERIC PRUITT	ME EXPRESS REPORTING - MENTAL HEALTH IGF::CT::IGF		\$189.23	\$189.23	2015	9/30/2015	20151 SS10631150391	0	SMALL BUSINESS
SMIDT, JENNIFER	VE EXPRESS REPORTING IGF::CT::IGF		\$188.80	\$188.80	2015	9/30/2015	20151 SS10691370005	0	SMALL BUSINESS
JOHN F MCGOWAN	VE EXPRESS REPORTING IGF::CT::IGF		\$188.00	\$188.00	2015	9/30/2015	20151 SS10691170039	0	SMALL BUSINESS
COUNSELING CENTER TUPELO LLP	VE EXPRESS REPORTING IGF::CT::IGF		\$186.56	\$186.56	2015	9/30/2015	20151 SS10541140345	0	SMALL BUSINESS
WINSLOW MD, RICHARD S	IGF::CL::IGF WINSLOW, MC, REG. 10		\$186.00	\$186.00	2015	7/28/2015	1 SS10154C011	1	SMALL BUSINESS

Sole Source Contracts  
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Vendor Name	Description of Requirement	Action Obligation	Base and All Options Value	Fiscal Year	Date Signed	PO/Delivery Order/Task Order/Call#	Parent Contract	Mod #	Contracting Officers Business Size Selection
PROREHAB, INC	VE EXPRESS REPORTING IGF::CT::IGF		\$185.20	\$185.20	2015	9/30/2015	20151SS10541140685	0	SMALL BUSINESS
SKAHAN, KRISTINE	VE EXPRESS REPORTING IGF::CT::IGF		\$184.95	\$184.95	2015	9/30/2015	20151SS10691170017	0	SMALL BUSINESS
MELISSA NEEL VOCATIONAL COUNSELOR	VE EXPRESS REPORTING IGF::CT::IGF		\$173.13	\$173.13	2015	9/30/2015	20151SS10541140529	0	SMALL BUSINESS
OCCUPATIONAL PLANNING & PLACEMENT INC	ME EXPRESS REPORTING - MENTAL HEALTH IGF::CT::IGF		\$170.60	\$170.60	2015	9/30/2015	20151SS10631150289	0	SMALL BUSINESS
R. EVANS PROFESSIONAL DEVELOPMENT CONSULTATION, INC.	VE EXPRESS REPORTING IGF::CT::IGF		\$167.72	\$167.72	2015	9/30/2015	20151SS10541140551	0	SMALL BUSINESS
GOODMAN, JOSEPH L	VE EXPRESS REPORTING IGF::CT::IGF		\$166.00	\$166.00	2015	9/30/2015	20151SS11501110061	0	SMALL BUSINESS
JAY A STEINBRENNER	VE EXPRESS REPORTING IGF::CT::IGF		\$166.00	\$166.00	2015	9/30/2015	20151SS10251120041	0	SMALL BUSINESS
VAUGHN, ANDREW	VE EXPRESS REPORTING IGF::CT::IGF		\$166.00	\$166.00	2015	9/30/2015	20151SS10251120045	0	SMALL BUSINESS
VOCATIONAL MEDICAL CONSULTING, INC.	VE EXPRESS REPORTING IGF::CT::IGF		\$166.00	\$166.00	2015	9/30/2015	2015SS10631150335	0	SMALL BUSINESS
BARNES, FRANK L	ME EXPRESS REPORTING - MENTAL HEALTH IGF::CT::IGF		\$160.00	\$160.00	2015	9/30/2015	20151SS10781160102	0	OTHER THAN SMALL BUSINESS
BILLINGS FUESS	ME EXPRESS REPORTING - MENTAL HEALTH IGF::CT::IGF		\$160.00	\$160.00	2015	9/30/2015	20151SS11501110014	0	SMALL BUSINESS
BROVENDER, ARTHUR MD	ME EXPRESS REPORTING - MENTAL HEALTH IGF::CT::IGF		\$160.00	\$160.00	2015	9/30/2015	20151SS10541140146	0	SMALL BUSINESS
BRYAN, EDWIN L	ME EXPRESS REPORTING - MENTAL HEALTH IGF::CT::IGF		\$160.00	\$160.00	2015	9/30/2015	20151SS10541140184	0	SMALL BUSINESS
ESKINAZI, VICTORIA	ME EXPRESS REPORTING - MENTAL HEALTH IGF::CT::IGF		\$160.00	\$160.00	2015	9/30/2015	20151SS10631150050	0	SMALL BUSINESS
GOLUB, HERBERT P.	ME EXPRESS REPORTING - MENTAL HEALTH IGF::CT::IGF		\$160.00	\$160.00	2015	9/30/2015	20151SS11501110058	0	SMALL BUSINESS
HEINEMANN, ALLEN	ME EXPRESS REPORTING - MENTAL HEALTH IGF::CT::IGF		\$160.00	\$160.00	2015	9/30/2015	20151SS10631150066	0	SMALL BUSINESS
HYMOFF, IRA H	ME EXPRESS REPORTING - MENTAL HEALTH IGF::CT::IGF		\$160.00	\$160.00	2015	9/30/2015	20151SS11501110006	0	SMALL BUSINESS
JAMES F WARGEL	ME EXPRESS REPORTING - MENTAL HEALTH IGF::CT::IGF		\$160.00	\$160.00	2015	9/30/2015	20151SS10631150218	0	SMALL BUSINESS
JONAS, ALFRED G	ME EXPRESS REPORTING - MENTAL HEALTH IGF::CT::IGF		\$160.00	\$160.00	2015	9/30/2015	20151SS10541140188	0	SMALL BUSINESS
LEE T BESEN MD	ME EXPRESS REPORTING - MENTAL HEALTH IGF::CT::IGF		\$160.00	\$160.00	2015	9/30/2015	20151SS10381130036	0	OTHER THAN SMALL BUSINESS
MAR MEDICAL CONSULTANTS, P.A.	ME EXPRESS REPORTING - MENTAL HEALTH IGF::CT::IGF		\$160.00	\$160.00	2015	9/30/2015	20151SS10381130068	0	SMALL BUSINESS
NORTHWEST NEUROPSYCHOLOGY INC	ME EXPRESS REPORTING - MENTAL HEALTH IGF::CT::IGF		\$160.00	\$160.00	2015	9/30/2015	2015SS10631150236	0	SMALL BUSINESS
PEPI GRANAT MD	ME EXPRESS REPORTING - MENTAL HEALTH IGF::CT::IGF		\$160.00	\$160.00	2015	9/30/2015	20151SS10541140114	0	SMALL BUSINESS
RICHARD T THIO MD	ME EXPRESS REPORTING - MENTAL HEALTH IGF::CT::IGF		\$160.00	\$160.00	2015	9/30/2015	2015SS10541140140	0	OTHER THAN SMALL BUSINESS
RUBIN, LEONARD M	ME EXPRESS REPORTING - MENTAL HEALTH IGF::CT::IGF		\$160.00	\$160.00	2015	9/30/2015	20151SS11501110056	0	SMALL BUSINESS
SKLAROFF, ROBERT B MD	ME EXPRESS REPORTING - MENTAL HEALTH IGF::CT::IGF		\$160.00	\$160.00	2015	9/30/2015	20151SS10381130102	0	OTHER THAN SMALL BUSINESS
STEVEN GOLDSTEIN, M.D. & ASSOCIATES, P.A.	ME EXPRESS REPORTING - MENTAL HEALTH IGF::CT::IGF		\$160.00	\$160.00	2015	9/30/2015	20151SS10781160148	0	SMALL BUSINESS
THOMAS J MAXWELL MD	ME EXPRESS REPORTING - MENTAL HEALTH IGF::CT::IGF		\$160.00	\$160.00	2015	9/30/2015	20151SS10881190064	0	SMALL BUSINESS
WEST M.D., DAVID A.	ME EXPRESS REPORTING - MENTAL HEALTH IGF::CT::IGF		\$160.00	\$160.00	2015	9/30/2015	20151SS10881190076	0	SMALL BUSINESS
ZUCKERMAN MD, BERNARD D	ME EXPRESS REPORTING - MENTAL HEALTH IGF::CT::IGF		\$160.00	\$160.00	2015	9/30/2015	20151SS11501110044	0	SMALL BUSINESS
DAVID M GLASSMIRE	VE EXPRESS REPORTING IGF::CT::IGF		\$160.00	\$160.00	2015	9/30/2015	20151SS10881190040	0	SMALL BUSINESS
GUSTAVSON PHD, NORMAN	VE EXPRESS REPORTING IGF::CT::IGF		\$160.00	\$160.00	2015	9/30/2015	2015SS11521100006	0	SMALL BUSINESS
JOHN DAVID SABOW, MD	VE EXPRESS REPORTING IGF::CT::IGF		\$160.00	\$160.00	2015	9/30/2015	20151SS11511180046	0	SMALL BUSINESS
KOPPANG, LAURA	VE EXPRESS REPORTING IGF::CT::IGF		\$160.00	\$160.00	2015	9/30/2015	2015SS10881190044	0	SMALL BUSINESS
ROBERT E PELC PHD ABP PROFESSIONAL CO	VE EXPRESS REPORTING IGF::CT::IGF		\$160.00	\$160.00	2015	9/30/2015	20151SS11511180020	0	SMALL BUSINESS
SIDNEY WALTER	VE EXPRESS REPORTING IGF::CT::IGF		\$160.00	\$160.00	2015	9/30/2015	20151SS10881190016	0	SMALL BUSINESS
WEINGARTEN, GERALD M.D. INC	VE EXPRESS REPORTING IGF::CT::IGF		\$160.00	\$160.00	2015	9/30/2015	20151SS10881190132	0	SMALL BUSINESS
CHRISTENSEN, JESSICA	ME EXPRESS REPORTING - MENTAL HEALTH IGF::CT::IGF		\$159.85	\$159.85	2015	9/30/2015	20151SS10631150071	0	SMALL BUSINESS
FIDANZA, NICHOLAS S	VE EXPRESS REPORTING IGF::CT::IGF		\$157.50	\$157.50	2015	9/30/2015	20151SS10541140481	0	SMALL BUSINESS
NORTH FLORIDA VOCATIONAL CASE MANAGEMENT SERVICES	VE EXPRESS REPORTING IGF::CT::IGF		\$155.60	\$155.60	2015	9/30/2015	20151SS10541140577	0	SMALL BUSINESS
LIFE WORK CONSULTING, INC.	VE EXPRESS REPORTING IGF::CT::IGF		\$155.00	\$155.00	2015	9/30/2015	20151SS11511180053	0	SMALL BUSINESS
HOLMES, BARBARA A.	VE EXPRESS REPORTING IGF::CT::IGF		\$154.15	\$154.15	2015	9/30/2015	20151SS10541140183	0	SMALL BUSINESS
TERRILL & ASSOCIATES INC	VE EXPRESS REPORTING IGF::CT::IGF		\$154.00	\$154.00	2015	9/30/2015	20151SS10691470010	0	SMALL BUSINESS
FISHER, LEONARD MARION PH.D	ME EXPRESS REPORTING - MENTAL HEALTH IGF::CT::IGF		\$149.00	\$149.00	2015	9/30/2015	20151SS10631150361	0	SMALL BUSINESS
REIGEL VOCATIONAL CONSULTATION	VE EXPRESS REPORTING IGF::CT::IGF		\$146.42	\$146.42	2015	9/30/2015	20151SS11521100081	0	SMALL BUSINESS
ATKINSON, JOSEPH MARTIN	VE EXPRESS REPORTING IGF::CT::IGF		\$143.00	\$143.00	2015	9/30/2015	20151SS10251420003	0	SMALL BUSINESS
STEWART, THOMAS J	VE EXPRESS REPORTING IGF::CT::IGF		\$142.60	\$142.60	2015	9/30/2015	20151SS10541140367	0	SMALL BUSINESS
CATHY SANDERS	VE EXPRESS REPORTING IGF::CT::IGF		\$140.30	\$140.30	2015	9/30/2015	20151SS10541140637	0	SMALL BUSINESS
LINDAHL & SANTNER	VE EXPRESS REPORTING IGF::CT::IGF		\$139.45	\$139.45	2015	9/30/2015	20151SS10691170101	0	SMALL BUSINESS
KYNEXIA, LLC	VE EXPRESS REPORTING IGF::CT::IGF		\$139.15	\$139.15	2015	9/30/2015	20151SS10541140411	0	SMALL BUSINESS
MYERS, DANIEL E	VE EXPRESS REPORTING IGF::CT::IGF		\$139.15	\$139.15	2015	9/30/2015	20151SS10541140227	0	SMALL BUSINESS
DETTMER, DAVID M	VE EXPRESS REPORTING IGF::CT::IGF		\$132.00	\$132.00	2015	9/30/2015	20151SS10881190045	0	SMALL BUSINESS
GERRISH, JANE A	VE EXPRESS REPORTING IGF::CT::IGF		\$132.00	\$132.00	2015	9/30/2015	20151SS11501110025	0	SMALL BUSINESS
BRENDEMUEHL, JUDITH	ME EXPRESS REPORTING - MENTAL HEALTH IGF::CT::IGF		\$131.05	\$131.05	2015	9/30/2015	20152SS10381130066	0	SMALL BUSINESS
AXLINE, JOHN W MD	ME EXPRESS REPORTING - MENTAL HEALTH IGF::CT::IGF		\$130.00	\$130.00	2015	9/30/2015	20151SS11501110008	0	SMALL BUSINESS
BENTLIF, PHILIP	ME EXPRESS REPORTING - MENTAL HEALTH IGF::CT::IGF		\$130.00	\$130.00	2015	9/30/2015	20151SS10781160142	0	SMALL BUSINESS
CRUZ, EDWIN M D PC	ME EXPRESS REPORTING - MENTAL HEALTH IGF::CT::IGF		\$130.00	\$130.00	2015	9/30/2015	20151SS10381130108	0	SMALL BUSINESS
DURHAM, HENRY	ME EXPRESS REPORTING - MENTAL HEALTH IGF::CT::IGF		\$130.00	\$130.00	2015	9/30/2015	2015SS10541140070	0	SMALL BUSINESS
FARMATI MD, OSCAR	ME EXPRESS REPORTING - MENTAL HEALTH IGF::CT::IGF		\$130.00	\$130.00	2015	9/30/2015	20151SS10541140148	0	SMALL BUSINESS
GAETA, JOSEPH R MD	ME EXPRESS REPORTING - MENTAL HEALTH IGF::CT::IGF		\$130.00	\$130.00	2015	9/30/2015	20151SS11501110076	0	SMALL BUSINESS

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Vendor Name	Description of Requirement	Action Obligation	Base and All Options Value	Fiscal Year	Date Signed	PO/Delivery Order/Task Order/Cal#	Parent Contract	Mod #	Contracting Officers Business Size Selection
JOHN R MORSE MD INC	ME EXPRESS REPORTING - MENTAL HEALTH IGF::CT::IGF		\$130.00	\$130.00	2015	9/30/2015	20151SS10881190048	0	SMALL BUSINESS
NEWTON B WHITE	ME EXPRESS REPORTING - MENTAL HEALTH IGF::CT::IGF		\$130.00	\$130.00	2015	9/30/2015	20151SS10691170004	0	SMALL BUSINESS
PATRICK-MACKINNON, SUSANNE	ME EXPRESS REPORTING - MENTAL HEALTH IGF::CT::IGF		\$130.00	\$130.00	2015	9/30/2015	20151SS11501410006	0	SMALL BUSINESS
STRAHL MD, NATHAN ROBERT	ME EXPRESS REPORTING - MENTAL HEALTH IGF::CT::IGF		\$130.00	\$130.00	2015	9/30/2015	20151SS10541140042	0	SMALL BUSINESS
WESLEY E SCOTT MD	ME EXPRESS REPORTING - MENTAL HEALTH IGF::CT::IGF		\$130.00	\$130.00	2015	9/30/2015	20151SS10781160118	0	SMALL BUSINESS
WINKLER MEDICAL PRACTICE, LLC	ME EXPRESS REPORTING - MENTAL HEALTH IGF::CT::IGF		\$130.00	\$130.00	2015	9/30/2015	20151SS10691170014	0	SMALL BUSINESS
DURHAM, HENRY	VE EXPRESS REPORTING IGF::CT::IGF		\$130.00	\$130.00	2015	9/30/2015	20151SS10541140070	0	SMALL BUSINESS
HUNTER, GRETA	VE EXPRESS REPORTING IGF::CT::IGF		\$130.00	\$130.00	2015	9/30/2015	20151SS11511180026	0	SMALL BUSINESS
PTC PSYCHOTHERAPY	VE EXPRESS REPORTING IGF::CT::IGF		\$130.00	\$130.00	2015	9/30/2015	20151SS11521100034	0	SMALL BUSINESS
COMCAST OF MARYLAND LIMITED PARTNERSHIP	CORRECT THE PRICING IN ACCORDANCE WITH THE TERM		\$129.70	\$129.70	2015	12/8/2014	SS001250040	15	OTHER THAN SMALL BUSINESS
DEAN DEBBIE B	VE EXPRESS REPORTING IGF::CT::IGF		\$128.96	\$128.96	2015	9/30/2015	20151SS10541140509	0	SMALL BUSINESS
BUBAN MARY EILEEN PSYD	ME EXPRESS REPORTING - MENTAL HEALTH IGF::CT::IGF		\$126.61	\$126.61	2015	9/30/2015	20152SS10631150026	0	SMALL BUSINESS
VOCATIONAL DIRECTIONS, INC.	VE EXPRESS REPORTING IGF::CT::IGF		\$125.00	\$125.00	2015	9/30/2015	20151SS11501110083	0	SMALL BUSINESS
YOSHIOKA, JOY	ME EXPRESS REPORTING - MENTAL HEALTH IGF::CT::IGF		\$121.00	\$121.00	2015	9/30/2015	20151SS10881190059	0	SMALL BUSINESS
ELIZABETH ALBRECHT	VE EXPRESS REPORTING IGF::CT::IGF		\$121.00	\$121.00	2015	9/30/2015	20151SS10691170085	0	SMALL BUSINESS
JESUS DUARTE	VE EXPRESS REPORTING IGF::CT::IGF		\$121.00	\$121.00	2015	9/30/2015	20151SS10781160209	0	OTHER THAN SMALL BUSINESS
SALEK, JEANNINE	VE EXPRESS REPORTING IGF::CT::IGF		\$120.75	\$120.75	2015	9/30/2015	20151SS10541140157	0	SMALL BUSINESS
KUTSCHBACH, AMY	ME EXPRESS REPORTING - MENTAL HEALTH IGF::CT::IGF		\$115.00	\$115.00	2015	9/30/2015	20151SS10631150151	0	SMALL BUSINESS
ANDERSON, ERIC R	VE EXPRESS REPORTING IGF::CT::IGF		\$115.00	\$115.00	2015	9/30/2015	20151SS10541140663	0	SMALL BUSINESS
WASHINGTON, PHD, CAREY A	VE EXPRESS REPORTING IGF::CT::IGF		\$115.00	\$115.00	2015	9/30/2015	20151SS10541140335	0	SMALL BUSINESS
SUE N BERTHAUME	VE EXPRESS REPORTING IGF::CT::IGF		\$113.85	\$113.85	2015	9/30/2015	20151SS10541140395	0	SMALL BUSINESS
SIMS, DIANA C & ASSOCIATES INC	VE EXPRESS REPORTING IGF::CT::IGF		\$112.08	\$112.08	2015	9/30/2015	20151SS10381130123	0	SMALL BUSINESS
FLYNN, JAMES D	VE EXPRESS REPORTING IGF::CT::IGF		\$110.40	\$110.40	2015	9/30/2015	20151SS10541140249	0	SMALL BUSINESS
JACKSON, DAVID MHS	VE EXPRESS REPORTING IGF::CT::IGF		\$105.28	\$105.28	2015	9/30/2015	20151SS10541140583	0	SMALL BUSINESS
DITRINCO, CHRISTINE	VE EXPRESS REPORTING IGF::CT::IGF		\$105.00	\$105.00	2015	9/30/2015	20151SS10251420013	0	SMALL BUSINESS
NETWORK REHABILITATION SERVICES, INC.	VE EXPRESS REPORTING IGF::CT::IGF		\$103.50	\$103.50	2015	9/30/2015	20151SS10541140293	0	SMALL BUSINESS
JAMES E GANOE	VE EXPRESS REPORTING IGF::CT::IGF		\$100.80	\$100.80	2015	9/30/2015	20151SS10381130043	0	SMALL BUSINESS
HERMAN MILLER, INC.	SYSTEMS FURNITURE CONTRACT		\$100.00	\$100.00	2015	4/22/2015	SS001260003	30	OTHER THAN SMALL BUSINESS
SIMS, DIANA C & ASSOCIATES INC	VE EXPRESS REPORTING IGF::CT::IGF		\$98.90	\$98.90	2015	9/30/2015	20151SS10381130125	0	SMALL BUSINESS
ANDERT, JEFFREY N.	ME EXPRESS REPORTING - MENTAL HEALTH IGF::CT::IGF		\$98.55	\$98.55	2015	9/30/2015	20151SS10631150020	0	SMALL BUSINESS
SUSANNA D ROCHE	VE EXPRESS REPORTING IGF::CT::IGF		\$98.33	\$98.33	2015	9/30/2015	20151SS10541140343	0	SMALL BUSINESS
HAUER, ALLEN PHD	ME EXPRESS REPORTING - MENTAL HEALTH IGF::CT::IGF		\$94.08	\$94.08	2015	9/30/2015	20151SS10631150116	0	SMALL BUSINESS
LYNN R HAYES	VE EXPRESS REPORTING IGF::CT::IGF		\$93.25	\$93.25	2015	9/30/2015	20151SS10541140237	0	SMALL BUSINESS
ORSON, JAY M	ME EXPRESS REPORTING - MENTAL HEALTH IGF::CT::IGF		\$92.95	\$92.95	2015	9/30/2015	20151SS11501110062	0	SMALL BUSINESS
NADOLSKY, JULIAN M	VE EXPRESS REPORTING IGF::CT::IGF		\$92.55	\$92.55	2015	9/30/2015	20151SS10541140517	0	SMALL BUSINESS
CAREER CONSULTANT	ME EXPRESS REPORTING - MENTAL HEALTH IGF::CT::IGF		\$88.14	\$88.14	2015	9/30/2015	20151SS10631150129	0	SMALL BUSINESS
JACQUELYN SCHABACKER	ME EXPRESS REPORTING - MENTAL HEALTH IGF::CT::IGF		\$88.00	\$88.00	2015	9/30/2015	20151SS10631150205	0	SMALL BUSINESS
PEREGRINE CONSULTING LLC	ME EXPRESS REPORTING - MENTAL HEALTH IGF::CT::IGF		\$88.00	\$88.00	2015	9/30/2015	20151SS10631150321	0	SMALL BUSINESS
VAN VLEET, RUTH	VE EXPRESS REPORTING IGF::CT::IGF		\$88.00	\$88.00	2015	9/30/2015	20151SS10881190107	0	SMALL BUSINESS
YOSHIOKA, JO ANN	VE EXPRESS REPORTING IGF::CT::IGF		\$88.00	\$88.00	2015	9/30/2015	20151SS10881190275	0	SMALL BUSINESS
MOORE, JAMES ELTON	VE EXPRESS REPORTING IGF::CT::IGF		\$86.63	\$86.63	2015	9/30/2015	20151SS10541140299	0	SMALL BUSINESS
LAPLANTE, LOUIS	VE EXPRESS REPORTING IGF::CT::IGF		\$86.48	\$86.48	2015	9/30/2015	20151SS11501110031	0	SMALL BUSINESS
RENEE SMITH & ASSOCIATES, INC.	VE EXPRESS REPORTING IGF::CT::IGF		\$86.24	\$86.24	2015	9/30/2015	20151SS10541140535	0	SMALL BUSINESS
MEUNIER, THOMAS JR,	VE EXPRESS REPORTING IGF::CT::IGF		\$85.10	\$85.10	2015	9/30/2015	20151SS10781160297	0	SMALL BUSINESS
MALIK & ASSOCIATES	ME EXPRESS REPORTING - MENTAL HEALTH IGF::CT::IGF		\$83.00	\$83.00	2015	9/30/2015	20151SS10631150363	0	SMALL BUSINESS
MICHAEL A, PHD KLEIN	ME EXPRESS REPORTING - MENTAL HEALTH IGF::CT::IGF		\$83.00	\$83.00	2015	9/30/2015	20151SS10631150251	0	SMALL BUSINESS
ANNE DARNELL REHABILITATION SERVICES	VE EXPRESS REPORTING IGF::CT::IGF		\$83.00	\$83.00	2015	9/30/2015	20151SS10541140259	0	SMALL BUSINESS
AVANTI REHABILITATION	VE EXPRESS REPORTING IGF::CT::IGF		\$83.00	\$83.00	2015	9/30/2015	20151SS11501210008	0	SMALL BUSINESS
BARTMANN AND ASSOCIATES, LLC	VE EXPRESS REPORTING IGF::CT::IGF		\$83.00	\$83.00	2015	9/30/2015	20151SS11511180091	0	SMALL BUSINESS
BETH DRURY INC	VE EXPRESS REPORTING IGF::CT::IGF		\$83.00	\$83.00	2015	9/30/2015	20151SS10781160103	0	SMALL BUSINESS
CALANDRA, EDMOND	VE EXPRESS REPORTING IGF::CT::IGF		\$83.00	\$83.00	2015	9/30/2015	20151SS11501110003	0	SMALL BUSINESS
CAREER CONSULTING INCORPORATED	VE EXPRESS REPORTING IGF::CT::IGF		\$83.00	\$83.00	2015	9/30/2015	20152SS10691170073	0	SMALL BUSINESS
CHRISTENSEN VOCATIONAL SERVICES	VE EXPRESS REPORTING IGF::CT::IGF		\$83.00	\$83.00	2015	9/30/2015	20151SS11511180027	0	SMALL BUSINESS
COGLIANO, ELAINE G	VE EXPRESS REPORTING IGF::CT::IGF		\$83.00	\$83.00	2015	9/30/2015	20151SS11501110009	0	SMALL BUSINESS
CULMER COUNSELING SERVICES LLC	VE EXPRESS REPORTING IGF::CT::IGF		\$83.00	\$83.00	2015	9/30/2015	20151SS10541340043	0	SMALL BUSINESS
DARLENE MCQUARY	VE EXPRESS REPORTING IGF::CT::IGF		\$83.00	\$83.00	2015	9/30/2015	20151SS10881190143	0	SMALL BUSINESS
DAVIES, CORINNA	VE EXPRESS REPORTING IGF::CT::IGF		\$83.00	\$83.00	2015	9/30/2015	20151SS10631150437	0	SMALL BUSINESS
DR JOHN MATZILEVICH	VE EXPRESS REPORTING IGF::CT::IGF		\$83.00	\$83.00	2015	9/30/2015	20151SS11501110097	0	SMALL BUSINESS
DURR, DIANE	VE EXPRESS REPORTING IGF::CT::IGF		\$83.00	\$83.00	2015	9/30/2015	20151SS11501210010	0	SMALL BUSINESS
EDDY'S ENTERTAINMENT, INC.	VE EXPRESS REPORTING IGF::CT::IGF		\$83.00	\$83.00	2015	9/30/2015	20151SS10381130143	0	SMALL BUSINESS

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Vendor Name	Description of Requirement	Action Obligation	Base and All Options Value	Fiscal Year	Date Signed	PO/Delivery Order/Task Order/Cal#	Parent Contract	Mod #	Contracting Officers Business Size Selection
FARRELL, TIMOTHY J MS	VE EXPRESS REPORTING IGF::CT::IGF		\$83.00	\$83.00	2015	9/30/2015	20151SS10881390035	0	SMALL BUSINESS
FUSCALDO, NICOLE M	VE EXPRESS REPORTING IGF::CT::IGF		\$83.00	\$83.00	2015	9/30/2015	20151SS10781460010	0	SMALL BUSINESS
GLORIA LASOFF	VE EXPRESS REPORTING IGF::CT::IGF		\$83.00	\$83.00	2015	9/30/2015	20151SS10881190241	0	SMALL BUSINESS
HARDWAY, JAMES E.	VE EXPRESS REPORTING IGF::CT::IGF		\$83.00	\$83.00	2015	9/30/2015	2015SS11511180095	0	SMALL BUSINESS
HECK, MARGARET	VE EXPRESS REPORTING IGF::CT::IGF		\$83.00	\$83.00	2015	9/30/2015	20151SS10251420011	0	SMALL BUSINESS
HICKEY, RICHARD J.	VE EXPRESS REPORTING IGF::CT::IGF		\$83.00	\$83.00	2015	9/30/2015	20151SS10541140365	0	SMALL BUSINESS
HOWELL CONSULTING LLC	VE EXPRESS REPORTING IGF::CT::IGF		\$83.00	\$83.00	2015	9/30/2015	20151SS10541440023	0	SMALL BUSINESS
HULLENDER COUNSELING SERVICES	VE EXPRESS REPORTING IGF::CT::IGF		\$83.00	\$83.00	2015	9/30/2015	20151SS10691470008	0	SMALL BUSINESS
ITALCOL INC	VE EXPRESS REPORTING IGF::CT::IGF		\$83.00	\$83.00	2015	9/30/2015	2015SS10881390017	0	SMALL BUSINESS
JANIKOWSKI, TIMOTHY	VE EXPRESS REPORTING IGF::CT::IGF		\$83.00	\$83.00	2015	9/30/2015	20151SS10251120061	0	SMALL BUSINESS
JILL BROWN CASE MANAGEMENT	VE EXPRESS REPORTING IGF::CT::IGF		\$83.00	\$83.00	2015	9/30/2015	20151SS11501110015	0	SMALL BUSINESS
JUBREY, RENEE	VE EXPRESS REPORTING IGF::CT::IGF		\$83.00	\$83.00	2015	9/30/2015	20151SS11501110027	0	SMALL BUSINESS
KATHY M HODGSON	VE EXPRESS REPORTING IGF::CT::IGF		\$83.00	\$83.00	2015	9/30/2015	20151SS10691170077	0	SMALL BUSINESS
KEYSTONE REHABILITATION INC	VE EXPRESS REPORTING IGF::CT::IGF		\$83.00	\$83.00	2015	9/30/2015	20151SS10381130023	0	SMALL BUSINESS
LARAIA, MICHAEL	VE EXPRESS REPORTING IGF::CT::IGF		\$83.00	\$83.00	2015	9/30/2015	20151SS11501110045	0	SMALL BUSINESS
LERNER, HANK S	VE EXPRESS REPORTING IGF::CT::IGF		\$83.00	\$83.00	2015	9/30/2015	20151SS11501110035	0	SMALL BUSINESS
LUSTIG, DANIEL C.	VE EXPRESS REPORTING IGF::CT::IGF		\$83.00	\$83.00	2015	9/30/2015	20151SS10541140515	0	SMALL BUSINESS
M PENNY CARR	VE EXPRESS REPORTING IGF::CT::IGF		\$83.00	\$83.00	2015	9/30/2015	2015SS10631350043	0	SMALL BUSINESS
MARINI,IRMO	VE EXPRESS REPORTING IGF::CT::IGF		\$83.00	\$83.00	2015	9/30/2015	20151SS10781160037	0	SMALL BUSINESS
MELOY ENTERPRISES, INC.	VE EXPRESS REPORTING IGF::CT::IGF		\$83.00	\$83.00	2015	9/30/2015	20151SS10781160303	0	SMALL BUSINESS
NADINE HENZES	VE EXPRESS REPORTING IGF::CT::IGF		\$83.00	\$83.00	2015	9/30/2015	20151SS10381130041	0	SMALL BUSINESS
OLDS, COURTNEY S	VE EXPRESS REPORTING IGF::CT::IGF		\$83.00	\$83.00	2015	9/30/2015	20151SS11501110017	0	SMALL BUSINESS
PATERWIC, ROBERT	VE EXPRESS REPORTING IGF::CT::IGF		\$83.00	\$83.00	2015	9/30/2015	20151SS11501110073	0	SMALL BUSINESS
PAULSON, LYNN A	VE EXPRESS REPORTING IGF::CT::IGF		\$83.00	\$83.00	2015	9/30/2015	20151SS11501210006	0	SMALL BUSINESS
PEAK SOLUTIONS VOCATIONAL SERVICES, LLC	VE EXPRESS REPORTING IGF::CT::IGF		\$83.00	\$83.00	2015	9/30/2015	20151SS10251320001	0	SMALL BUSINESS
PHOENIX REHABILITATION CORP	VE EXPRESS REPORTING IGF::CT::IGF		\$83.00	\$83.00	2015	9/30/2015	20151SS10541140407	0	SMALL BUSINESS
PROFESSIONAL CONSULTING SERVICES INC	VE EXPRESS REPORTING IGF::CT::IGF		\$83.00	\$83.00	2015	9/30/2015	20151SS11521200006	0	SMALL BUSINESS
RB REHABILITATION	VE EXPRESS REPORTING IGF::CT::IGF		\$83.00	\$83.00	2015	9/30/2015	20151SS11501110013	0	SMALL BUSINESS
REHABILITATION SERVICES ASSOCIATES,LLC	VE EXPRESS REPORTING IGF::CT::IGF		\$83.00	\$83.00	2015	9/30/2015	20151SS11501310003	0	SMALL BUSINESS
SACHS, STEVEN	VE EXPRESS REPORTING IGF::CT::IGF		\$83.00	\$83.00	2015	9/30/2015	20151SS11501110057	0	SMALL BUSINESS
SALVATORE, GAROZZO	VE EXPRESS REPORTING IGF::CT::IGF		\$83.00	\$83.00	2015	9/30/2015	20151SS10251120053	0	SMALL BUSINESS
SANDY RICHTER AND ASSOCIATES INC	VE EXPRESS REPORTING IGF::CT::IGF		\$83.00	\$83.00	2015	9/30/2015	20151SS10881190165	0	SMALL BUSINESS
SMITH, KENNETH R MA CRC VOCATIONAL REHABILATION	VE EXPRESS REPORTING IGF::CT::IGF		\$83.00	\$83.00	2015	9/30/2015	20151SS11501110047	0	SMALL BUSINESS
SPANGLER AND ASSOCIATES, LLC	VE EXPRESS REPORTING IGF::CT::IGF		\$83.00	\$83.00	2015	9/30/2015	20151SS10541140195	0	SMALL BUSINESS
SPECTRUM SERVICES PC	VE EXPRESS REPORTING IGF::CT::IGF		\$83.00	\$83.00	2015	9/30/2015	20151SS10541240015	0	SMALL BUSINESS
STEWART, WILLIAM	VE EXPRESS REPORTING IGF::CT::IGF		\$83.00	\$83.00	2015	9/30/2015	20151SS10541140457	0	SMALL BUSINESS
TAITZ, YAAKOV	VE EXPRESS REPORTING IGF::CT::IGF		\$83.00	\$83.00	2015	9/30/2015	20151SS10251220002	0	OTHER THAN SMALL BUSINESS
TOMMY LAFOSSE & ASSOCIATES INC	VE EXPRESS REPORTING IGF::CT::IGF		\$83.00	\$83.00	2015	9/30/2015	2015SS10781160075	0	SMALL BUSINESS
VOCATIONAL DYNAMICS LLC	VE EXPRESS REPORTING IGF::CT::IGF		\$83.00	\$83.00	2015	9/30/2015	20151SS11501110021	0	SMALL BUSINESS
VOCATIONAL REHABILITATION SPECIALISTS	VE EXPRESS REPORTING IGF::CT::IGF		\$83.00	\$83.00	2015	9/30/2015	20151SS10691170045	0	SMALL BUSINESS
VOCRESOURCES LLC	VE EXPRESS REPORTING IGF::CT::IGF		\$83.00	\$83.00	2015	9/30/2015	20151SS10381130271	0	SMALL BUSINESS
WILLIAM IRVIN	VE EXPRESS REPORTING IGF::CT::IGF		\$83.00	\$83.00	2015	9/30/2015	20151SS10541140307	0	SMALL BUSINESS
WORKING TOGETHER	VE EXPRESS REPORTING IGF::CT::IGF		\$83.00	\$83.00	2015	9/30/2015	20151SS10541140257	0	SMALL BUSINESS
YOUNGER, CYNTHIA A	VE EXPRESS REPORTING IGF::CT::IGF		\$83.00	\$83.00	2015	9/30/2015	20151SS10691170083	0	SMALL BUSINESS
ALICE D COX	ME EXPRESS REPORTING - MENTAL HEALTH IGF::CT::IGF		\$80.00	\$80.00	2015	9/30/2015	20151SS10781160014	0	SMALL BUSINESS
AMUSA, KWELI J MD, A PROFESSIONAL CORPORATION	ME EXPRESS REPORTING - MENTAL HEALTH IGF::CT::IGF		\$80.00	\$80.00	2015	9/30/2015	20151SS10781160046	0	SMALL BUSINESS
HORWITZ MD, JEFFREY A	ME EXPRESS REPORTING - MENTAL HEALTH IGF::CT::IGF		\$80.00	\$80.00	2015	9/30/2015	20151SS10631150068	0	SMALL BUSINESS
IRVIN S BELZER MD INC	ME EXPRESS REPORTING - MENTAL HEALTH IGF::CT::IGF		\$80.00	\$80.00	2015	9/30/2015	20151SS10881190116	0	SMALL BUSINESS
JAMES CLAIBORN PHD	ME EXPRESS REPORTING - MENTAL HEALTH IGF::CT::IGF		\$80.00	\$80.00	2015	9/30/2015	20151SS11501110010	0	SMALL BUSINESS
AKINS PHD, FAREN R	VE EXPRESS REPORTING IGF::CT::IGF		\$80.00	\$80.00	2015	9/30/2015	20151SS10881190012	0	SMALL BUSINESS
PSYCHOLOGICAL INSTITUTE, P.C.	VE EXPRESS REPORTING IGF::CT::IGF		\$80.00	\$80.00	2015	9/30/2015	20151SS11511180044	0	SMALL BUSINESS
CECILIA THOMAS MS CRC	VE EXPRESS REPORTING IGF::CT::IGF		\$79.35	\$79.35	2015	9/30/2015	20151SS10381130113	0	SMALL BUSINESS
NEUROLOGY CLINIC PC	ME EXPRESS REPORTING - MENTAL HEALTH IGF::CT::IGF		\$78.17	\$78.17	2015	9/30/2015	20151SS10541140158	0	SMALL BUSINESS
ZINSMEISTER PAULA	VE EXPRESS REPORTING IGF::CT::IGF		\$77.00	\$77.00	2015	9/30/2015	20151SS10631350033	0	SMALL BUSINESS
CHAPMAN, ILEANA T.	VE EXPRESS REPORTING IGF::CT::IGF		\$75.90	\$75.90	2015	9/30/2015	20151SS10541140235	0	SMALL BUSINESS
SARNO, JAMES D	VE EXPRESS REPORTING IGF::CT::IGF		\$75.90	\$75.90	2015	9/30/2015	20151SS11501110051	0	SMALL BUSINESS
MCFARLAND CONSULTING, LLC	ME EXPRESS REPORTING - MENTAL HEALTH IGF::CT::IGF		\$74.06	\$74.06	2015	9/30/2015	20151SS10631150221	0	SMALL BUSINESS
ALLEN, VALERIE	VE EXPRESS REPORTING IGF::CT::IGF		\$72.80	\$72.80	2015	9/30/2015	20151SS10541140635	0	SMALL BUSINESS
STEVE COSGROVE & ASSOCIATES	VE EXPRESS REPORTING IGF::CT::IGF		\$71.30	\$71.30	2015	9/30/2015	20151SS10541140303	0	SMALL BUSINESS
GROUP 5 CONSULTING	VE EXPRESS REPORTING IGF::CT::IGF		\$70.56	\$70.56	2015	9/30/2015	20151SS11521100039	0	SMALL BUSINESS

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TIME WARNER CABLE INC.	"IGF::OT::IGF" CABLE SERVICE THROUGHOUT THE DALLA	\$67.68	\$67.68	2016	9/7/2016	SS061650005		1	OTHER THAN SMALL BUSINESS
K & L DIVERSIFIED, LLC	VE EXPRESS REPORTING IGF::CT::IGF	\$67.20	\$67.20	2015	9/30/2015		20151	0	SMALL BUSINESS
WOOD, CHRISTOPHER K	VE EXPRESS REPORTING IGF::CT::IGF	\$67.20	\$67.20	2015	9/30/2015		20151	0	SMALL BUSINESS
DEBRA J HORTON	VE EXPRESS REPORTING IGF::CT::IGF	\$66.70	\$66.70	2015	9/30/2015		20151	0	SMALL BUSINESS
HOLLY BERQUIST CONSULTING INC	VE EXPRESS REPORTING IGF::CT::IGF	\$65.99	\$65.99	2015	9/30/2015		20151	0	SMALL BUSINESS
ADINA P LEVITON PHD CRC	VE EXPRESS REPORTING IGF::CT::IGF	\$64.16	\$64.16	2015	9/30/2015		20151	0	SMALL BUSINESS
DR TOM WAGNER	ME EXPRESS REPORTING - MENTAL HEALTH IGF::CT::IGF	\$63.25	\$63.25	2015	9/30/2015		20151	0	SMALL BUSINESS
BEADLES JR, ROBERT J	VE EXPRESS REPORTING IGF::CT::IGF	\$63.25	\$63.25	2015	9/30/2015		20151	0	SMALL BUSINESS
STEINBERG, HOWARD	VE EXPRESS REPORTING IGF::CT::IGF	\$60.95	\$60.95	2015	9/30/2015		20151	0	SMALL BUSINESS
MCDANIEL & ASSOCIATES	VE EXPRESS REPORTING IGF::CT::IGF	\$59.00	\$59.00	2015	9/30/2015		20151	0	SMALL BUSINESS
NIKONOVICH-KAHN, CHERYL	VE EXPRESS REPORTING IGF::CT::IGF	\$58.65	\$58.65	2015	9/30/2015		20151	0	SMALL BUSINESS
CHARLES POOR	VE EXPRESS REPORTING IGF::CT::IGF	\$55.00	\$55.00	2015	9/30/2015		20151	0	SMALL BUSINESS
FELDMAN, HELENE J.	VE EXPRESS REPORTING IGF::CT::IGF	\$55.00	\$55.00	2015	9/30/2015		20151	0	SMALL BUSINESS
GREGORY P BROWN MD PC	ME EXPRESS REPORTING - MENTAL HEALTH IGF::CT::IGF	\$50.00	\$50.00	2015	9/30/2015		2015	0	SMALL BUSINESS
GLOBAL CAREER CONSULTANTS, INCORPORATED	VE EXPRESS REPORTING IGF::CT::IGF	\$45.98	\$45.98	2015	9/30/2015		20151	0	SMALL BUSINESS
NEIL, THOMAS C.	ME EXPRESS REPORTING - MENTAL HEALTH IGF::CT::IGF	\$44.00	\$44.00	2015	9/30/2015		20151	0	SMALL BUSINESS
ROBERT J NEUMAN	ME EXPRESS REPORTING - MENTAL HEALTH IGF::CT::IGF	\$44.00	\$44.00	2015	9/30/2015		20151	0	SMALL BUSINESS
BREWER, EARNEST W	VE EXPRESS REPORTING IGF::CT::IGF	\$44.00	\$44.00	2015	9/30/2015		20151	0	SMALL BUSINESS
BYRON PETTINGILL	VE EXPRESS REPORTING IGF::CT::IGF	\$44.00	\$44.00	2015	9/30/2015		20151	0	SMALL BUSINESS
CUMMINGS, ALAN E.	VE EXPRESS REPORTING IGF::CT::IGF	\$44.00	\$44.00	2015	9/30/2015		20151	0	OTHER THAN SMALL BUSINESS
DUTTON LAMBERT CONSULTING, LLC	VE EXPRESS REPORTING IGF::CT::IGF	\$44.00	\$44.00	2015	9/30/2015		20151	0	SMALL BUSINESS
FRED A MONACO PHD	VE EXPRESS REPORTING IGF::CT::IGF	\$44.00	\$44.00	2015	9/30/2015		20151	0	SMALL BUSINESS
GREENBERG, JOEL	VE EXPRESS REPORTING IGF::CT::IGF	\$44.00	\$44.00	2015	9/30/2015		20151	0	SMALL BUSINESS
LINVILL ASSOCIATES	VE EXPRESS REPORTING IGF::CT::IGF	\$44.00	\$44.00	2015	9/30/2015		20151	0	SMALL BUSINESS
MITCHELL A SCHMIDT	VE EXPRESS REPORTING IGF::CT::IGF	\$44.00	\$44.00	2015	9/30/2015		20151	0	SMALL BUSINESS
WRIGHT, TEENYSON J PHD P A	VE EXPRESS REPORTING IGF::CT::IGF	\$44.00	\$44.00	2015	9/30/2015		20151	0	SMALL BUSINESS
JAMES E LANIER	VE EXPRESS REPORTING IGF::CT::IGF	\$39.00	\$39.00	2015	9/30/2015		20151	0	SMALL BUSINESS
MC ALPINE, KATHLEEN	VE EXPRESS REPORTING IGF::CT::IGF	\$38.00	\$38.00	2015	9/30/2015		20151	0	SMALL BUSINESS
TRACY H YOUNG	VE EXPRESS REPORTING IGF::CT::IGF	\$38.00	\$38.00	2015	9/30/2015		20151	0	SMALL BUSINESS
COSGROVE, COLEMAN K	VE EXPRESS REPORTING IGF::CT::IGF	\$33.26	\$33.26	2015	9/30/2015		20151	0	SMALL BUSINESS
MARK LEAPTROT	VE EXPRESS REPORTING IGF::CT::IGF	\$22.86	\$22.86	2015	9/30/2015		20151	0	SMALL BUSINESS
ELLIS VOCATIONAL EVALUATION SERVICES IN	VE EXPRESS REPORTING IGF::CT::IGF	\$19.70	\$19.70	2015	9/30/2015		20151	0	SMALL BUSINESS
SEIFERT, LARRY	VE EXPRESS REPORTING IGF::CT::IGF	\$19.19	\$19.19	2015	9/30/2015		20151	0	SMALL BUSINESS
MED-VOC SOLUTIONS	VE EXPRESS REPORTING IGF::CT::IGF	\$16.40	\$16.40	2015	9/30/2015		20151	0	SMALL BUSINESS
ASCENDANT CONSULTING, INC.	VE EXPRESS REPORTING IGF::CT::IGF	\$16.20	\$16.20	2015	9/30/2015		20151	0	SMALL BUSINESS
ANTHONY VINCENT MELANSON	VE EXPRESS REPORTING IGF::CT::IGF	\$5.40	\$5.40	2015	9/30/2015		20151	0	SMALL BUSINESS
EUTO, DR JEWEL	VE EXPRESS REPORTING IGF::CT::IGF	\$4.35	\$4.35	2015	9/30/2015		20151	0	SMALL BUSINESS
BRAMLETT & ASSOCIATES	VE EXPRESS REPORTING IGF::CT::IGF	\$3.48	\$3.48	2015	9/30/2015		20151	0	SMALL BUSINESS
GREEN, WILLIAM F	VE EXPRESS REPORTING IGF::CT::IGF	\$2.30	\$2.30	2015	9/30/2015		20151	0	SMALL BUSINESS
MCKINNEY, JOHN W III CRC CVE CCA	VE EXPRESS REPORTING IGF::CT::IGF	\$2.25	\$2.25	2015	9/30/2015		20151	0	SMALL BUSINESS
INTERNATIONAL BUSINESS MACHINES CORPORATION	ACQUIRE MAINFRAME INFRASTRUCTURE HARDWARE FO	\$0.00	\$0.00	2016	8/4/2016	SS001630478		1	OTHER THAN SMALL BUSINESS
PITNEY BOWES GLOBAL FINANCIAL SERVICES LLC	ADD A MACHINE TO CONTRACT AND MERGE CLINS 0007	\$0.00	\$0.00	2016	12/8/2015	SS001360018		5	OTHER THAN SMALL BUSINESS
SOLAR TURBINES INCORPORATED	ADD AS CLAUSE 2352.204-2	\$0.00	\$0.00	2016	3/21/2016	SS000760043		22	OTHER THAN SMALL BUSINESS
ALLIED HEALTH CARE SERVICES	ADMIN MOD TO CHANGE ACCOUNTING DATA.	\$0.00	\$0.00	2015	8/7/2015	SS000860128		32	OTHER THAN SMALL BUSINESS
HELP/SYSTEMS, LLC	ADMINISTRATIVE MODIFICATION FOR HELP/SYSTEMS M	\$0.00	\$0.00	2016	12/1/2015	SS001650015		1	OTHER THAN SMALL BUSINESS
HELP/SYSTEMS, LLC	ADMINISTRATIVE MODIFICATION FOR HELP/SYSTEMS M	\$0.00	\$0.00	2016	12/7/2015	SS001650015		2	OTHER THAN SMALL BUSINESS
NATIONAL ACADEMY OF SCIENCES	ADMINISTRATIVE MODIFICATION TO CORRECT DELIVERABLE SCHEDULE ERROR IN NAS/IOM TASK ORDER 0006. IGF::OT::IGF	\$0.00	\$0.00	2016	10/6/2015		6	1	OTHER THAN SMALL BUSINESS
HERMAN MILLER, INC.	B926 KITSAP/SILVERDALE, WA - DESIGN SERVICES, INSTA	\$0.00	\$0.00	2015	3/30/2015	SS001530039	SS001260003	1	OTHER THAN SMALL BUSINESS
BAMBOO SOLUTIONS CORP	BAMBOO SOFTWARE SOFTWARE AND MAINTENANCE EN	\$39,889.00	\$0.00	2015	6/30/2015	SS001260080		3	OTHER THAN SMALL BUSINESS
BAMBOO SOLUTIONS CORP	BAMBOO SOFTWARE SOFTWARE AND MAINTENANCE EN	\$39,889.00	\$0.00	2016	5/6/2016	SS001260080		4	OTHER THAN SMALL BUSINESS
HERMAN MILLER, INC.	BARRIER WALL AT PERMANENT WORKSTATION PROJECT	\$0.00	\$0.00	2016	9/13/2016	SS001231189	SS001260003	3	OTHER THAN SMALL BUSINESS
HERMAN MILLER, INC.	BARRIER WALL PROJECTS - SYSTEMS FURNITURE - FOR BI	\$0.00	\$0.00	2016	9/13/2016	SS001432042	SS001260003	2	OTHER THAN SMALL BUSINESS
HERMAN MILLER, INC.	BARRIER WALL PROJECTS - SYSTEMS FURNITURE - FOR BI	\$0.00	\$0.00	2015	9/24/2015	SS001432042	SS001260003	1	OTHER THAN SMALL BUSINESS
HERMAN MILLER, INC.	BARRIER WALL PROJECTS - SYSTEMS FURNITURE - TERRIT	\$0.00	\$0.00	2016	9/13/2016	SS001432043	SS001260003	2	OTHER THAN SMALL BUSINESS
HERMAN MILLER, INC.	BARRIER WALL PROJECTS - SYSTEMS FURNITURE - TERRIT	\$0.00	\$0.00	2015	9/22/2015	SS001432043	SS001260003	1	OTHER THAN SMALL BUSINESS



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HOLLINGSWORTH, SHAW	BLANKET PURCHASE AGREEMENT FOR VERBATIM HEARING RECORDINGS FOR THE OFFICE OF DISABILITY ADJUDICATION AND REVIEW. THE PURPOSE OF MODIFICATION NUMBER 3 IS TO EXTEND THE BPA THROUGH NOVEMBER 30, 2016 AND UPDATE VARIOUS BPA CLAUSES.	\$0.00	\$0.00	2015	6/30/2015	SS040940008		3	SMALL BUSINESS
BMJ PUBLISHING GROUP LTD	BMJ CLINICAL EVIDENCE EXERCISE OPTION YEAR 1 FOR T	\$6,295.00	\$0.00	2015	7/1/2015	SS001451140		2	OTHER THAN SMALL BUSINESS
RUMSEY ELECTRIC COMPANY	BREAKER LIFT TRUCK DELIVERY EXTENDED.	\$0.00	\$0.00	2015	5/27/2015	SS001451152		1	SMALL BUSINESS
BROWN, ROY C	BROWN, MC, REG. 10 IGF::CL::IGF CLOSELY ASSOCIATED	\$0.00	\$0.00	2016	2/8/2016		1 SS10154C001	1	SMALL BUSINESS
RICHMOND, CITY OF	BUILDING SANITARY SEWER/STORM FEES IGF::CT::IGF	\$0.00	\$0.00	2015	7/8/2015	SS091551004		1	OTHER THAN SMALL BUSINESS
RICHMOND, CITY OF	BUILDING SANITARY SEWER/STORM FEES IGF::CT::IGF	\$0.00	\$0.00	2015	8/21/2015	SS091551004		2	OTHER THAN SMALL BUSINESS
ADMIRAL ELEVATOR COMPANY, INC.	CARPET TILE INSTALLATION AND REMOVAL SERVICES MODIFICATION TO EXERCISE OPTION TO EXTEND SERVICES	\$0.00	\$0.00	2015	4/13/2015	SS001060042		14	SMALL BUSINESS
DALLAS LIGHTHOUSE FOR THE BLIND, INC.	CHANGE CONTRACTING OFFICER REPRESENTATIVE	\$0.00	\$0.00	2015	1/13/2015	SS061060013		13	SMALL BUSINESS
SOLAR TURBINES INCORPORATED	CHANGE POINT OF CONTACT	\$0.00	\$0.00	2016	3/7/2016	SS000760043		21	OTHER THAN SMALL BUSINESS
HERMAN MILLER, INC.	CHARLOTTE, NC ODAR #RT27 DESIGN, INSTALLATION, O	\$0.00	\$0.00	2016	11/17/2015	SS001530077	SS001260003	2	OTHER THAN SMALL BUSINESS
HERMAN MILLER, INC.	CHICAGO, IL ODAR #AX26 THE OFFICE IS ADDING 7 NEW	\$0.00	\$0.00	2016	3/23/2016	SS001530452	SS001260003	1	OTHER THAN SMALL BUSINESS
HERMAN MILLER, INC.	CONCORD, NC #C344 DESIGN, INSTALLATION AND PROD	\$0.00	\$0.00	2015	6/19/2015	SS001431663	SS001260003	1	OTHER THAN SMALL BUSINESS
NATIONAL ACADEMY OF SCIENCES	CONSENSUS STUDIES TO ASSIST SSA WITH DISABILITY ISSUES IGF::OT::IGF	\$0.00	\$0.00	2015	9/18/2015	SS001360048		4	OTHER THAN SMALL BUSINESS
NATIONAL ACADEMY OF SCIENCES	CONSENSUS STUDY COMMITTEE TO EVALUATE PSYCHOLOGICAL TESTING - MODIFICATION TO CLARIFY "RECOMMENDATIONS" REQUIREMENT IGF::OT::IGF	\$0.00	\$0.00	2015	5/19/2015		4 SS001360048	3	OTHER THAN SMALL BUSINESS
NATIONAL ACADEMY OF SCIENCES	CONSENSUS STUDY COMMITTEE TO EVALUATE PSYCHOLOGICAL TESTING - MODIFICATION TO LESSEN QUALIFICATIONS REQUIREMENT FOR COMMITTEE MEMBERS IGF::OT::IGF	\$0.00	\$0.00	2015	1/9/2015		4 SS001360048	2	OTHER THAN SMALL BUSINESS
SPARTAN ENGINEERING, INC.	CRITIAL FUNCTION FIRE ALARM TESTING - EXERCISE OPTION YEAR FOUR - APRIL 1, 2016 TO MARCH 31, 2017. IGF::CT::IGF	\$10,017.00	\$0.00	2016	1/27/2016	SS091251009		4	SMALL BUSINESS
SPARTAN ENGINEERING, INC.	CRITIAL FUNCTION FIRE ALARM TESTING - EXERCISE OPTION YEAR THREE - APRIL 1, 2015 TO MARCH 31, 2016. IGF::CT::IGF	\$9,106.00	\$0.00	2015	2/27/2015	SS091251009		3	SMALL BUSINESS
HEALTH MENTAL HYGIENE MD DEPT	DCOSS - ENUMERATION AT BIRTH (EAB) - MARYLAND	\$0.00	\$0.00	2015	12/2/2014	SS000860037		6	OTHER THAN SMALL BUSINESS
HEALTH AND WELFARE IDAHO DEPARTMENT OF	DCOSS-ENUMERATION AT BIRTH (EAB) CONTRACTS - IDA	\$0.00	\$0.00	2015	12/1/2014	SS000860029		7	OTHER THAN SMALL BUSINESS
HEALTH AND HOSPITALS LOUISIANA DEPARTMENT OF	DCOSS-ENUMERATION AT BIRTH (EAB) LOUISIANA	\$0.00	\$0.00	2015	12/1/2014	SS000860035		6	OTHER THAN SMALL BUSINESS
HEALTH AND HUMAN RESOURCES WEST VIRGINIA DEPARTMENT OF (0771)	DCOSS-STATE DEATH MATCH-NON-EDR CONTRACTS	\$0.00	\$0.00	2016	8/26/2016	SS000660056		5	OTHER THAN SMALL BUSINESS
POTOMAC EDISON COMPANY, THE	DELIVERY ORDER AGAINST GSA CONTRACT NUMBER GS-	\$0.00	\$0.00	2016	5/26/2016	SS001530732	GS00P08BSD0539	2	OTHER THAN SMALL BUSINESS
DLT SOLUTIONS INCORPORATED	DELL WINDOWS MANAGEMENT AND QUEST ENTERPRISE	\$0.00	\$0.00	2016	5/6/2016	SS001530527	W91QUZ06A0004	3	SMALL BUSINESS
DINO SOFTWARE CORPORATION	DINO T-REX SOFTWARE MAINTENANCE. THE PURPOSE C	\$463,010.69	\$0.00	2016	7/29/2016	SS001550208		1	SMALL BUSINESS
DLT SOLUTIONS INCORPORATED	DISSAO CURRENTLY UTILIZES THE DELL CHANGEAUDITOR	\$0.00	\$0.00	2015	6/3/2015	SS001530527	W91QUZ06A0004	1	SMALL BUSINESS
HERMAN MILLER, INC.	DURHAM, NC #R328 RELOCATION - DESIGN, INSTALLATI	\$0.00	\$0.00	2016	6/16/2016	SS001530708	SS001260003	1	OTHER THAN SMALL BUSINESS

Sole Source Contracts  
(December 1, 2014 - December 1, 2016)

Vendor Name	Description of Requirement	Action Obligation	Base and All Options Value	Fiscal Year	Date Signed	PO/Delivery Order/Task Order/Call#	Parent Contract	Mod #	Contracting Officers Business Size Selection
HEALTH AND HOSPITALS, LOUISIANA DEPARTMENT OF	ELECTRONIC DEATH RECORDS (EDR) - LOUISIANA. THE PURPOSE OF MODIFICATION NUMBER 5 IS TO EXERCISE OPTION YEAR THREE TO EXTEND THE TERM OF THE CONTRACT FROM JANUARY 1, 2015 THROUGH DECEMBER 31, 2015 FOR RECEIPT OF ELECTRONIC DEATH RECORDS.	\$0.00	\$0.00	2015	12/2/2014	SS001260062		5	OTHER THAN SMALL BUSINESS
HEALTH DEPARTMENT, OKLAHOMA STATE	ELECTRONIC DEATH RECORDS (EDR) FOR THE STATE OF OKLAHOMA	\$0.00	\$0.00	2015	12/2/2014	SS001260045		5	OTHER THAN SMALL BUSINESS
HEALTH AND SOCIAL SERVICES, ALASKA DEPARTMENT OF	ELECTRONIC DEATH REGISTRATION - ALASKA - THE PURPOSE OF MODIFICATION NUMBER 4 IS TO EXERCISE OPTION YEAR THREE TO EXTEND THE TERM OF THE CONTRACT FROM JANUARY 1, 2015 THROUGH DECEMBER 31, 2015 FOR RECEIPT OF DEATH RECORDS.	\$0.00	\$0.00	2015	12/11/2014	SS001260013		4	OTHER THAN SMALL BUSINESS
PUBLIC HEALTH, ALABAMA DEPARTMENT OF	ELECTRONIC DEATH REGISTRATION - ALABAMA THE PURPOSE OF MODIFICATION NUMBER 4 IS TO EXERCISE OPTION YEAR THREE TO EXTEND THE TERM OF THE CONTRACT FROM JANUARY 1, 2015 THROUGH DECEMBER 31, 2015 FOR RECEIPT OF ELECTRONIC DEATH RECORDS.	\$0.00	\$0.00	2015	12/8/2014	SS001260012		4	OTHER THAN SMALL BUSINESS
HEALTH AND SOCIAL SERVICES, ALASKA DEPARTMENT OF	ELECTRONIC DEATH REGISTRATION ALASKA THE PURPOSE OF MODIFICATION NUMBER 5 IS TO EXERCISE OPTION YEAR IV TO EXTEND THE TERM OF THE CONTRACT FROM JANUARY 1, 2016 THROUGH DECEMBER 31, 2016 FOR RECEIPT OF ELECTRONIC DEATH RECORDS.	\$0.00	\$0.00	2016	12/2/2015	SS001260013		5	OTHER THAN SMALL BUSINESS
ARKANSAS DEPARTMENT OF HEALTH	ELECTRONIC DEATH REGISTRATION - ARKANSAS THE PURPOSE OF MODIFICATION NUMBER 4 IS TO EXERCISE OPTION YEAR THREE TO EXTEND THE TERM OF THE CONTRACT FROM JANUARY 1, 2015 THROUGH DECEMBER 31, 2015 FOR RECEIPT OF ELECTRONIC DEATH RECORDS.	\$0.00	\$0.00	2015	12/4/2014	SS001260015		4	OTHER THAN SMALL BUSINESS
ARKANSAS DEPARTMENT OF HEALTH	ELECTRONIC DEATH REGISTRATION ARKANSAS THE PURPOSE OF MODIFICATION NUMBER 5 IS TO EXERCISE OPTION YEAR IV TO EXTEND THE TERM OF THE CONTRACT FROM JANUARY 1, 2016 THROUGH DECEMBER 31, 2016 FOR RECEIPT OF ELECTRONIC DEATH RECORDS.	\$0.00	\$0.00	2016	12/2/2015	SS001260015		5	OTHER THAN SMALL BUSINESS
PUBLIC HEALTH, CALIFORNIA DEPARTMENT OF	ELECTRONIC DEATH REGISTRATION CALIFORNIA THE PURPOSE OF MODIFICATION NUMBER 6 IS TO ISSUE A CHANGE TO THE STATEMENT OF WORK REGARDING SSA'S VERIFICATION PROCESS.	\$0.00	\$0.00	2016	5/18/2016	SS001260007		6	OTHER THAN SMALL BUSINESS
PUBLIC HEALTH AND ENVIRONMENT, COLORADO DEPARTMENT OF	ELECTRONIC DEATH REGISTRATION COLORADO THE PURPOSE OF MODIFICATION NUMBER 5 IS TO EXERCISE OPTION YEAR IV TO EXTEND THE TERM OF THE CONTRACT FROM JANUARY 1, 2016 THROUGH DECEMBER 31, 2016 FOR RECEIPT OF ELECTRONIC DEATH RECORDS.	\$0.00	\$0.00	2016	12/7/2015	SS001260016		5	OTHER THAN SMALL BUSINESS
PUBLIC HEALTH, CONNECTICUT DEPARTMENT OF	ELECTRONIC DEATH REGISTRATION CONNECTICUT THE PURPOSE OF MODIFICATION NUMBER 5 IS TO EXERCISE OPTION YEAR IV TO EXTEND THE TERM OF THE CONTRACT FROM JANUARY 1, 2016 THROUGH DECEMBER 31, 2016 FOR RECEIPT OF ELECTRONIC DEATH RECORDS.	\$0.00	\$0.00	2016	12/7/2015	SS001260017		5	OTHER THAN SMALL BUSINESS
EXECUTIVE OFFICE OF THE GOVERNOR OF DELAWARE	ELECTRONIC DEATH REGISTRATION - DELAWARE THE PURPOSE OF MODIFICATION NUMBER 5 IS TO EXERCISE OPTION YEAR THREE TO EXTEND THE TERM OF THE CONTRACT FROM JANUARY 1, 2015 THROUGH DECEMBER 31, 2015 FOR RECEIPT OF ELECTRONIC DEATH RECORDS.	\$0.00	\$0.00	2015	12/16/2014	SS001260018		5	OTHER THAN SMALL BUSINESS

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Vendor Name	Description of Requirement	Action Obligation	Base and All Options Value	Fiscal Year	Date Signed	PO/Delivery Order/Task Order/Call#	Parent Contract	Mod #	Contracting Officers Business Size Selection
DISTRICT OF COLUMBIA, GOVERNMENT OF	ELECTRONIC DEATH REGISTRATION - DISTRICT OF COLUMBIA	\$0.00	\$0.00	2015	12/30/2014	SS001260019		5	OTHER THAN SMALL BUSINESS
GEORGIA, DEPARTMENT OF PUBLIC HEALTH	ELECTRONIC DEATH REGISTRATION - GEORGIA	\$0.00	\$0.00	2015	12/15/2014	SS001260021		4	OTHER THAN SMALL BUSINESS
HEALTH, HAWAII DEPARTMENT OF	ELECTRONIC DEATH REGISTRATION - HAWAII THE PURPOSE OF MODIFICATION NUMBER 4 IS TO EXERCISE OPTION YEAR THREE TO EXTEND THE TERM OF THE CONTRACT FROM JANUARY 1, 2015 THROUGH DECEMBER 31, 2015 FOR RECEIPT OF ELECTRONIC DEATH RECORDS.	\$0.00	\$0.00	2015	12/9/2014	SS001260011		4	OTHER THAN SMALL BUSINESS
HEALTH, HAWAII DEPARTMENT OF	ELECTRONIC DEATH REGISTRATION - HAWAII THE PURPOSE OF MODIFICATION NUMBER 5 IS TO EXERCISE OPTION YEAR IV TO EXTEND THE TERM OF THE CONTRACT FROM JANUARY 1, 2016 THROUGH DECEMBER 31, 2016 FOR RECEIPT OF ELECTRONIC DEATH RECORDS.	\$0.00	\$0.00	2016	12/9/2015	SS001260011		5	OTHER THAN SMALL BUSINESS
HEALTH AND WELFARE, IDAHO DEPARTMENT OF	ELECTRONIC DEATH REGISTRATION - IDAHO THE PURPOSE OF MODIFICATION NUMBER 4 IS TO EXERCISE OPTION YEAR THREE TO EXTEND THE TERM OF THE CONTRACT FROM JANUARY 1, 2015 THROUGH DECEMBER 31, 2015 FOR RECEIPT OF ELECTRONIC DEATH RECORDS.	\$0.00	\$0.00	2015	12/11/2014	SS001260034		4	OTHER THAN SMALL BUSINESS
HEALTH AND WELFARE, IDAHO DEPARTMENT OF	ELECTRONIC DEATH REGISTRATION - IDAHO THE PURPOSE OF MODIFICATION NUMBER 5 IS TO EXERCISE OPTION YEAR IV TO EXTEND THE TERM OF THE CONTRACT FROM JANUARY 1, 2016 THROUGH DECEMBER 31, 2016 FOR RECEIPT OF ELECTRONIC DEATH RECORDS.	\$0.00	\$0.00	2016	12/3/2015	SS001260034		5	OTHER THAN SMALL BUSINESS
CHFS-DEPARTMENT FOR COMMUNITY BASED SERVICES	ELECTRONIC DEATH REGISTRATION - KENTUCKY THE PURPOSE OF MODIFICATION NUMBER 5 IS TO EXERCISE OPTION YEAR THREE TO EXTEND THE TERM OF THE CONTRACT FROM JANUARY 1, 2015 THROUGH DECEMBER 31, 2015 FOR RECEIPT OF ELECTRONIC DEATH RECORDS.	\$0.00	\$0.00	2015	12/4/2014	SS001260039		5	OTHER THAN SMALL BUSINESS
CHFS-DEPARTMENT FOR COMMUNITY BASED SERVICES	ELECTRONIC DEATH REGISTRATION - KENTUCKY THE PURPOSE OF MODIFICATION NUMBER 6 IS TO EXERCISE OPTION YEAR IV TO EXTEND THE TERM OF THE CONTRACT FROM JANUARY 1, 2016 THROUGH DECEMBER 31, 2016 FOR RECEIPT OF ELECTRONIC DEATH RECORDS.	\$0.00	\$0.00	2016	12/3/2015	SS001260039		6	OTHER THAN SMALL BUSINESS
HEALTH MENTAL HYGIENE MD DEPT	ELECTRONIC DEATH REGISTRATION - MARYLAND. THE PURPOSE OF MODIFICATION NUMBER 5 IS TO EXERCISE OPTION YEAR THREE TO EXTEND THE TERM OF THE CONTRACT FROM JANUARY 1, 2015 THROUGH DECEMBER 31, 2015 FOR RECEIPT OF ELECTRONIC DEATH RECORDS.	\$0.00	\$0.00	2016	12/7/2015	SS001260061		5	OTHER THAN SMALL BUSINESS
HEALTH MENTAL HYGIENE MD DEPT	ELECTRONIC DEATH REGISTRATION - MARYLAND. THE PURPOSE OF MODIFICATION NUMBER 6 IS TO EXERCISE OPTION YEAR IV TO EXTEND THE TERM OF THE CONTRACT FROM JANUARY 1, 2016 THROUGH DECEMBER 31, 2016 FOR RECEIPT OF ELECTRONIC DEATH RECORDS.	\$0.00	\$0.00	2015	12/4/2014	SS001260061		4	OTHER THAN SMALL BUSINESS
PUBLIC HEALTH, MASSACHUSETTS DEPT OF	ELECTRONIC DEATH REGISTRATION - MASSACHUSETTS THE PURPOSE OF MODIFICATION NUMBER 5 IS TO EXERCISE OPTION YEAR IV TO EXTEND THE TERM OF THE CONTRACT FROM JANUARY 1, 2016 THROUGH DECEMBER 31, 2016 FOR RECEIPT OF ELECTRONIC DEATH RECORDS.	\$0.00	\$0.00	2016	12/3/2015	SS001260053		5	OTHER THAN SMALL BUSINESS
COMMUNITY HEALTH, MICHIGAN DEPARTMENT OF	ELECTRONIC DEATH REGISTRATION - MICHIGAN THE PURPOSE OF MODIFICATION NUMBER 4 IS TO EXERCISE OPTION YEAR THREE TO EXTEND THE TERM OF THE CONTRACT FROM JANUARY 1, 2015 THROUGH DECEMBER 31, 2015 FOR RECEIPT OF ELECTRONIC DEATH RECORDS.	\$0.00	\$0.00	2015	12/8/2014	SS001260052		4	OTHER THAN SMALL BUSINESS
COMMUNITY HEALTH, MICHIGAN DEPARTMENT OF	ELECTRONIC DEATH REGISTRATION - MICHIGAN THE PURPOSE OF MODIFICATION NUMBER 5 IS TO EXERCISE OPTION YEAR IV TO EXTEND THE TERM OF THE CONTRACT FROM JANUARY 1, 2016 THROUGH DECEMBER 31, 2016 FOR RECEIPT OF ELECTRONIC DEATH RECORDS.	\$0.00	\$0.00	2016	12/3/2015	SS001260052		5	OTHER THAN SMALL BUSINESS



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Vendor Name	Description of Requirement	Action Obligation	Base and All Options Value	Fiscal Year	Date Signed	PO/Delivery Order/Task Order/Call#	Parent Contract	Mod #	Contracting Officers Business Size Selection
PUBLIC HEALTH AND HUMAN SERVICES, MONTANA DEPARTMENT OF	ELECTRONIC DEATH REGISTRATION - MONTANA THE PURPOSE OF MODIFICATION NUMBER 4 IS TO EXERCISE OPTION YEAR THREE TO EXTEND THE TERM OF THE CONTRACT FROM JANUARY 1, 2015 THROUGH DECEMBER 31, 2015 FOR RECEIPT OF ELECTRONIC DEATH RECORDS.	\$0.00	\$0.00	2015	12/10/2014	SS001260027		4	OTHER THAN SMALL BUSINESS
PUBLIC HEALTH AND HUMAN SERVICES, MONTANA DEPARTMENT OF	ELECTRONIC DEATH REGISTRATION MONTANA THE PURPOSE OF MODIFICATION NUMBER 5 IS TO EXERCISE OPTION YEAR IV TO EXTEND THE TERM OF THE CONTRACT FROM JANUARY 1, 2016 THROUGH DECEMBER 31, 2016 FOR RECEIPT OF ELECTRONIC DEATH RECORDS.	\$0.00	\$0.00	2016	12/7/2015	SS001260027		5	OTHER THAN SMALL BUSINESS
HEALTH AND HUMAN SERVICES, NEBRASKA DEPARTMENT OF	ELECTRONIC DEATH REGISTRATION NEBRASKA THE PURPOSE OF MODIFICATION NUMBER 5 IS TO EXERCISE OPTION YEAR IV TO EXTEND THE TERM OF THE CONTRACT FROM JANUARY 1, 2016 THROUGH DECEMBER 31, 2016 FOR RECEIPT OF ELECTRONIC DEATH RECORDS.	\$0.00	\$0.00	2016	12/3/2015	SS001260028		5	OTHER THAN SMALL BUSINESS
HEALTH AND HUMAN SERVICES, NEBRASKA DEPARTMENT OF	ELECTRONIC DEATH REGISTRATION - NEBRASKA. THE PU	\$0.00	\$0.00	2015	12/9/2014	SS001260028		4	OTHER THAN SMALL BUSINESS
HEALTH AND HUMAN SERVICES, NEVADA DEPARTMENT OF	ELECTRONIC DEATH REGISTRATION - NEVADA THE PURPOSE OF MODIFICATION NUMBER 4 IS TO EXERCISE OPTION YEAR THREE TO EXTEND THE TERM OF THE CONTRACT FROM JANUARY 1, 2015 THROUGH DECEMBER 31, 2015 FOR RECEIPT OF ELECTRONIC DEATH RECORDS.	\$0.00	\$0.00	2015	12/2/2014	SS001260029		4	OTHER THAN SMALL BUSINESS
HEALTH AND HUMAN SERVICES, NEVADA DEPARTMENT OF	ELECTRONIC DEATH REGISTRATION NEVADA THE PURPOSE OF MODIFICATION NUMBER 5 IS TO EXERCISE OPTION YEAR IV TO EXTEND THE TERM OF THE CONTRACT FROM JANUARY 1, 2016 THROUGH DECEMBER 31, 2016 FOR RECEIPT OF ELECTRONIC DEATH RECORDS.	\$0.00	\$0.00	2016	12/3/2015	SS001260029		5	OTHER THAN SMALL BUSINESS
SECRETARY STATE, NEW HAMPSHIRE DEPT OF	ELECTRONIC DEATH REGISTRATION NEW HAMPSHIRE THE PURPOSE OF MODIFICATION NUMBER 5 IS TO EXERCISE OPTION YEAR IV TO EXTEND THE TERM OF THE CONTRACT FROM JANUARY 1, 2016 THROUGH DECEMBER 31, 2016 FOR RECEIPT OF ELECTRONIC DEATH RECORDS.	\$0.00	\$0.00	2016	12/3/2015	SS001260030		5	OTHER THAN SMALL BUSINESS
SECRETARY STATE, NEW HAMPSHIRE DEPT OF	ELECTRONIC DEATH REGISTRATION - NEW HAMPSHIRE.	\$0.00	\$0.00	2015	12/11/2014	SS001260030		4	OTHER THAN SMALL BUSINESS
HEALTH, NEW MEXICO DEPARTMENT OF	ELECTRONIC DEATH REGISTRATION - NEW MEXICO THE PURPOSE OF MODIFICATION NUMBER 4 IS TO EXERCISE OPTION YEAR THREE TO EXTEND THE TERM OF THE CONTRACT FROM JANUARY 1, 2015 THROUGH DECEMBER 31, 2015 FOR RECEIPT OF ELECTRONIC DEATH RECORDS.	\$0.00	\$0.00	2015	12/30/2014	SS001260032		4	OTHER THAN SMALL BUSINESS
HEALTH, NEW MEXICO DEPARTMENT OF	ELECTRONIC DEATH REGISTRATION NEW MEXICO THE PURPOSE OF MODIFICATION NUMBER 5 IS TO EXERCISE OPTION YEAR IV TO EXTEND THE TERM OF THE CONTRACT FROM JANUARY 1, 2016 THROUGH DECEMBER 31, 2016 FOR RECEIPT OF ELECTRONIC DEATH RECORDS.	\$0.00	\$0.00	2016	12/30/2015	SS001260032		5	OTHER THAN SMALL BUSINESS
HEALTH, NEW MEXICO DEPARTMENT OF	ELECTRONIC DEATH REGISTRATION NEW MEXICO THE PURPOSE OF MODIFICATION NUMBER 6 IS TO ISSUE A CHANGE TO THE STATEMENT OF WORK REGARDING SSA'S VERIFICATION PROCESS.	\$0.00	\$0.00	2016	1/27/2016	SS001260032		6	OTHER THAN SMALL BUSINESS
PUBLIC HEALTH SOLUTIONS	ELECTRONIC DEATH REGISTRATION - NEW YORK CITY. TH	\$0.00	\$0.00	2015	12/17/2014	SS001260033		4	OTHER THAN SMALL BUSINESS
HEALTH & HUMAN SERVICES, NORTH CAROLINA DEPARTMENT OF	ELECTRONIC DEATH REGISTRATION - NORTH CAROLINA THE PURPOSE OF MODIFICATION NUMBER 5 IS TO INCORPORATE AN INVOICE PROCESS CHANGE.	\$0.00	\$0.00	2015	2/23/2015	SS001260049		5	OTHER THAN SMALL BUSINESS

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Vendor Name	Description of Requirement	Action Obligation	Base and All Options Value	Fiscal Year	Date Signed	PO/Delivery Order/Task Order/Call#	Parent Contract	Mod #	Contracting Officers Business Size Selection
HEALTH, NORTH DAKOTA DEPARTMENT OF	ELECTRONIC DEATH REGISTRATION - NORTH DAKOTA THE PURPOSE OF MODIFICATION NUMBER 5 IS TO INCORPORATE AN INVOICE PROCESS CHANGE.	\$0.00	\$0.00	2015	1/27/2015	SS001260046		5	OTHER THAN SMALL BUSINESS
DEPARTMENT OF HEALTH OHIO	ELECTRONIC DEATH REGISTRATION OHIO THE PURPOSE OF MODIFICATION NUMBER 6 IS TO ISSUE A CHANGE TO THE STATEMENT OF WORK REGARDING SSA'S VERIFICATION PROCESS.	\$0.00	\$0.00	2016	9/16/2016	SS001260047		6	OTHER THAN SMALL BUSINESS
HEALTH DEPARTMENT, OKLAHOMA STATE	ELECTRONIC DEATH REGISTRATION OKLAHOMA THE PURPOSE OF MODIFICATION NUMBER 6 IS TO EXERCISE OPTION YEAR IV TO EXTEND THE TERM OF THE CONTRACT FROM JANUARY 1, 2016 THROUGH DECEMBER 31, 2016 FOR RECEIPT OF ELECTRONIC DEATH RECORDS.	\$0.00	\$0.00	2016	12/3/2015	SS001260045		6	OTHER THAN SMALL BUSINESS
HUMAN SERVICES, OREGON DEPARTMENT OF	ELECTRONIC DEATH REGISTRATION OREGON THE PURPOSE OF MODIFICATION NUMBER 5 IS TO EXERCISE OPTION YEAR IV TO EXTEND THE TERM OF THE CONTRACT FROM JANUARY 1, 2016 THROUGH DECEMBER 31, 2016 FOR RECEIPT OF ELECTRONIC DEATH RECORDS.	\$0.00	\$0.00	2016	12/7/2015	SS001260042		5	OTHER THAN SMALL BUSINESS
HEALTH, PENNSYLVANIA DEPARTMENT OF	ELECTRONIC DEATH REGISTRATION - PENNSYLVANIA. THE PURPOSE OF MODIFICATION NUMBER 4 IS TO EXERCISE OPTION YEAR THREE TO EXTEND THE TERM OF THE CONTRACT FROM JANUARY 1, 2015 THROUGH DECEMBER 31, 2015 FOR RECEIPT OF DEATH RECORDS.	\$0.00	\$0.00	2015	12/29/2014	SS001260040		4	OTHER THAN SMALL BUSINESS
OFFICE OF THE GOVERNOR	ELECTRONIC DEATH REGISTRATION - PUERTO RICO. THE PURPOSE OF MODIFICATION NUMBER 4 IS TO EXERCISE OPTION YEAR THREE TO EXTEND THE TERM OF THE CONTRACT FROM JANUARY 1, 2015 THROUGH DECEMBER 31, 2015 FOR RECEIPT OF DEATH RECORDS.	\$0.00	\$0.00	2015	12/11/2014	SS001260048		4	OTHER THAN SMALL BUSINESS
HEALTH, RHODE ISLAND DEPARTMENT OF	ELECTRONIC DEATH REGISTRATION RHODE ISLAND THE PURPOSE OF MODIFICATION NUMBER 6 IS TO EXERCISE OPTION YEAR IV TO EXTEND THE TERM OF THE CONTRACT FROM JANUARY 1, 2016 THROUGH DECEMBER 31, 2016 FOR RECEIPT OF ELECTRONIC DEATH RECORDS.	\$0.00	\$0.00	2016	12/3/2015	SS001260050		6	OTHER THAN SMALL BUSINESS
HEALTH, RHODE ISLAND DEPARTMENT OF	ELECTRONIC DEATH REGISTRATION - RHODE ISLAND. THE PURPOSE OF MODIFICATION NUMBER 4 IS TO EXERCISE OPTION YEAR THREE TO EXTEND THE TERM OF THE CONTRACT FROM JANUARY 1, 2015 THROUGH DECEMBER 31, 2015 FOR RECEIPT OF DEATH RECORDS.	\$0.00	\$0.00	2015	12/30/2014	SS001260050		4	OTHER THAN SMALL BUSINESS
HEALTH, RHODE ISLAND DEPARTMENT OF	ELECTRONIC DEATH REGISTRATION - RHODE ISLAND. THE PURPOSE OF MODIFICATION NUMBER 5 IS TO INCORPORATE AN INVOICE PROCESS CHANGE.	\$0.00	\$0.00	2015	1/26/2015	SS001260050		5	OTHER THAN SMALL BUSINESS
SOUTH DAKOTA, STATE OF	ELECTRONIC DEATH REGISTRATION SOUTH DAKOTA MODIFICATION CORRECTS THE DUNS NUMBER.	\$0.00	\$0.00	2016	2/2/2016	SS001260055		6	OTHER THAN SMALL BUSINESS
HEALTH, TENNESSEE DEPT OF	ELECTRONIC DEATH REGISTRATION - TENNESSEE MODIFICATION 5 CORRECTS THE CONTRACTOR ADDRESS TO REFLECT THE SAM ADDRESS FOR THE TENNESSEE DEPARTMENT OF HEALTH	\$0.00	\$0.00	2015	6/17/2015	SS001260056		5	OTHER THAN SMALL BUSINESS

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Vendor Name	Description of Requirement	Action Obligation	Base and All Options Value	Fiscal Year	Date Signed	PO/Delivery Order/Task Order/Call#	Parent Contract	Mod #	Contracting Officers Business Size Selection
STATE HEALTH SERVICES, TEXAS DEPARTMENT OF	ELECTRONIC DEATH REGISTRATION TEXAS THE PURPOSE OF MODIFICATION NUMBER 6 IS TO ISSUE A CHANGE TO THE STATEMENT OF WORK REGARDING SSA'S VERIFICATION PROCESS.	\$0.00	\$0.00	2016	1/11/2016	SS001260060		6	OTHER THAN SMALL BUSINESS
HEALTH AND HUMAN RESOURCES, WEST VIRGINIA DEPARTMENT OF	ELECTRONIC DEATH REGISTRATION - WEST VIRGINIA	\$0.00	\$0.00	2015	12/2/2014	SS001260038		6	OTHER THAN SMALL BUSINESS
HEALTH AND HUMAN RESOURCES, WEST VIRGINIA DEPARTMENT OF	ELECTRONIC DEATH REGISTRATION WEST VIRGINIA THE PURPOSE OF MODIFICATION NUMBER 7 IS TO EXERCISE OPTION YEAR IV TO EXTEND THE TERM OF THE CONTRACT FROM JANUARY 1, 2016 THROUGH DECEMBER 31, 2016 FOR RECEIPT OF ELECTRONIC DEATH RECORDS.	\$0.00	\$0.00	2016	12/10/2015	SS001260038		7	OTHER THAN SMALL BUSINESS
WYOMING, DEPARTMENT OF HEALTH	ELECTRONIC DEATH REGISTRATION - WYOMING	\$0.00	\$0.00	2015	12/3/2014	SS001260010		4	OTHER THAN SMALL BUSINESS
PUBLIC HEALTH, ALABAMA DEPARTMENT OF	ELECTRONIC DEATH REGISTRATION ALABAMA THE PURPOSE OF MODIFICATION NUMBER 5 IS TO EXERCISE OPTION YEAR IV TO EXTEND THE TERM OF THE CONTRACT FROM JANUARY 1, 2016 THROUGH DECEMBER 31, 2016 FOR RECEIPT OF ELECTRONIC DEATH RECORDS.	\$0.00	\$0.00	2016	12/9/2015	SS001260012		5	OTHER THAN SMALL BUSINESS
DISTRICT OF COLUMBIA, GOVERNMENT OF	ELECTRONIC DEATH REGISTRATION DISTRICT OF COLUMBIA THE PURPOSE OF MODIFICATION NUMBER 6 IS TO EXERCISE OPTION YEAR IV TO EXTEND THE TERM OF THE CONTRACT FROM JANUARY 1, 2016 THROUGH DECEMBER 31, 2016 FOR RECEIPT OF ELECTRONIC DEATH RECORDS.	\$0.00	\$0.00	2016	12/3/2015	SS001260019		6	OTHER THAN SMALL BUSINESS
HEALTH AND HUMAN SERVICES, MAINE DEPARTMENT OF	ELECTRONIC DEATH REGISTRATION MAINE THE PURPOSE OF MODIFICATION NUMBER 5 IS TO EXERCISE OPTION YEAR IV TO EXTEND THE TERM OF THE CONTRACT FROM JANUARY 1, 2016 THROUGH DECEMBER 31, 2016 FOR RECEIPT OF ELECTRONIC DEATH RECORDS.	\$0.00	\$0.00	2016	11/5/2015	SS001260043		5	OTHER THAN SMALL BUSINESS
HEALTH, MISSISSIPPI STATE DEPARTMENT OF	ELECTRONIC DEATH REGISTRATION MISSISSIPPI THE PURPOSE OF MODIFICATION NUMBER 5 IS TO EXERCISE OPTION YEAR IV TO EXTEND THE TERM OF THE CONTRACT FROM JANUARY 1, 2016 THROUGH DECEMBER 31, 2016 FOR RECEIPT OF ELECTRONIC DEATH RECORDS.	\$0.00	\$0.00	2016	12/3/2015	SS001260025		5	OTHER THAN SMALL BUSINESS
PUBLIC HEALTH SOLUTIONS	ELECTRONIC DEATH REGISTRATION PUBLIC HEALTH SOLUTIONS ON BEHALF OF NEW YORK CITY THE PURPOSE OF MODIFICATION NUMBER 5 IS TO EXERCISE OPTION YEAR IV TO EXTEND THE TERM OF THE CONTRACT FROM JANUARY 1, 2016 THROUGH DECEMBER 31, 2016 FOR RECEIPT OF ELECTRONIC DEATH RECORDS.	\$0.00	\$0.00	2016	12/3/2015	SS001260033		5	OTHER THAN SMALL BUSINESS
OFFICE OF THE GOVERNOR	ELECTRONIC DEATH REGISTRATION PUERTO RICO THE PURPOSE OF MODIFICATION NUMBER 5 IS TO EXERCISE OPTION YEAR IV TO EXTEND THE TERM OF THE CONTRACT FROM JANUARY 1, 2016 THROUGH DECEMBER 31, 2016 FOR RECEIPT OF ELECTRONIC DEATH RECORDS.	\$0.00	\$0.00	2016	12/3/2015	SS001260048		5	OTHER THAN SMALL BUSINESS
DLT SOLUTIONS INCORPORATED	EXERCISE AN OPTION FOR THE PERIOD JANUARY 1, 2016	\$152,100.00	\$0.00	2016	12/22/2015	SS001431684	W91QUZ06A0004	3	SMALL BUSINESS
PITNEY BOWES GLOBAL FINANCIAL SERVICES LLC	EXERCISE OPTION 3 AND ADD A SECOND ALTERNATE CO	\$0.00	\$0.00	2016	6/23/2016	SS001360018		6	OTHER THAN SMALL BUSINESS
ROCKET SOFTWARE, INC.	EXERCISE OPTION I FOR THE ANNUAL RENEWAL OF MAIN	\$581,601.00	\$0.00	2016	8/8/2016	SS001560048		1	OTHER THAN SMALL BUSINESS
INNOVATION DATA PROCESSING, INC.	EXERCISE OPTION YEAR I - SS00-15-50008 - INNOVATION DATA PROCESSING FDR/CPK, ABR/FDRREORG, FDRPAS AND FDRMOVE SOFTWARE	\$332,380.00	\$0.00	2015	3/9/2015	SS001550008		2	OTHER THAN SMALL BUSINESS
PHOENIX SOFTWARE INTERNATIONAL, INC.	EXERCISE OPTION-1, MAINTENANCE ON PHOENIX SOFTW	\$1,065,772.00	\$0.00	2016	2/16/2016	SS001560023		2	OTHER THAN SMALL BUSINESS

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Vendor Name	Description of Requirement	Action Obligation	Base and All Options Value	Fiscal Year	Date Signed	PO/Delivery Order/Task Order/Call#	Parent Contract	Mod #	Contracting Officers Business Size Selection
HOLLINGSWORTH, SHAW	EXTENDING BPA THROUGH MARCH 31, 2018.	\$0.00	\$0.00	2016	7/8/2016	SS040940008		4	SMALL BUSINESS
FALON SOURCING SOLUTIONS LLC	FUND THE CONTRACT FOR 1 MONTH	\$36,425.22	\$0.00	2016	12/23/2015	SS001660005		1	SMALL BUSINESS
RELIASOURCE, INC.	FUNDING IS BEING OBLIGATED TO COVER MODIFICATION 2. NO ADDITIONAL FUNDS ARE PROVIDED. THIS IS AN ADMINISTRATIVE MODIFICATION. IGF::OT::IGF	\$525,961.92	\$0.00	2015	2/4/2015	SS001350271		4	SMALL BUSINESS
SOLAR TURBINES INCORPORATED	GENERATOR MAINTENANCE - NCC MOD TO CHANGE CO	\$0.00	\$0.00	2015	1/16/2015	SS000760043		19	OTHER THAN SMALL BUSINESS
INTEGRATED SECURITY TECHNOLOGIES, INC.	HIGF::CT::IGF ID PIVCLASS MAINTENANCE SERVICE AND SUPPORT AGREEMENT FOR THE NATIONAL SUPPORT CENTER	\$0.00	\$0.00	2017	11/21/2016	SS001650266		1	SMALL BUSINESS
HERMAN MILLER, INC.	HMI FURNITURE FOR PERMANENT WORKSTATION AT BA	\$0.00	\$0.00	2016	9/13/2016	SS001231168	SS001260003	3	OTHER THAN SMALL BUSINESS
ROSENSHIELD, PHILIP	IGF::CL::IGF CLOSELY ASSOCIATED - REGIONAL MEDICA	\$0.00	\$0.00	2016	3/9/2016		11 SS071140027	1	SMALL BUSINESS
HELLER, EUGENE	IGF::CL::IGF CLOSELY ASSOCIATED - CHANGE PERIOD O	\$0.00	\$0.00	2016	6/28/2016		1 SS08164C008	2	SMALL BUSINESS
SNYDER, LYNN E	IGF::CL::IGF CLOSELY ASSOCIATED - CHANGE PERIOD O	\$0.00	\$0.00	2016	6/28/2016		1 SS08164C021	2	SMALL BUSINESS
LEARNING FROM THE JOURNEY INC	IGF::CL::IGF CLOSELY ASSOCIATED - CHANGE PERIOD O	\$0.00	\$0.00	2016	6/28/2016		2 SS08164C013	1	SMALL BUSINESS
BRENNER, ANNE MANON MD	IGF::CL::IGF CLOSELY ASSOCIATED - CHANGE PERIOD O	\$0.00	\$0.00	2016	6/21/2016		3 SS08164C002	2	SMALL BUSINESS
BRENNER, ANNE MANON MD	IGF::CL::IGF CLOSELY ASSOCIATED - CHANGE PERIOD O	\$0.00	\$0.00	2016	6/21/2016		1 SS08164C002	2	SMALL BUSINESS
BRENNER, ANNE MANON MD	IGF::CL::IGF CLOSELY ASSOCIATED - CHANGE PERIOD O	\$0.00	\$0.00	2016	6/21/2016		2 SS08164C002	2	SMALL BUSINESS
RICHARD H SWEETMAN PHD	IGF::CL::IGF CLOSELY ASSOCIATED - CHANGE PERIOD O	\$0.00	\$0.00	2016	7/6/2016		1 SS08164C023	2	SMALL BUSINESS
BRILL, ROBERT M	IGF::CL::IGF CLOSELY ASSOCIATED - CHANGE PERIOD O	\$0.00	\$0.00	2016	6/17/2016		2 SS08164C004	1	SMALL BUSINESS
DRS MARTINEZ & MARTINEZ PC	IGF::CL::IGF CLOSELY ASSOCIATED - CHANGE PERIOD O	\$0.00	\$0.00	2016	6/14/2016		1 SS08164C016	2	SMALL BUSINESS
FERLIC, DONALD C.	IGF::CL::IGF CLOSELY ASSOCIATED - CHANGE PERIOD O	\$0.00	\$0.00	2016	6/16/2016		1 SS08164C005	2	SMALL BUSINESS
FERLIC, DONALD C.	IGF::CL::IGF CLOSELY ASSOCIATED - CHANGE PERIOD O	\$0.00	\$0.00	2016	6/28/2016		2 SS08164C005	1	SMALL BUSINESS
HOWARD T HORSLEY JR MD PC	IGF::CL::IGF CLOSELY ASSOCIATED - CHANGE PERIOD O	\$0.00	\$0.00	2016	6/23/2016		1 SS08164C009	2	SMALL BUSINESS
LEARNING FROM THE JOURNEY INC	IGF::CL::IGF CLOSELY ASSOCIATED - CHANGE PERIOD O	\$0.00	\$0.00	2016	6/21/2016		1 SS08164C013	2	SMALL BUSINESS
OLIVARES, RAFAEL J	IGF::CL::IGF CLOSELY ASSOCIATED - CHANGE PERIOD O	\$0.00	\$0.00	2016	6/28/2016		1 SS08164C018	2	SMALL BUSINESS
SUSMAN, MORRIS H	IGF::CL::IGF CLOSELY ASSOCIATED - CHANGE PERIOD O	\$0.00	\$0.00	2016	6/16/2016		1 SS08164C022	2	SMALL BUSINESS
THOMAS MAYEDA	IGF::CL::IGF CLOSELY ASSOCIATED - CHANGE PERIOD O	\$0.00	\$0.00	2016	6/29/2016		1 SS08164C017	2	SMALL BUSINESS
TELLA NLNI MD INTNL MED RHUMA	IGF::CL::IGF CLOSELY ASSOCIATED - REGIONAL MEDICA	\$0.00	\$0.00	2015	2/24/2015		9 SS071140031	1	SMALL BUSINESS
TELLA NLNI MD INTNL MED RHUMA	IGF::CL::IGF CLOSELY ASSOCIATED - REGIONAL MEDICA	\$0.00	\$0.00	2015	7/27/2015		9 SS071140031	2	SMALL BUSINESS
LIPETZ, PSY. D, BRUCE D	IGF::CL::IGF CLOSELY ASSOCIATED - CHANGE PERIOD OF PERFORMANCE END DATE FOR REGIONAL MEDICAL CONTRACTOR SERVICES FOR REGION 8 FOR THE SOCIAL SECURITY ADMINISTRATION. REVIEWS BY MEDICAL CONSULTANT OF DISABILITY CLAIM CASE FILES FOR AGENCY DISABILITY PROGRAM.	\$0.00	\$0.00	2016	6/14/2016		2 SS08164C014	2	SMALL BUSINESS
LIPETZ, PSY. D, BRUCE D	IGF::CL::IGF CLOSELY ASSOCIATED - INCREASE NON-CAS	\$0.00	\$0.00	2016	9/7/2016		2 SS08164C014	4	SMALL BUSINESS
ARNOLD, CHARLES O II	IGF::CL::IGF CLOSELY ASSOCIATED - REGIONAL MEDICAL CONTRACTOR SERVICES FOR REGION 8 - CHANGE PERIOD OF PERFORMANCE END DATE FOR THE SOCIAL SECURITY ADMINISTRATION. REVIEWS BY MEDICAL CONSULTANT OF DISABILITY CLAIM CASE FILES FOR AGENCY DISABILITY PROGRAM.	\$0.00	\$0.00	2016	6/10/2016		1 SS08164C003	2	SMALL BUSINESS
FLATIRON'S MEDICAL CONSULTANTS, LLC.	IGF::CL::IGF CLOSELY ASSOCIATED - REGIONAL MEDICA	\$0.00	\$0.00	2016	7/13/2016		1 SS08164C006	1	SMALL BUSINESS
YAMAMOTO MD, FRANCIS K	IGF::CL::IGF CLOSELY ASSOCIATED - REGIONAL MEDICA	\$0.00	\$0.00	2016	6/15/2016		3 SS08164C026	1	SMALL BUSINESS
HEALTH, PENNSYLVANIA DEPARTMENT OF	IGF::CL::IGF CLOSELY ASSOCIATED ADMINISTRATIVE CORRECTION TO CHANGE THE ADDRESS TO LINE TO FRANK CANIGLIA.	\$0.00	\$0.00	2016	12/29/2015		5 SS001260040	1	OTHER THAN SMALL BUSINESS

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Vendor Name	Description of Requirement	Action Obligation	Base and All Options Value	Fiscal Year	Date Signed	PO/Delivery Order/Task Order/Call#	Parent Contract	Mod #	Contracting Officers Business Size Selection
INFORMATION SYSTEMS, ARKANSAS, DEPARTMENT OF	IGF::CL::IGF CLOSELY ASSOCIATED EXERCISE OPTION YEAR 2: ARKANSAS DEPARTMENT OF INFORMATION SYSTEMS - CPU TIME - PROVIDE ONLINE BIRTH VERIFICATIONS IN FIELD OFFICES.	\$9,000.00	\$0.00	2015	6/8/2015	SS011360001		2	OTHER THAN SMALL BUSINESS
INFORMATION SYSTEMS, ARKANSAS, DEPARTMENT OF	IGF::CL::IGF CLOSELY ASSOCIATED EXERCISE OPTION YEAR 2: ARKANSAS DEPARTMENT OF INFORMATION SYSTEMS - CPU TIME - PROVIDE ONLINE BIRTH VERIFICATIONS IN FIELD OFFICES.	\$9,000.00	\$0.00	2016	4/21/2016	SS011360001		3	OTHER THAN SMALL BUSINESS
SOUTH DAKOTA, STATE OF	IGF::CL::IGF CLOSELY ASSOCIATED MODIFICATION CORRECTS THE DUNS NUMBER.	\$0.00	\$0.00	2016	2/2/2016		5 SS001260055	1	OTHER THAN SMALL BUSINESS
BERKOWITZ, MARK PSY D	IGF::CL::IGF CLOSELY ASSOCIATED - DE-OBLIGATE FUN	\$0.00	\$0.00	2016	7/25/2016		1 SS08164C001	3	SMALL BUSINESS
ANNAMS SYSTEMS CORPORATION	IGF::CL::IGF MODIFICATION 3 TO UPDATE THE FISMA CL	\$0.00	\$0.00	2015	1/16/2015	SS001461010		3	SMALL BUSINESS
ANNAMS SYSTEMS CORPORATION	IGF::CL::IGF MODIFICATION 4 TO UPDATE THE CONTRA	\$0.00	\$0.00	2015	3/5/2015	SS001461010		4	SMALL BUSINESS
HEALTH MENTAL HYGIENE MD DEPT	IGF::CL::IGF MODIFICATION 1 TO EXTEND THE PERIOD O	\$0.00	\$0.00	2016	9/28/2016	SS001660021		1	OTHER THAN SMALL BUSINESS
HEALTH & HUMAN SERVICES, MICHIGAN DEPARTMENT OF	IGF::CL::IGF MODIFICATION TO EXTEND THE PERIOD OF	\$0.00	\$0.00	2017	10/24/2016	SS001660019		1	OTHER THAN SMALL BUSINESS
BOLDEN, KIELA	IGF::CL::IGF CLOSELY ASSOCIATED - REGIONAL MEDICAL	\$0.00	\$0.00	2016	3/25/2016		1 SS05154C003	1	SMALL BUSINESS
AURELIUS SMITH, RICHARD, M.D.	IGF::CL::IGF FOR CLOSELY ASSOCIATED TO INHERENTLY GOVERNEMENTAL FUNCTION MEDICAL CONSULTANT - PHYSICAL CASES - MOD 01 TO EXTEND PERFORMANCE PERIOD	\$0.00	\$0.00	2015	12/15/2014		12 SS041140047	1	SMALL BUSINESS
PESANDO, JOHN	IGF::CL::IGF JOHN PESANDO, MC, REG. 10 EXTENDING THE POP	\$0.00	\$0.00	2016	12/23/2015		11 SS101140018	1	SMALL BUSINESS
DARRELL R CAUDILL M D	IGF::CL::IGF MEDICAL CONTRACTOR SERVICES - MENTAL CASES CLOSELY ASSOCIATED TO INHERENTLY GOVERNMENTAL FUNCTION	\$0.00	\$0.00	2016	12/16/2015		12 SS041140035	1	SMALL BUSINESS
MEADOWDALE MEDICAL CONSULTING, PLLC	IGF::CL::IGF MERRILL, MC, REG. 10	\$0.00	\$0.00	2015	6/17/2015		3 SS10154C000	1	SMALL BUSINESS
HAYNE JR, VAN B.	IGF::CL::IGF MODIFICATION TO EXTEND THE PERIOD OF F	\$0.00	\$0.00	2017	11/3/2016		1 SS04164C060	2	SMALL BUSINESS
NEUROTHERAPY CENTER OF PLANO INC	IGF::CL::IGF RMC CALL ORDER - ATKINS - HOURS	\$0.00	\$0.00	2015	3/6/2015		12 SS061140027	1	SMALL BUSINESS
BANKHEAD, JACK B, MD	IGF::CL::IGF RMC CALL ORDER - BANKHEAD - HOURS	\$0.00	\$0.00	2015	3/6/2015		9 SS061140028	1	SMALL BUSINESS
MOHNEY, CAROL	IGF::CL::IGF EXTEND MEDICAL CONSULTANT SERVICES	\$0.00	\$0.00	2015	3/30/2015		11 SS061140016	1	SMALL BUSINESS
PAUL CHERRY, PH.D., INC.	IGF::CL::IGF EXTEND MEDICAL CONSULTANT SERVICES	\$0.00	\$0.00	2015	3/27/2015		12 SS061140007	1	SMALL BUSINESS
RALPH ROBINOWITZ PHD	IGF::CL::IGF EXTEND MEDICAL CONSULTANT SERVICES	\$0.00	\$0.00	2015	3/26/2015		12 SS061140022	1	SMALL BUSINESS
KAREN SCHNUTE MD PA	IGF::CL::IGF INDEPENDENT CASE REVIEWS	\$0.00	\$0.00	2015	3/3/2015		12 SS061140023	1	SMALL BUSINESS
ALVIN SMITH PHD	IGF::CL::IGF MEDICAL CONSULTANT SERVICES	\$0.00	\$0.00	2015	3/23/2015		11 SS061140024	1	SMALL BUSINESS
GLASS MD, KENNETH D	IGF::CL::IGF MEDICAL CONSULTANT SERVICES	\$0.00	\$0.00	2015	3/24/2015		11 SS061140010	1	SMALL BUSINESS
LAMMERS MD, BONNIE JEAN	IGF::CL::IGF MEDICAL CONSULTANT SERVICES	\$0.00	\$0.00	2015	3/24/2015		11 SS061140029	1	SMALL BUSINESS

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Vendor Name	Description of Requirement	Action Obligation	Base and All Options Value	Fiscal Year	Date Signed	PO/Delivery Order/Task Order/Call#	Parent Contract	Mod #	Contracting Officers Business Size Selection
LOGAN, WILLIAM M	IGF::CL::IGF MEDICAL CONSULTANT SERVICES	\$0.00	\$0.00	2015	3/24/2015	17	SS061140038	1	SMALL BUSINESS
MOHNEY, CAROL	IGF::CL::IGF MEDICAL CONSULTANT SERVICES	\$0.00	\$0.00	2015	3/26/2015	10	SS061140016	1	SMALL BUSINESS
REES M. D., MARY LANETTE	IGF::CL::IGF MEDICAL CONSULTANT SERVICES	\$0.00	\$0.00	2015	3/26/2015	11	SS061140021	1	SMALL BUSINESS
STERLING E MOORE	IGF::CL::IGF MEDICAL CONSULTANT SERVICES	\$0.00	\$0.00	2015	3/31/2015	9	SS061140018	1	SMALL BUSINESS
VORHIES JR MD, JOHN R	IGF::CL::IGF MEDICAL CONSULTANT SERVICES	\$0.00	\$0.00	2015	3/23/2015	10	SS061140026	1	SMALL BUSINESS
WATKINS, MYRON MD	IGF::CL::IGF MEDICAL CONSULTANT SERVICES	\$0.00	\$0.00	2015	3/10/2015	9	SS061140035	1	SMALL BUSINESS
BILLINGHURST, CRAIG MD	IGF::CL::IGF MEDICAL CONSULTANT SERVICES - DR. BILLINGHURST	\$0.00	\$0.00	2015	3/27/2015	11	SS061140003	1	SMALL BUSINESS
STEVEN P BOWERS	IGF::CL::IGF MEDICAL CONSULTANT SERVICES - DR. BOWERS	\$0.00	\$0.00	2015	3/23/2015	18	SS061140039	1	SMALL BUSINESS
DEES, MD, TOM M	IGF::CL::IGF MEDICAL CONSULTANT SERVICES - DR. DEES	\$0.00	\$0.00	2015	3/10/2015	11	SS061140009	1	SMALL BUSINESS
VAN HOOSE, THOMAS A PHD	IGF::CL::IGF MEDICAL CONSULTANT SERVICES - DR. VANHOOSE	\$0.00	\$0.00	2015	3/10/2015	10	SS061140025	1	SMALL BUSINESS
LOGAN, WILLIAM M	IGF::CL::IGF REGION 6 MEDICAL CONSULTANTS. REVIEWS BY MEDICAL CONSULTANT OF DISABILITY CLAIM CASE FILES FOR AGENCY DISABILITY PROGRAM.	\$0.00	\$0.00	2015	1/12/2015	19	SS061140038	1	SMALL BUSINESS
LOGAN, WILLIAM M	IGF::CL::IGF REGION 6 MEDICAL RMA EXTENSION	\$0.00	\$0.00	2015	3/30/2015	19	SS061140038	2	SMALL BUSINESS
LOGAN, WILLIAM M	IGF::CL::IGF REGION 6 MEDICAL RMA EXTENSION	\$0.00	\$0.00	2015	6/24/2015	19	SS061140038	4	SMALL BUSINESS
BILLINGHURST, CRAIG MD	IGF::CL::IGF REGION 6 MEDICAL RMC EXTENSION	\$0.00	\$0.00	2016	12/16/2015	13	SS061140003	2	SMALL BUSINESS
DEES, MD, TOM M	IGF::CL::IGF REGION 6 MEDICAL RMC EXTENSION	\$0.00	\$0.00	2016	12/16/2015	13	SS061140009	1	SMALL BUSINESS
NANCY ARMSTRONG MD	IGF::CL::IGF RMC CALL ORDER - ARMSTRONG - CASES	\$0.00	\$0.00	2015	3/24/2015	11	SS061140002	1	SMALL BUSINESS
NEUROTHERAPY CENTER OF PLANO INC	IGF::CL::IGF RMC CALL ORDER - ATKINS - CASES	\$0.00	\$0.00	2015	3/25/2015	11	SS061140027	1	SMALL BUSINESS
BANKHEAD, JACK B, MD	IGF::CL::IGF RMC CALL ORDER - BANKHEAD - CASES	\$0.00	\$0.00	2015	3/23/2015	8	SS061140028	1	SMALL BUSINESS

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Vendor Name	Description of Requirement	Action Obligation	Base and All Options Value	Fiscal Year	Date Signed	PO/Delivery Order/Task Order/Call#	Parent Contract	Mod #	Contracting Officers Business Size Selection
CASTRO, SUZANNE K	IGF::CL::IGF RMC CALL ORDER - CASTRO - CASES	\$0.00	\$0.00	2015	3/23/2015	8	SS061140031	1	SMALL BUSINESS
CASTRO, SUZANNE K	IGF::CL::IGF RMC CALL ORDER - CASTRO - HOURS	\$0.00	\$0.00	2015	3/6/2015	9	SS061140031	1	SMALL BUSINESS
PAUL CHERRY, PH.D., INC.	IGF::CL::IGF RMC CALL ORDER - CHERRY - CASES	\$0.00	\$0.00	2015	3/6/2015	11	SS061140007	1	SMALL BUSINESS
COX DAN M	IGF::CL::IGF RMC CALL ORDER - COX - CASES	\$0.00	\$0.00	2015	3/23/2015	9	SS061140008	1	SMALL BUSINESS
JOHNSON CONSULTANTS, INC	IGF::CL::IGF RMC CALL ORDER - JOHNSON - CASES	\$0.00	\$0.00	2015	3/27/2015	9	SS061140013	1	SMALL BUSINESS
MOORE, YONDELL	IGF::CL::IGF RMC CALL ORDER - MOORE, Y. - CASES	\$0.00	\$0.00	2015	3/27/2015	11	SS061140019	1	SMALL BUSINESS
RALPH ROBINOWITZ PHD	IGF::CL::IGF RMC CALL ORDER - ROBINOWITZ - CASES	\$0.00	\$0.00	2015	3/26/2015	11	SS061140022	1	SMALL BUSINESS
RYAN MD, COLLEEN M	IGF::CL::IGF RMC CALL ORDER - RYAN - CASES	\$0.00	\$0.00	2015	3/30/2015	10	SS061140030	1	SMALL BUSINESS
COLONIAL PARKING, INC.	IGF::CL::IGF ADMINISTRATIVE MODIFICATION TO CHANGE THE CONTRACTING OFFICER AND THE PURCHASING AGENT TO A CONTRACT THAT PROVIDES PARKING SPACES AND VALIDATIONS STICKERS FOR ITC BUILDING 500 E ST AND WORLD TRADE CENTER 400 VIRGINIA AVE.	\$8,607.74	\$0.00	2015	12/23/2014	SS001461016		3	OTHER THAN SMALL BUSINESS
COLONIAL PARKING, INC.	IGF::CL::IGF ADMINISTRATIVE MODIFICATION TO CHANGE THE CONTRACTOR POINT OF CONTACT (POC) ON A CONTRACT THAT PROVIDES PARKING SPACES AND VALIDATIONS STICKERS FOR ITC BUILDING 500 E ST AND WORLD TRADE CENTER 400 VIRGINIA AVE.	\$0.00	\$0.00	2015	2/3/2015	SS001461016		5	OTHER THAN SMALL BUSINESS
STEVEN P BOWERS	IGF::CL::IGF BOWERS - CALL ORDER - RMA	\$0.00	\$0.00	2015	6/2/2015	21	SS061140039	1	SMALL BUSINESS
STEVEN P BOWERS	IGF::CL::IGF BOWERS - CALL ORDER - RMA	\$0.00	\$0.00	2016	12/16/2015	21	SS061140039	2	SMALL BUSINESS
BROOKS-WARREN M. D., JUANITA ANNETTE	IGF::CL::IGF CHANGED PERFORMANCE END DATE	\$0.00	\$0.00	2016	12/15/2015	16	SS041040087	1	SMALL BUSINESS
COYLE PHD, ROBERT T	IGF::CL::IGF CHANGED PERFORMANCE END DATE	\$0.00	\$0.00	2016	12/15/2015	10	SS041140068	2	SMALL BUSINESS
GAIR, CELINE PAYNE PHD	IGF::CL::IGF CHANGED PERFORMANCE END DATE	\$0.00	\$0.00	2016	12/16/2015	16	SS041040091	1	SMALL BUSINESS
LARRY V CALDWELL MD	IGF::CL::IGF CHANGED PERFORMANCE END DATE	\$0.00	\$0.00	2016	12/17/2015	18	SS041040096	1	SMALL BUSINESS
O'BRIEN, DEREK J MD	IGF::CL::IGF CHANGED PERFORMANCE END DATE	\$0.00	\$0.00	2016	12/15/2015	16	SS041040088	1	SMALL BUSINESS
VANDERPLATE, CALVIN	IGF::CL::IGF CHANGED PERFORMANCE END DATE	\$0.00	\$0.00	2016	12/15/2015	15	SS041140065	1	SMALL BUSINESS
COLONIAL PARKING, INC.	IGF::CL::IGF EXERCISE OPTION YEAR II WITH COLONIAL PARKING WHICH PROVIDES PARKING SPACES AND VALIDATIONS STICKERS FOR ITC BUILDING 500 E ST AND WORLD TRADE CENTER 400 VIRGINIA AVE.	\$108,118.70	\$0.00	2016	12/28/2015	SS001461016		6	OTHER THAN SMALL BUSINESS

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JOHNSON CONSULTANTS, INC	IGF::CL::IGF EXTEND MED CONSULTANT SERVICES	\$0.00	\$0.00	2015	3/30/2015	10	SS061140013	1	SMALL BUSINESS
ALVIN SMITH PHD	IGF::CL::IGF EXTEND MEDICAL CONSULTANT SERVICES	\$0.00	\$0.00	2015	3/31/2015	12	SS061140024	1	SMALL BUSINESS
COX DAN M	IGF::CL::IGF EXTEND MEDICAL CONSULTANT SERVICES	\$0.00	\$0.00	2015	3/25/2015	10	SS061140008	1	SMALL BUSINESS
LEV PHD, JULIAN	IGF::CL::IGF EXTEND MEDICAL CONSULTANT SERVICES	\$0.00	\$0.00	2015	3/25/2015	11	SS061140034	1	SMALL BUSINESS
PUERTO RICO POLICE DEPARTMENT	IGF::CL::IGF INVESTIGATIVE SERVICES TO SUPPORT THE PUERTO RICO CDI UNIT EXERCISE OPTION YEAR 2.	\$216,039.12	\$0.00	2015	8/10/2015	SS021360001		3	OTHER THAN SMALL BUSINESS
PUERTO RICO POLICE DEPARTMENT	IGF::CL::IGF INVESTIGATIVE SERVICES TO SUPPORT THE PUERTO RICO CDI UNIT EXERCISE OPTION YEAR 3.	\$216,539.12	\$0.00	2016	7/21/2016	SS021360001		5	OTHER THAN SMALL BUSINESS
GLASS MD, KENNETH D	IGF::CL::IGF MEDICAL CONSULTANT SERVICES	\$0.00	\$0.00	2015	3/24/2015	10	SS061140010	2	SMALL BUSINESS
LOGAN, WILLIAM M	IGF::CL::IGF MEDICAL CONSULTANT SERVICES	\$0.00	\$0.00	2015	3/25/2015	18	SS061140038	1	SMALL BUSINESS
VAN HOOSE, THOMAS A PHD	IGF::CL::IGF MEDICAL CONSULTANT SERVICES	\$0.00	\$0.00	2015	3/24/2015	11	SS061140025	1	SMALL BUSINESS
VORHIES JR MD, JOHN R	IGF::CL::IGF MEDICAL CONSULTANT SERVICES	\$0.00	\$0.00	2015	3/27/2015	11	SS061140026	1	SMALL BUSINESS
CORTEZ, JENNIFER A	IGF::CL::IGF MEDICAL CONSULTANT TO CONDUCT INDEPENDENT CASE REVIEWS.	\$0.00	\$0.00	2016	8/1/2016	6	SS021240005	1	SMALL BUSINESS
MAUREEN DINGES DR	IGF::CL::IGF MEDICAL CONTRACTOR SERVICES, PHYSICAL CASE REVIEWS CHANGED PERFORMANCE END DATE	\$0.00	\$0.00	2016	12/16/2015	20	SS041140057	2	SMALL BUSINESS
RICHMOND, JOISANNE	IGF::CL::IGF MEDICAL CONTRACTOR SERVICES, PHYSICAL CASE REVIEWS CHANGED PERFORMANCE END DATE	\$0.00	\$0.00	2016	12/22/2015	11	SS041140045	1	SMALL BUSINESS
THOMAS S ROWE MD	IGF::CL::IGF MEDICAL CONTRACTOR SERVICES, PHYSICAL CASE REVIEWS CHANGED PERFORMANCE END DATE	\$0.00	\$0.00	2016	12/22/2015	18	SS041140049	1	SMALL BUSINESS
COLONIAL PARKING, INC.	IGF::CL::IGF MOD TO CORRECT CO INVOICE REVIEW OPTION.	\$0.00	\$0.00	2016	4/12/2016	SS001461016		7	OTHER THAN SMALL BUSINESS
EATON CORPORATION	IGF::CL::IGF MODIFICATION TO ADD ALT COTR AND UPDATE CONTRACT CLAUSES FOR PREVENTIVE MAINTENANCE AGREEMENT FOR UPS AND BATTERY STRINGS FOR THE KANSAS CITY ROCC	\$0.00	\$0.00	2016	11/30/2015	SS071460001		4	SMALL BUSINESS
COLONIAL PARKING, INC.	IGF::CL::IGF MODIFICATION TO FULLY FUND THE CONTRACT FOR REMAINING ELEVEN MONTHS THROUGH DECEMBER 31, 2015; AND MAKE AN ADMINISTRATIVE CHANGE TO CORRECT A MATHEMATICAL ERROR IN THE CONTRACT ADDENDUM UNDER SECTION A-PRICES, A-2.3 FOR OPTION YEAR THREE. THE LISTED TOTAL PRICE AMOUNT FOR VALIDATION STICKERS WAS CORRECTED FROM \$6,799.68 TO \$23,114.00.	\$96,361.08	\$0.00	2015	1/28/2015	SS001461016		4	OTHER THAN SMALL BUSINESS
MOHNEY, CAROL	IGF::CL::IGF MOHNEY - CALL ORDER - REVIEWS EXTEND PERFORMANCE PERIOD	\$0.00	\$0.00	2016	12/17/2015	12	SS061140016	2	SMALL BUSINESS



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ELVA J. MONTOYA, M.D., P.A.	IGF::CL::IGF MONTOYA - CALL ORDER - CASES EXTEND PERFORMANCE PERIOD	\$0.00	\$0.00	2016	12/17/2015	13	SS061140017	1	SMALL BUSINESS
STERLING E MOORE	IGF::CL::IGF MOORE, S. - CALL ORDER - CASES EXTEND PERFORMANCE PERIOD	\$0.00	\$0.00	2016	12/16/2015	11	SS061140018	1	SMALL BUSINESS
MURPHY MD PA, CHARLES M.	IGF::CL::IGF MURPHY - CALL ORDER - CASES EXTEND PERIOD OF PERFORMANCE	\$0.00	\$0.00	2016	12/16/2015	2	SS061440033	1	SMALL BUSINESS
GEORGE K GANAWAY, MD, PC	IGF::CL::IGF NON-INDEPENDENT CASE REVIEWS HOURS	\$0.00	\$0.00	2015	12/15/2014	9	SS041140071	1	SMALL BUSINESS
REES M. D., MARY LANETTE	IGF::CL::IGF REES - CALL ORDER -CASES EXTEND PERFORMANCE PERIOD	\$0.00	\$0.00	2016	12/16/2015	12	SS061140021	1	SMALL BUSINESS
ELLIOTT J GOYTIA, MD, MA	IGF::CL::IGF REGION 2 MEDICAL CONSULTANTS. REVIEWS BY MEDICAL CONSULTANT OF DISABILITY CLAIM CASE FILES FOR AGENCY DISABILITY PROGRAM. MODIFICATION TO EXTEND THE PERIOD OF PERFORMANCE.	\$0.00	\$0.00	2015	6/29/2015	12	SS021140083	1	SMALL BUSINESS
RITA MORGAN	IGF::CL::IGF REGION 2 MEDICAL CONSULTANTS. REVIEWS BY MEDICAL CONSULTANT OF DISABILITY CLAIM CASE FILES FOR AGENCY DISABILITY PROGRAM. EXTEND PERFORMANCE.	\$0.00	\$0.00	2015	12/29/2014	7	SS021140096	2	SMALL BUSINESS
CORTES, JENNIFER A	IGF::CL::IGF REGION 2 MEDICAL CONSULTANTS. REVIEWS BY MEDICAL CONSULTANT OF DISABILITY CLAIM CASE FILES FOR AGENCY DISABILITY PROGRAM. EXTEND PERIOD OF PERFORMANCE.	\$0.00	\$0.00	2016	6/29/2016	1	SS02164C007	1	SMALL BUSINESS
OSVALDO FULCO	IGF::CL::IGF REGION 2 MEDICAL CONSULTANTS. REVIEWS BY MEDICAL CONSULTANT OF DISABILITY CLAIM CASE FILES FOR AGENCY DISABILITY PROGRAM. MODIFICATION IS TO ADD NON-CASE HOURS. MODIFICATION TO EXTEND PERFORMANCE.	\$0.00	\$0.00	2015	12/12/2014	13	SS021140082	2	SMALL BUSINESS
SPITZ, GARY FRANKLIN	IGF::CL::IGF REGION 2 MEDICAL CONSULTANTS. REVIEWS BY MEDICAL CONSULTANT OF DISABILITY CLAIM CASE FILES FOR AGENCY DISABILITY PROGRAM. MODIFICATION TO CORRECT THE PERIOD OF PERFORMANCE.	\$0.00	\$0.00	2016	6/9/2016	1	SS02164C020	2	SMALL BUSINESS
RITA MORGAN	IGF::CL::IGF REGION 2 MEDICAL CONSULTANTS. REVIEWS BY MEDICAL CONSULTANT OF DISABILITY CLAIM CASE FILES FOR AGENCY DISABILITY PROGRAM. MODIFICATION TO EXTEND PERFORMANCE PERIOD.	\$0.00	\$0.00	2015	8/14/2015	8	SS021140096	2	SMALL BUSINESS
CELEDONIA KOH MD	IGF::CL::IGF REGION 2 MEDICAL CONSULTANTS. REVIEWS BY MEDICAL CONSULTANT OF DISABILITY CLAIM CASE FILES FOR AGENCY DISABILITY PROGRAM. MODIFICATION TO EXTEND PERFORMANCE.	\$0.00	\$0.00	2015	12/18/2014	6	SS021140092	2	SMALL BUSINESS
ELLIOTT J GOYTIA, MD, MA	IGF::CL::IGF REGION 2 MEDICAL CONSULTANTS. REVIEWS BY MEDICAL CONSULTANT OF DISABILITY CLAIM CASE FILES FOR AGENCY DISABILITY PROGRAM. MODIFICATION TO EXTEND PERFORMANCE.	\$0.00	\$0.00	2015	12/12/2014	9	SS021140083	2	SMALL BUSINESS

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Vendor Name	Description of Requirement	Action Obligation	Base and All Options Value	Fiscal Year	Date Signed	PO/Delivery Order/Task Order/Call#	Parent Contract	Mod #	Contracting Officers Business Size Selection
PAZ, ANNETTE DE	IGF::CL::IGF REGION 2 MEDICAL CONSULTANTS. REVIEWS BY MEDICAL CONSULTANT OF DISABILITY CLAIM CASE FILES FOR AGENCY DISABILITY PROGRAM. MODIFICATION TO EXTEND PERFORMANCE.	\$0.00	\$0.00	2015	12/17/2014	1	SS021440024	1	SMALL BUSINESS
PRESTO, JOSEPH	IGF::CL::IGF REGION 2 MEDICAL CONSULTANTS. REVIEWS BY MEDICAL CONSULTANT OF DISABILITY CLAIM CASE FILES FOR AGENCY DISABILITY PROGRAM. MODIFICATION TO EXTEND PERFORMANCE.	\$0.00	\$0.00	2015	9/21/2015	5	SS021240002	1	SMALL BUSINESS
THE AXON GROUP	IGF::CL::IGF REGION 2 MEDICAL CONSULTANTS. REVIEWS BY MEDICAL CONSULTANT OF DISABILITY CLAIM CASE FILES FOR AGENCY DISABILITY PROGRAM. MODIFICATION TO EXTEND PERFORMANCE.	\$0.00	\$0.00	2015	12/16/2014	4	SS021240003	2	SMALL BUSINESS
GONZALEZ, JOSE	IGF::CL::IGF REGION 2 MEDICAL CONSULTANTS. REVIEWS BY MEDICAL CONSULTANT OF DISABILITY CLAIM CASE FILES FOR AGENCY DISABILITY PROGRAM. MODIFICATION TO EXTEND PERIOD OF PERFORMANCE.	\$0.00	\$0.00	2015	8/19/2015	4	SS021240008	1	SMALL BUSINESS
MARY MCLARNON MD	IGF::CL::IGF REGION 2 MEDICAL CONSULTANTS. REVIEWS BY MEDICAL CONSULTANT OF DISABILITY CLAIM CASE FILES FOR AGENCY DISABILITY PROGRAM. MODIFICATION TO EXTEND PERIOD OF PERFORMANCE.	\$0.00	\$0.00	2015	8/13/2015	11	SS021140095	1	SMALL BUSINESS
SEYMOUR R BORTNER MD	IGF::CL::IGF REGION 2 MEDICAL CONSULTANTS. REVIEWS BY MEDICAL CONSULTANT OF DISABILITY CLAIM CASE FILES FOR AGENCY DISABILITY PROGRAM. MODIFICATION TO EXTEND PERIOD OF PERFORMANCE.	\$0.00	\$0.00	2015	12/22/2014	7	SS021140011	2	SMALL BUSINESS
YARED, THOMAS A MD	IGF::CL::IGF REGION 2 MEDICAL CONSULTANTS. REVIEWS BY MEDICAL CONSULTANT OF DISABILITY CLAIM CASE FILES FOR AGENCY DISABILITY PROGRAM. MODIFICATION TO EXTEND PERIOD OF PERFORMANCE.	\$0.00	\$0.00	2015	8/18/2015	8	SS021140109	1	SMALL BUSINESS
NEAL BENTE MD	IGF::CL::IGF REGION 5 MEDICAL CONSULTANTS. REVIEWS BY MEDICAL CONSULTANT OF DISABILITY CLAIM CASE FILES FOR AGENCY DISABILITY PROGRAM. CALL ORDER TO NEAL BENTE.	\$0.00	\$0.00	2016	6/27/2016	1	SS05164C003	1	SMALL BUSINESS
DAUGHERTY, SUSAN E.	IGF::CL::IGF REGIONAL MEDICAL CONSULTANT SERVICES - REVIEWS BY MEDICAL CONSULTANT OF DISABILITY CLAIM CASE FILES FOR AGENCY DISABILITY PROGRAM.	\$0.00	\$0.00	2016	6/21/2016	2	SS06164C031	1	SMALL BUSINESS
ANDREW PRZYBYLA MD PC	IGF::CL::IGF REGIONAL MEDICAL CONSULTANT SERVICES FOR THE SOCIAL SECURITY ADMINISTRATION. REVIEWS BY MEDICAL CONSULTANT OF DISABILITY CLAIM CASE FILES FOR AGENCY DISABILITY PROGRAM. PERIOD OF PERFORMANCE CORRECTION.	\$0.00	\$0.00	2016	7/18/2016	1	SS02164C018	2	SMALL BUSINESS
CHARLES F BRIDGES PHD	IGF::CL::IGF RMC CALL ORDER - BRIDGES - CASES	\$0.00	\$0.00	2015	3/24/2015	10	SS061140005	1	SMALL BUSINESS

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Vendor Name	Description of Requirement	Action Obligation	Base and All Options Value	Fiscal Year	Date Signed	PO/Delivery Order/Task Order/Call#	Parent Contract	Mod #	Contracting Officers Business Size Selection
KAREN SCHNUTE MD PA	IGF::CL::IGF SCHNUTE - CALL ORDER - CASES EXTEND PERFORMANCE PERIOD	\$0.00	\$0.00	2016	12/16/2015	14	SS061140023	1	SMALL BUSINESS
ALVIN SMITH PHD	IGF::CL::IGF SMITH - CALL ORDER - CASES EXTEND PERFORMANCE PERIOD	\$0.00	\$0.00	2016	12/16/2015	14	SS061140024	3	SMALL BUSINESS
VAN HOOSE, THOMAS A PHD	IGF::CL::IGF VAN HOOSE - CALL ORDER - CASES EXTEND PERFORMANCE PERIOD	\$0.00	\$0.00	2016	12/16/2015	13	SS061140025	2	SMALL BUSINESS
WINSLOW MD, RICHARD S	IGF::CL::IGF WINSLOW, MC, REG. 10	\$0.00	\$0.00	2016	12/14/2015	1	SS10154C011	2	SMALL BUSINESS
WINSLOW MD, RICHARD S	IGF::CL::IGF WINSLOW, MC, REG. 10	\$0.00	\$0.00	2016	12/29/2015	1	SS10154C011	3	SMALL BUSINESS
STATE HEALTH SERVICES, TEXAS DEPARTMENT OF	IGF::CT::IGF CRITICAL FUNCTION TEXAS ACCESS TO ONLINE BIRTH RECORDS	\$51,800.00	\$0.00	2015	8/18/2015	SS011360002		2	OTHER THAN SMALL BUSINESS
STATE HEALTH SERVICES, TEXAS DEPARTMENT OF	IGF::CT::IGF CRITICAL FUNCTION TEXAS ACCESS TO ONLINE BIRTH RECORDS	\$51,800.00	\$0.00	2016	4/21/2016	SS011360002		3	OTHER THAN SMALL BUSINESS
SIGNET TECHNOLOGIES, INC.	IGF::CT::IGF - ENHANCED SERVICE PLAN FOR THE INTEGR	\$0.00	\$0.00	2016	8/15/2016	SS001550198		2	SMALL BUSINESS
SIGNET TECHNOLOGIES, INC.	IGF::CT::IGF - ENHANCED SERVICE PLAN FOR THE INTEGR	\$98,268.00	\$0.00	2016	7/25/2016	SS001550198		1	SMALL BUSINESS
WELCH CONSULTING, LTD	IGF::CT::IGF - EXPERT WITNESS SERVICES TO PROVIDE AS	\$0.00	\$0.00	2017	11/8/2016	SS001461104		9	OTHER THAN SMALL BUSINESS
WELCH CONSULTING, LTD	IGF::CT::IGF - EXPERT WITNESS SERVICES TO PROVIDE AS	\$24,000.00	\$0.00	2015	6/11/2015	SS001461104		3	OTHER THAN SMALL BUSINESS
MICROSOFT CORPORATION SITZ IN REDMOND CORPORATION	IGF::CT::IGF MODIFICATION 0001 TO TASK ORDER 27 AG	\$0.00	\$0.00	2017	11/4/2016		SS001360014	2	OTHER THAN SMALL BUSINESS
MICROSOFT CORPORATION SITZ IN REDMOND CORPORATION	IGF::CT::IGF MODIFICATION 1 IS TO CHANGE THE SECUR	\$0.00	\$0.00	2017	11/4/2016		SS001360014	1	OTHER THAN SMALL BUSINESS
POINT SECURITY, INC.	IGF::CT::IGF - MODIFICATION 1 TO PURCHASE ORDER SSC	\$0.00	\$0.00	2015	1/5/2015	SS001451171		1	SMALL BUSINESS
SCHNEIDER ELECTRIC USA, INC.	IGF::CT::IGF - MODIFICATION 1 TO PURCHASE ORDER SSC	\$0.00	\$0.00	2016	4/6/2016	SS001550276		1	OTHER THAN SMALL BUSINESS
SCHNEIDER ELECTRIC USA, INC.	IGF::CT::IGF - MODIFICATION 2 TO PURCHASE ORDER SSC	\$35,861.72	\$0.00	2016	8/2/2016	SS001550276		2	OTHER THAN SMALL BUSINESS
WELCH CONSULTING, LTD	IGF::CT::IGF EXPERT WITNESS SERVICES	\$0.00	\$0.00	2016	10/15/2015	SS001461104		4	OTHER THAN SMALL BUSINESS
WELCH CONSULTING, LTD	IGF::CT::IGF EXPERT WITNESS SERVICES	\$0.00	\$0.00	2016	1/4/2016	SS001461104		5	OTHER THAN SMALL BUSINESS
WELCH CONSULTING, LTD	IGF::CT::IGF  THE PURPOSE OF THIS BILATERAL MODIFICATION IS TO:  1) MODIFY CLIN 0005 TO REFLECT AS SHOWN HEREIN TO ACKNOWLEDGE THE ADDITION OF SERVICES FROM SPEAKMAN - CONSULTING EXPERT, OPTION PERIOD I; 2) ADD SECTION C1-6, FAR CLAUSE 52.212-4, ALTERNATE I, INADVERTENTLY LEFT OFF BASE AWARD; 3) REVISE SECTION C3-2 TO ACKNOWLEDGE AN UPDATES TO AGENCY SPECIFIC CLAUSE REGARDING FISMA; AND 4) REVISE SECTIONS C3-5, AND C3-11 TO ACKNOWLEDGE A CHANGE IN GOVERNMENT CONTRACTING PERSONNEL.	\$0.00	\$0.00	2016	4/21/2016	SS001461104		6	OTHER THAN SMALL BUSINESS
RGF CONSULTING CORP.	IGF::CT::IGF ATTACHED ASSIGNMENT OF CLAIMS SS00-12-60001, MODIFICATION NUMBER 9	\$0.00	\$0.00	2015	5/12/2015	SS001260001		9	SMALL BUSINESS
RGF CONSULTING CORP.	IGF::CT::IGF LABOR SERVICE CHANGE CONTRACT SPECIALIST "CRITICAL FUNCTION" SS00-12-60001, MODIFICATION NUMBER 8	\$0.00	\$0.00	2015	12/22/2014	SS001260001		8	SMALL BUSINESS
COMPUWARE CORPORATION	IGF::CT::IGF SOLE SOURCE PURCHASE ORDER TO PROVID	\$0.00	\$0.00	2015	3/23/2015	SS001560020		1	OTHER THAN SMALL BUSINESS

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Vendor Name	Description of Requirement	Action Obligation	Base and All Options Value	Fiscal Year	Date Signed	PO/Delivery Order/Task Order/Call#	Parent Contract	Mod #	Contracting Officers Business Size Selection
KEYPOINT GOVERNMENT SOLUTIONS, INC.	IGF::CT::IGF  BACKGROUND INVESTIGATIONS FOR ADMINISTRATIVE LAW JUDGES MOD #1 - TO CHANGE COR AND ALT COR AND CHANGE FORM (ATTACHMENT)	\$0.00	\$0.00	2016	8/12/2016	SS001660026		1	OTHER THAN SMALL BUSINESS
KEYPOINT GOVERNMENT SOLUTIONS, INC.	IGF::CT::IGF  BACKGROUND INVESTIGATIONS FOR ADMINISTRATIVE LAW JUDGES MOD #2 - TO REVISE THE SOW	\$0.00	\$0.00	2016	9/7/2016	SS001660026		2	OTHER THAN SMALL BUSINESS
IRON DATA SOLUTIONS, INC. (DE)	IGF::CT::IGF  CONTRACT SS00-11-60059, TASK ORDER 0062: IRON DATA SOLUTIONS, INC. NATIONAL VENDOR FILE (NVF)SYNCHRONIZATION SUPPORT PHASE II - MODIFICATION 001 TO EXTEND PERIOD OF PERFORMANCE AT NO COST TO EITHER PARTY, PER AUTHORITY OF FAR 52.212-4(C), CHANGES.	\$0.00	\$0.00	2015	3/4/2015	62	SS001160059	1	OTHER THAN SMALL BUSINESS
MICROSOFT CORPORATION SITZ IN REDMOND CORPORATION	IGF::CT::IGF  MOD 04 TO SS00-13-60014 IS TO UPDATE THE FISMA CLAUSE (CLAUSE 2352.204-2).	\$0.00	\$0.00	2015	2/6/2015	SS001360014		4	OTHER THAN SMALL BUSINESS
MICROSOFT CORPORATION SITZ IN REDMOND CORPORATION	IGF::CT::IGF  MODIFICATION 1 TO MICROSOFT TASK ORDER 11 WHICH PROVIDES EXPERT SERVICES TO DEVELOP AN HA AND DR SOLUTION FOR ENTERPRISE MICROSOFT SQL SERVER 2012. THE PURPOSE OF THIS MODIFICATION IS TO EXTEND THE PERIOD OF PERFORMANCE TO ALLOW ADDITIONAL TIME FOR PROPER TESTING OF THE FINAL DELIVERABLES DUE TO DELAYS AT THE START OF THE TASK ORDER.	\$0.00	\$0.00	2015	3/27/2015	11	SS001360014	1	OTHER THAN SMALL BUSINESS
MICROSOFT CORPORATION SITZ IN REDMOND CORPORATION	IGF::CT::IGF  MODIFICATION 5 IS TO EXERCISE OPTION YEAR 2 FROM JULY 8, 2015 - JULY 7 2016 AND TO CHANGE THE CONTRACTING OFFICER FOR THE MICROSOFT CONTRACT.	\$0.00	\$0.00	2015	5/4/2015	SS001360014		5	OTHER THAN SMALL BUSINESS
MICROSOFT CORPORATION SITZ IN REDMOND CORPORATION	IGF::CT::IGF  MODIFICATION 6 IS TO EXERCISE OPTION YEAR 3 FROM JULY 8, 2016 - JULY 7, 2017 OF THE MICROSOFT CONTRACT.	\$0.00	\$0.00	2016	6/2/2016	SS001360014		6	OTHER THAN SMALL BUSINESS
AMERICAN MEDICAL ASSOCIATION	IGF::CT::IGF  AMERICAN MEDICAL ASSOCIATION CODEMANAGER SUBSCRIPTION RENEWAL	\$9,180.00	\$0.00	2015	8/13/2015	SS001451239		1	OTHER THAN SMALL BUSINESS
NEOPOST USA INC.	IGF::CT::IGF  CHANGE COR AND ALTERNATE COR	\$0.00	\$0.00	2016	7/13/2016	SS001550057		3	OTHER THAN SMALL BUSINESS
FACTIVA, INC	IGF::CT::IGF  EXERCISE OPTION YEAR 1 FOR SUBSCRIPTION RENEWAL OF FACTIVA.COM	\$209,789.00	\$0.00	2016	6/29/2016	SS001550153		1	OTHER THAN SMALL BUSINESS
FALON SOURCING SOLUTIONS LLC	IGF::CT::IGF  FUND CONTRACT FOR 1 MONTH	\$75,694.78	\$0.00	2016	12/17/2015	SS001660006		1	SMALL BUSINESS
NATIONAL GRID USA SERVICE COMPANY, INC.	IGF::CT::IGF  GAS UTILITY SERVICE TO THE ADDABBO BUILDING, 155-10 JAMAICA AVE, JAMAICA NY 11432 FROM 08/01/2014 TO 07/31/2015.	\$0.00	\$0.00	2016	3/3/2016	SS021431025	GS00P12BSD0879	2	OTHER THAN SMALL BUSINESS

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Vendor Name	Description of Requirement	Action Obligation	Base and All Options Value	Fiscal Year	Date Signed	PO/Delivery Order/Task Order/Call#	Parent Contract	Mod #	Contracting Officers Business Size Selection
NATIONAL GRID USA SERVICE COMPANY, INC.	IGF::CT::IGF GAS UTILITY SERVICE TO THE ADDABBO BUILDING, 155-10 JAMAICA AVE, JAMAICA NY 11432 FROM 08/01/2015 TO 07/31/2016.	\$0.00	\$0.00	2016	11/25/2015	SS021530007	GS00P12BSD0879	1	OTHER THAN SMALL BUSINESS
TETON DATA SYSTEMS INC	IGF::CT::IGF MODIFICATION TO FULLY FUND TASK ORDER FOR OPTION PERIOD 1 FOR TETON STAT! REF SUBSCRIPTION	\$353,718.75	\$0.00	2016	1/19/2016	SS001550052		3	SMALL BUSINESS
OBERTHUR TECHNOLOGIES OF AMERICA CORP	IGF::CT::IGF MODIFICATION TO CHANGE SOC ON LINE ITEMS FROM 3152 TO 3125.	\$0.00	\$0.00	2016	8/11/2016	SS001650188		1	OTHER THAN SMALL BUSINESS
NATIONAL JOURNAL GROUP INC	IGF::CT::IGF MODIFICATION TO CHANGE THE ASSIGNED PURCHASING AGENT.	\$0.00	\$0.00	2016	11/16/2015	SS001451124		3	OTHER THAN SMALL BUSINESS
COMPU-TECTURE, INC.	IGF::CT::IGF MODIFICATION TO EXERCISE OPTION YEAR 1	\$37,000.00	\$0.00	2015	6/18/2015	SS001451156		2	SMALL BUSINESS
NATIONAL JOURNAL GROUP INC	IGF::CT::IGF MODIFICATION TO EXERCISE OPTION YEAR 1 AND OBLIGATE FUNDING FOR THE NATIONAL JOURNAL DATABASE SUBSCRIPTION	\$38,383.00	\$0.00	2015	5/27/2015	SS001451124		2	OTHER THAN SMALL BUSINESS
WILLIAM S. HEIN & CO., INC.	IGF::CT::IGF MODIFICATION TO EXERCISE OPTION YEAR 1 UNDER PURCHASE ORDER SS00-14-51149	\$40,325.00	\$0.00	2015	5/26/2015	SS001451149		2	SMALL BUSINESS
COMPU-TECTURE, INC.	IGF::CT::IGF MODIFICATION TO EXERCISE OPTION YEAR 2	\$37,000.00	\$0.00	2016	7/14/2016	SS001451156		3	SMALL BUSINESS
WILLIAM S. HEIN & CO., INC.	IGF::CT::IGF MODIFICATION TO EXERCISE OPTION YEAR 2 UNDER PURCHASE ORDER SS00-14-51149	\$42,345.00	\$0.00	2016	4/21/2016	SS001451149		3	SMALL BUSINESS
NATIONAL JOURNAL GROUP INC	IGF::CT::IGF MODIFICATION TO EXERCISE OPTION YEAR 2.	\$41,070.00	\$0.00	2016	4/28/2016	SS001451124		4	OTHER THAN SMALL BUSINESS
FALON SOURCING SOLUTIONS LLC	IGF::CT::IGF MODIFICATION TO FUND REMAINDER OF CONTRACT	\$832,642.58	\$0.00	2016	1/19/2016	SS001660006		2	SMALL BUSINESS
FALON SOURCING SOLUTIONS LLC	IGF::CT::IGF MODIFICATION TO FUND THE REMAINDER OF CONTRACT	\$400,677.42	\$0.00	2016	1/19/2016	SS001660005		2	SMALL BUSINESS
CONSOLIDATED EDISON COMPANY OF NEW YORK, INC.	IGF::CT::IGF PROVIDE ELECTRIC UTILITU TRANSMISSION AND DISTRIBUTION SERVICE AT THE ADDABO FEDERAL BUILDING	\$0.00	\$0.00	2016	5/16/2016	SS021630006	GS00P14BSD1058	1	OTHER THAN SMALL BUSINESS
TETON DATA SYSTEMS INC	IGF::CT::IGF STATIREF SUBSCRIPTION RENEWAL	\$0.00	\$0.00	2015	3/19/2015	SS001550052		1	SMALL BUSINESS
TETON DATA SYSTEMS INC	IGF::CT::IGF TETON STATIREF SUBSCRIPTION RENEWAL, EXERCISE OPTION YEAR 1	\$32,156.25	\$0.00	2016	12/29/2015	SS001550052		2	SMALL BUSINESS
WELCH CONSULTING, LTD	IGF::CT::IGF: EXPERT WITNESS SERVICES	\$0.00	\$0.00	2016	10/16/2015	SS001360024		6	OTHER THAN SMALL BUSINESS
WELCH CONSULTING, LTD	IGF::CT::IGF: EXPERT WITNESS SERVICES MODIFICATION 7 IS BEING ISSUED TO CHANGE THE POINT OF CONTACT INFORMATION .	\$0.00	\$0.00	2016	1/4/2016	SS001360024		7	OTHER THAN SMALL BUSINESS
HENSEL PHELPS SERVICES LLC	IGF::OT::IGF	\$0.00	\$0.00	2016	12/10/2015	SS001461106		7	OTHER THAN SMALL BUSINESS
STATE OF ALABAMA DEPARTMENT OF PUBLIC HEALTH	IGF::OT::IGF OTHER FUNCTIONS DELIVERY ORDER FOR EAB CONTRACT SS00-08-60017 - ALABAMA	\$0.00	\$0.00	2015	5/5/2015	SS001330144	SS000860017	2	OTHER THAN SMALL BUSINESS
STATE OF ALABAMA DEPARTMENT OF PUBLIC HEALTH	IGF::OT::IGF OTHER FUNCTIONS DELIVERY ORDER FOR EAB CONTRACT SS00-08-60017 - ALABAMA	\$0.00	\$0.00	2015	5/14/2015	SS001330444	SS000860017	2	OTHER THAN SMALL BUSINESS
SOUTH DAKOTA, STATE OF	IGF::OT::IGF OTHER FUNCTIONS MODIFICATION CORRECTS THE DUNS NUMBER.	\$0.00	\$0.00	2016	2/2/2016	SS001461079		2	OTHER THAN SMALL BUSINESS

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HEALTH, TENNESSEE DEPT OF	IGF::OT::IGF OTHER FUNCTIONS TN EXERCISE OPTION YEAR 1 ENUMERATION AT BIRTH (EAB) TENNESSEE: THE CONTRACTOR SHALL PROVIDE BIRTH RECORDS FOR THE PURPOSE OF OBTAINING SOCIAL SECURITY NUMBER (SSN) AT BIRTH IN ACCORDANCE WITH THE ATTACHED STATEMENT OF WORK.	\$0.00	\$0.00	2015	6/17/2015	SS001461080		2	OTHER THAN SMALL BUSINESS
HEALTH, TENNESSEE DEPT OF	IGF::OT::IGF OTHER FUNCTIONS TN RECEIPT OF NON-ELECTRONIC DEATH RECORDS FOR OPTION YEAR III PERIOD OF PERFORMANCE JANUARY 1, 2015 - DECEMBER 31, 2015.	\$0.00	\$0.00	2015	6/17/2015		4 SS001260056	1	OTHER THAN SMALL BUSINESS
BOWHEAD PROFESSIONAL SOLUTIONS, LLC	IGF::OT::IGF - EXERCISE OPTION YEAR TWO	\$0.00	\$0.00	2015	6/2/2015	SS001461008		3	SMALL BUSINESS
PARTNERSHIP FOR PUBLIC SERVICE, INC.	IGF::OT::IGF - MEMBERSHIP IN FEDERAL HUMAN CAPITA	\$25,000.00	\$0.00	2015	8/20/2015	SS001451288		1	OTHER THAN SMALL BUSINESS
PARTNERSHIP FOR PUBLIC SERVICE, INC.	IGF::OT::IGF - MEMBERSHIP IN FEDERAL HUMAN CAPITA	\$25,000.00	\$0.00	2016	9/27/2016	SS001451288		2	OTHER THAN SMALL BUSINESS
TCG PROPERTY CORPORATION	IGF::OT::IGF - MODIFICATION 1 TO CONTRACT SS00-15-6	\$132,607.20	\$0.00	2016	1/5/2016	SS001560056		1	SMALL BUSINESS
BOWHEAD PROFESSIONAL SOLUTIONS, LLC	IGF::OT::IGF - MODIFICATION TO ADD AGENCY CLAUSE	\$0.00	\$0.00	2016	5/23/2016	SS001461008		4	SMALL BUSINESS
BOWHEAD PROFESSIONAL SOLUTIONS, LLC	IGF::OT::IGF - MODIFICATION TO EXERCISE OPTION YEAR	\$0.00	\$0.00	2016	5/31/2016	SS001461008		5	SMALL BUSINESS
HENSEL PHELPS SERVICES LLC	IGF::OT::IGF NATIONAL SUPPORT CENTER (NSC) OPERAT	\$0.00	\$0.00	2015	12/8/2014	SS001461106		2	OTHER THAN SMALL BUSINESS
HENSEL PHELPS SERVICES LLC	IGF::OT::IGF NATIONAL SUPPORT CENTER (NSC) OPERAT	\$0.00	\$0.00	2015	5/14/2015	SS001461106		4	OTHER THAN SMALL BUSINESS
HENSEL PHELPS SERVICES LLC	IGF::OT::IGF NATIONAL SUPPORT CENTER (NSC) OPERAT	\$6,360,948.96	\$0.00	2015	7/17/2015	SS001461106		5	OTHER THAN SMALL BUSINESS
HENSEL PHELPS SERVICES LLC	IGF::OT::IGF NATIONAL SUPPORT CENTER (NSC) OPERAT	\$0.00	\$0.00	2016	10/27/2015	SS001461106		6	OTHER THAN SMALL BUSINESS
AVANTGARDE TRANSLATIONS, INC.	IGF::OT::IGF OTHER FUNCTION  THE PURPOSE OF THIS MODIFICATION IS TO CHANGE THE CONTRACTING OFFICER REPRESENTATIVE (COR) FROM VICTORIA RICHARDS TO MARICELA ESQUILIN AND REPLACE THE ALTERNATE (COR) WITH VICTORIA RICHARDS. SEE ATTACHMENT I AND ATTACHMENT II FOR INVOICE CHANGES.  ALL OTHER TERMS AND CONDITIONS REMAIN UNCHANGED.	\$0.00	\$0.00	2017	10/19/2016	SS001260096		10	SMALL BUSINESS
AVANTGARDE TRANSLATIONS, INC.	IGF::OT::IGF OTHER FUNCTION  THE PURPOSE OF THIS MODIFICATION IS TO ADD CLAUSE 2352.204-2 FEDERAL INFORMATION SECURITY MANAGEMENT ACT (FISMA) AND AGENCY PRIVACY MANAGEMENT (DEC 2014). SEE ATTACHMENT.  ALL OTHER TERMS AND CONDITIONS REMAIN UNCHANGED.	\$0.00	\$0.00	2016	3/8/2016	SS001260096		8	SMALL BUSINESS
AVANTGARDE TRANSLATIONS, INC.	IGF::OT::IGF OTHER FUNCTION  THE PURPOSE OF THIS MODIFICATION IS TO EXERCISE OPTION YEAR FOUR PERIOD OF PERFORMANCE 09/30/2016 - 09/29/2017 AND TO INCORPORATE THE WAGE DETERMINATION FOR THE FOREIGN LANGUAGE TRANSLATOR. SEE ATTACHMENT.  ALL OTHER TERMS AND CONDITIONS REMAIN UNCHANGED.	\$0.00	\$0.00	2016	8/4/2016	SS001260096		9	SMALL BUSINESS

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AVANTGARDE TRANSLATIONS, INC.	IGF::OT::IGF OTHER FUNCTION THE PURPOSE OF THIS MODIFICATION IS TO EXERCISE OPTION YEAR THREE AND TO INCORPORATE THE WAGE DETERMINATION FOR THE FOREIGN LANGUAGE TRANSLATOR. SEE ATTACHMENT.  ALL OTHER TERMS AND CONDITIONS REMAIN UNCHANGED.	\$0.00	\$0.00	2015	7/1/2015	SS001260096		7	SMALL BUSINESS
SABREE, INC.	IGF::OT::IGF  CAGE CODE: 4KUQ1  REMOVAL OF CARPET TILE/FLOOR TILE AND REPLACE OF FLOOR TILE PROVIDED BY THE GOVERNMENT IN ROOM G52 ALTMAYER BUILDING. NOTICE TO PROCEED	\$0.00	\$0.00	2015	1/29/2015	SS001530233	SS001461113	1	SMALL BUSINESS
CREATIVE BUSINESS SOLUTIONS, INC.	IGF::OT::IGF  CAGE CODE: 7GN43  EXERCISE OPTION YEAR I. FOR LABOR AND MOVING SERVICE CONTRACT	\$1,424,272.48	\$0.00	2016	7/29/2016	SS001560040		3	SMALL BUSINESS
MICROSOFT CORPORATION SITZ IN REDMOND CORPORATION	IGF::OT::IGF  MOD 02 TO TASK ORDER 10 AGAINST MICROSOFT CONTRACT. THE PURPOSE OF THIS MODIFICATION IS TO PROVIDE ADDITIONAL FUNDING DUE TO THE CONTINUING RESOLUTION.	\$80,263.50	\$0.00	2015	12/19/2014	10	SS001360014	2	OTHER THAN SMALL BUSINESS
MICROSOFT CORPORATION SITZ IN REDMOND CORPORATION	IGF::OT::IGF  MOD 03 TO TASK ORDER 10 AGAINST MICROSOFT CONTRACT. THE PURPOSE OF THIS MODIFICATION IS TO PROVIDE FULL FUNDING DUE TO FY2015 BUDGET PASSAGE.	\$321,054.00	\$0.00	2015	1/14/2015	10	SS001360014	3	OTHER THAN SMALL BUSINESS
CRA INTERNATIONAL, INC.	IGF::OT::IGF ADMINISTRATIVE MODIFICATION TO CHANGE THE CO AND POC.	\$0.00	\$0.00	2016	1/7/2016	SS001560036		6	OTHER THAN SMALL BUSINESS
NATIONAL ACADEMY OF SCIENCES	IGF::OT::IGF CONSENSUS STUDIES TO ASSIST SSA WITH DISABILITY ISSUES - BILATERAL MODIFICATION TO UPDATE THE CONTRACT SPECIALIST AND TO ADD A CLAUSE TO ALLOW FOR THE DESIGNATION OF TASK MANAGERS.	\$0.00	\$0.00	2016	8/22/2016	SS001360048		6	OTHER THAN SMALL BUSINESS
NATIONAL ACADEMY OF SCIENCES	IGF::OT::IGF CONSENSUS STUDIES TO ASSIST SSA WITH DISABILITY ISSUES - MODIFICATION TO UPDATE INDIRECT COST RATES IN THE CONTRACT TO REFLECT CONTRACTOR'S NEGOTIATED FORWARD PRICING RATE AGREEMENT, AND OTHER ADMINISTRATIVE CHANGES.	\$0.00	\$0.00	2016	3/1/2016	SS001360048		5	OTHER THAN SMALL BUSINESS
CRA INTERNATIONAL, INC.	IGF::OT::IGF EXPERT WITNESS CONSULTING SERVICES	\$0.00	\$0.00	2016	10/8/2015	SS001560036		2	OTHER THAN SMALL BUSINESS
CRA INTERNATIONAL, INC.	IGF::OT::IGF EXPERT WITNESS CONSULTING SERVICES	\$0.00	\$0.00	2016	11/20/2015	SS001560036		3	OTHER THAN SMALL BUSINESS
DREAM MANAGEMENT, INC.	IGF::OT::IGF MAKE ADMINISTRATIVE CHANGES TO CONTRACT.	\$0.00	\$0.00	2016	10/1/2015	SS001260085		10	SMALL BUSINESS

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Vendor Name	Description of Requirement	Action Obligation	Base and All Options Value	Fiscal Year	Date Signed	PO/Delivery Order/Task Order/Call#	Parent Contract	Mod #	Contracting Officers Business Size Selection
SKILLTRAN LLC	IGF::OT::IGF MODIFICATION TO ADD FAR CLAUSE 52.217-9 TO PURCHASE ORDER.	\$0.00	\$0.00	2016	10/26/2015	SS001550224		1	OTHER THAN SMALL BUSINESS
BOWHEAD PROFESSIONAL SOLUTIONS, LLC	IGF::OT::IGF - MODIFICATION TO ADD GA EXPENSE TO TRAVEL CLINS	\$0.00	\$0.00	2015	3/31/2015	SS001461008		2	SMALL BUSINESS
SKILLTRAN LLC	IGF::OT::IGF MODIFICATION TO EXERCISE OPTION YEAR I OF OCCUBROWSE SUBSCRIPTION AND OBLIGATE FUNDING FOR THE OPTION YEAR.	\$70,000.00	\$0.00	2016	5/11/2016	SS001550224		3	OTHER THAN SMALL BUSINESS
SKILLTRAN LLC	IGF::OT::IGF MODIFICATION TO EXTEND THE PERIOD OF PERFORMANCE THAT END USERS RECEIVE THE CD-ROM VERSION OF THE OCCUBROWSE SUBSCRIPTION.	\$0.00	\$0.00	2016	12/29/2015	SS001550224		2	OTHER THAN SMALL BUSINESS
DREAM MANAGEMENT, INC.	IGF::OT::IGF SS00-12-60085 EXERCISE OPTION YEAR II	\$0.00	\$0.00	2015	3/18/2015	SS001260085		7	SMALL BUSINESS
NATIONAL ACADEMY OF SCIENCES	IGF::OT::IGF THE PURPOSE OF THIS MODIFICATION IS TO UPDATE AS CLAUSE 2352.232-1 IN ACCORDANCE WITH HANDBOOK TRANSMITTAL 16-13.	\$0.00	\$0.00	2017	11/18/2016	SS001360048		7	OTHER THAN SMALL BUSINESS
CRA INTERNATIONAL, INC.	IGF::OT::IGF UNILATERAL MODIFICATION TO CORRECT TWO (2) CLERICAL ERRORS ON THE FACE OF THE STANDARD FORM 30 (SF-30) FOR MODIFICATION #4:	\$0.00	\$0.00	2016	12/21/2015	SS001560036		5	OTHER THAN SMALL BUSINESS
SABREE, INC.	IGF::OT::IGF EXERCISE OPTION II FOR CLIN 0255 FOR BON	\$0.00	\$0.00	2016	9/9/2016	SS001461113		6	SMALL BUSINESS
NEOPOST USA INC.	IGF::OT::IGF EXERCISE OPTION YEAR FOR STANDARD MA	\$5,634.12	\$0.00	2017	11/28/2016	SS041650003		4	OTHER THAN SMALL BUSINESS
SCHNEIDER ELECTRIC USA, INC.	IGF::OT::IGF EXERCISE OPTION YEAR I  TECHNICAL SUPPORT, PREVENTIVE MAINTENANCE, ON- SITE MAINTENANCE, AND REMOTE DIAGNOSTIC SUPPORT FOR THE SCHNEIDER ELECTRIC POWERLOGIC MONITORING SYSTEM AT THE SOCIAL SECURITY ADMINISTRATIONS SECURITY WEST BUILDING.	\$16,483.36	\$0.00	2016	8/31/2016	SS001550277		1	OTHER THAN SMALL BUSINESS
EATON CORPORATION	IGF::OT::IGF MOD 1 TO ADD COTR AS AN ORDERING OFF	\$0.00	\$0.00	2016	1/13/2016	SS001560064		1	OTHER THAN SMALL BUSINESS
EATON CORPORATION	IGF::OT::IGF MOD 2 TO EXERCISE OPTION YEAR 1.	\$143,959.92	\$0.00	2016	9/12/2016	SS001560064		2	OTHER THAN SMALL BUSINESS
AMERICAN SOCIETY FOR TRAINING AND DEVELOPMENT, INCORPORATED	IGF::OT::IGF OTHER FUNCTION MODIFICATION TO CHANGE THE ASSIGNED PURCHASING AGENT	\$0.00	\$0.00	2015	12/1/2014	SS001451197		1	OTHER THAN SMALL BUSINESS
HEALTH RESEARCH INCORPORATED	IGF::OT::IGF OTHER FUNCTIONS ENUMERATION AT BIRTH - NEW YORK	\$0.00	\$0.00	2015	7/9/2015	SS001330357	SS000860050	2	OTHER THAN SMALL BUSINESS
NEOPOST USA INC.	IGF::OT::IGF STANDARD MAINTENANCE FOR NEOPOST F	\$0.00	\$0.00	2016	8/10/2016	SS041650003		1	OTHER THAN SMALL BUSINESS
FIRE & LIFE SAFETY AMERICA, INC.	IGF::OT::IGF THE PURPOSE OF MODIFICATION 002 IS TO	\$0.00	\$0.00	2016	7/20/2016	SS001650137		2	OTHER THAN SMALL BUSINESS
FIRE & LIFE SAFETY AMERICA, INC.	IGF::OT::IGF THE PURPOSE OF MODIFICATION 003 IS TO	\$0.00	\$0.00	2016	8/19/2016	SS001650137		3	OTHER THAN SMALL BUSINESS
FIRE & LIFE SAFETY AMERICA, INC.	IGF::OT::IGF THE PURPOSE OF THIS PURCHASE ORDER IS	\$0.00	\$0.00	2016	6/24/2016	SS001650137		1	OTHER THAN SMALL BUSINESS
SABREE, INC.	IGF::OT::IGF UPDATE CONTRACT SECTIONS G-2, G-3 AND	\$0.00	\$0.00	2016	3/31/2016	SS001461113		3	SMALL BUSINESS
CREATIVE BUSINESS SOLUTIONS, INC.	IGF::OT::IGF UPDATE CONTRACTORS DUNS INFORMATIO	\$0.00	\$0.00	2015	9/1/2015	SS001560040		1	SMALL BUSINESS
CREATIVE BUSINESS SOLUTIONS, INC.	IGF::OT::IGF UPDATE CONTRACTORS DUNS INFORMATIO	\$0.00	\$0.00	2016	10/16/2015	SS001560040		2	SMALL BUSINESS
SABREE, INC.	IGF::OT::IGF  EXERCISE OPTION YEAR I.  ASBESTOS RENOVATION AND REMOVAL SERVICES AT THE SOCIAL SECURITY ADMINISTRATION'S HEADQUARTERS BUILDINGS AND OUTLYING BUILDINGS LOCATED IN BALTIMORE COUNTY AND BALTIMORE, MD	\$0.00	\$0.00	2015	7/22/2015	SS001461113		2	SMALL BUSINESS



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Vendor Name	Description of Requirement	Action Obligation	Base and All Options Value	Fiscal Year	Date Signed	PO/Delivery Order/Task Order/Call#	Parent Contract	Mod #	Contracting Officers Business Size Selection
OUTTZ, JAMES & ASSOCIATES	IGF::OT::IGF EXPERT WITNESS CONSULTING SERVICES	\$0.00	\$0.00	2016	10/8/2015	SS001560037		1	SMALL BUSINESS
MICROSOFT CORPORATION SITZ IN REDMOND CORPORATION	IGF::OT::IGF MOD 01 TO TASK ORDER 15 AGAINST MICROSOFT CONTRACT TO ADD ADDITIONAL FUNDING DUE TO THE CONTINUING RESOLUTION.	\$131,650.00	\$0.00	2015	12/19/2014	15	SS001360014	1	OTHER THAN SMALL BUSINESS
MICROSOFT CORPORATION SITZ IN REDMOND CORPORATION	IGF::OT::IGF MOD 01 TO TASK ORDER 15 AGAINST MICROSOFT CONTRACT TO PROVIDE FULL FUNDING DUE TO FY2015 BUDGET PASSAGE.	\$1,053,200.00	\$0.00	2015	1/15/2015	15	SS001360014	2	OTHER THAN SMALL BUSINESS
MICROSOFT CORPORATION SITZ IN REDMOND CORPORATION	IGF::OT::IGF MOD 01 TO TO 16 AGAINST MICROSOFT CONTRACT SS00-13-60014. THE PURPOSE OF THIS MODIFICATION IS TO PROVIDE FULL FUNDING DUE TO FY2015 BUDGET PASSAGE.	\$398,444.85	\$0.00	2015	1/15/2015	16	SS001360014	2	OTHER THAN SMALL BUSINESS
MICROSOFT CORPORATION SITZ IN REDMOND CORPORATION	IGF::OT::IGF MOD 01 TO TO 16 AGAINST MICROSOFT CONTRACT SS00-13-60014. THE PURPOSE OF THIS MODIFICATION IS TO PROVIDE ADDITIONAL FUNDING DUE TO THE CONTINUING RESOLUTION.	\$44,271.65	\$0.00	2015	12/19/2014	16	SS001360014	1	OTHER THAN SMALL BUSINESS
MICROSOFT CORPORATION SITZ IN REDMOND CORPORATION	IGF::OT::IGF MOD 3 TO TASK ORDER 15 AGAINST MICROSOFT CONTRACT TO INCORPORATE CHANGES TO THE STATEMENT OF WORK FOR SUBTASK 3.	\$0.00	\$0.00	2015	4/20/2015	15	SS001360014	3	OTHER THAN SMALL BUSINESS
MICROSOFT CORPORATION SITZ IN REDMOND CORPORATION	IGF::OT::IGF MODIFICATION 1 TO TASK ORDER 19 AGAINST MICROSOFT CONTRACT FOR CONTINUING SUPPORT SERVICES FROM MICROSOFT FOR EXCHANGE SOFTWARE. THIS MODIFICATION IS TO UPDATE THE SOW TO REFLECT CHANGES TO SUBTASKS 1 AND 2.	\$0.00	\$0.00	2016	6/1/2016	19	SS001360014	1	OTHER THAN SMALL BUSINESS
BOWHEAD PROFESSIONAL SOLUTIONS, LLC	IGF::OT::IGF MODIFICATION IS TO REVISE AN INSTALLATION DATE.	\$0.00	\$0.00	2015	2/25/2015	SS001530142	SS001461008	3	SMALL BUSINESS
NATIONAL ASSOCIATION FOR PUBLIC HEALTH STATISTICS AND INFORM	IGF::OT::IGF TECHNICAL ASSISTANCE AND TESTING OF STATE ELECTRONIC DEATH REGISTRATION SYSTEMS (EDRS). MODIFICATION CHANGES THE NAME OF THE ADMINISTRATIVE CONTRACT SPECIALIST.	\$0.00	\$0.00	2015	2/27/2015	SS001360047		3	OTHER THAN SMALL BUSINESS
MICROSOFT CORPORATION SITZ IN REDMOND CORPORATION	IGF::OT::IGF THE PURPOSE OF THIS MODIFICATION IS TO FULLY FUND THE ORDER SINCE THE CONTINUING RESOLUTION HAS BEEN LIFTED. TASK ORDER 23 WAS AGAINST MICROSOFT CONTRACT FOR CONTINUING SUPPORT SERVICES FROM MICROSOFT FOR LYNC SERVER 2013 AND SYSTEM CENTER CONFIGURATION MANAGER 2012 SOFTWARE.	\$743,592.00	\$0.00	2016	1/20/2016	23	SS001360014	1	OTHER THAN SMALL BUSINESS

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BOWHEAD PROFESSIONAL SOLUTIONS, LLC	IGF::OT::IGF  THE SOCIAL SECURITY ADMINISTRATION (SSA) HAS A REQUIREMENT FOR CONTRACTOR SERVICES TO SUPPORT OUR AUTOMATED DATA PROCESSING CAPABILITIES AT CLAIMS-TAKING FOREIGN SERVICE POSTS (FSP) SITES.  JUSTIFICATION: THESE SERVICES ARE REQUIRED TO PROVIDE SUPPORT FOR RELOCATIONS (CURRENT BUILDING LOCATION TO ANOTHER BUILDING LOCATION), INSTALLATIONS AND UPGRADES OF INTELLIGENT WORKSTATIONS (IWS) AND LOCAL AREA NETWORK (LAN) COMPONENTS IN VARIOUS FSP SITES. THE SERVICES PROVIDES FOR THE COMPLETE INSTALLATION OF NEW FSP SITES AND TECHNOLOGY REFRESHMENTS AT EXISTING SITES. THE PROJECT WILL BE MULTI-PHASED IN NATURE AND WILL REQUIRE SITE VISITS, INSTALLATION, TRAINING, SHIPPING, AND PROJECT MANAGEMENT.	\$0.00	\$0.00	2015	1/6/2015	SS001530142	SS001461008	2	SMALL BUSINESS
AMERICAN PSYCHOLOGICAL ASSOCIATION, INC.	IGF::OT::IGF APA AMERICAN PSYCHOLOGICAL ASSOCIATION SUBSCRIPTION RENEWAL-OPTION YEAR 1 FOR THE PERIOD OF PERFORMANCE: 10/01/2015-09/30/2015	\$15,525.00	\$0.00	2015	7/22/2015	SS001451203		1	OTHER THAN SMALL BUSINESS
XCEL PROTECTIVE SERVICES, INC.	IGF::OT::IGF ARMED GUARD SERVICES - SECOND SUPPORT CENTER MOD 00001:  THE PURPOSE OF THIS MODIFICATION IS TO AMEND FUNDING INFORMATION ASSIGNED TO CLINS 0002 AND 0003 TO ALLOW FOR TASK ORDER PLACEMENT.	\$0.00	\$0.00	2016	7/13/2016	SS001660027		1	SMALL BUSINESS
XCEL PROTECTIVE SERVICES, INC.	IGF::OT::IGF ARMED GUARD SERVICES - SECOND SUPPORT CENTER MOD 00002:  THE PURPOSE OF THIS MODIFICATION IS TO ADD THE ELECTRONIC INVOICING AND PAYMENT REQUIREMENTS, INTERNET PAYMENT PLATFORM.	\$0.00	\$0.00	2016	8/9/2016	SS001660027		2	SMALL BUSINESS
EMPLOYMENT RESEARCH CORPORATION	IGF::OT::IGF BILATERAL MODIFICATION TO UPDATE THE SECURITY AND PROTECTION LANGUAGE (BASE AWARD ATTACHMENT #3) TO REMOVE THE OUTDATED APPROVED APPLICATIONS LIST.	\$0.00	\$0.00	2016	7/26/2016	SS001660030		1	SMALL BUSINESS
D R MYERS DISTRIBUTING CO	IGF::OT::IGF DOCUTECTOR DIGITAL LIBRARY RESOURCE TO EXERCISE OPTION YEAR TWO.	\$42,540.00	\$0.00	2015	12/18/2014	SS001350021		2	SMALL BUSINESS
EXECUTIVE OFFICE OF THE COMMONWEALTH OF PUERTO RICO	IGF::OT::IGF ELECTRONIC ONLINE VERIFICATION OF PUERTO RICO BIRTH, DEATH, AND MARRIAGE RECORDS. MODIFICATION TO EXERCISE OPTION YEAR 2.	\$75,000.00	\$0.00	2015	8/27/2015	SS021360003		5	OTHER THAN SMALL BUSINESS
EXECUTIVE OFFICE OF THE COMMONWEALTH OF PUERTO RICO	IGF::OT::IGF ELECTRONIC ONLINE VERIFICATION OF PUERTO RICO BIRTH, DEATH, AND MARRIAGE RECORDS. MODIFICATION TO EXERCISE OPTION YEAR 3.	\$75,000.00	\$0.00	2016	7/19/2016	SS021360003		6	OTHER THAN SMALL BUSINESS

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Vendor Name	Description of Requirement	Action Obligation	Base and All Options Value	Fiscal Year	Date Signed	PO/Delivery Order/Task Order/Call#	Parent Contract	Mod #	Contracting Officers Business Size Selection
NATIONAL ASSOCIATION FOR PUBLIC HEALTH STATISTICS AND INFORM	IGF::OT::IGF EVVE CONTRACT	\$429,570.32	\$0.00	2015	9/21/2015	SS001260091		4	OTHER THAN SMALL BUSINESS
PITNEY BOWES INC.	IGF::OT::IGF EXERCISE OPTION 1 TO EXTEND TERM OF CONTRACT	\$705,468.00	\$0.00	2016	6/29/2016	SS001560041		1	OTHER THAN SMALL BUSINESS
NATIONAL ASSOCIATION FOR PUBLIC HEALTH STATISTICS AND INFORM	IGF::OT::IGF EXERCISE OPTION 4 OF CONTRACT	\$0.00	\$0.00	2016	6/30/2016	SS001260091		5	OTHER THAN SMALL BUSINESS
MACROECONOMIC ADVISERS LLC	IGF::OT::IGF EXERCISE OPTION YEAR 1	\$18,600.00	\$0.00	2015	6/3/2015	SS001451231		2	SMALL BUSINESS
MOODY'S ANALYTICS, INC.	IGF::OT::IGF EXERCISE OPTION YEAR 1 UNDER SS00-14-51162 FOR MOODY'S ECONOMY.COM SUBSCRIPTION	\$33,466.00	\$0.00	2015	6/3/2015	SS001451163		3	OTHER THAN SMALL BUSINESS
MOODY'S ANALYTICS, INC.	IGF::OT::IGF EXERCISE OPTION YEAR 2 UNDER SS00-14-51162 FOR MOODY'S ECONOMY.COM SUBSCRIPTION	\$35,139.00	\$0.00	2016	5/17/2016	SS001451163		4	OTHER THAN SMALL BUSINESS
IRON DATA SOLUTIONS, INC. (DE)	IGF::OT::IGF IDIQ CONTRACT SS00-11-60059(IRON DATA SOLUTIONS, INC.)--TASK ORDER 0070 MOD 001: IRON DATA EXTENDED SUPPORT COVERAGE FOR 47 DDS SITES NATIONWIDE. EXTENDED SUPPORT COVERAGE MAKES IRON DATA TECHNICAL SUPPORT AVAILABLE DURING THE HOURS OF 6:00 A.M. TO 8:00 A.M. EST AND 5:00 P.M. TO 10:00 P.M. EST. MOD 001 OBLIGATES ADDITIONAL FUNDS TO FULLY FUND TASK ORDER 0070 THROUGH THE END OF THE PERIOD OF PERFORMANCE.	\$128,309.00	\$0.00	2015	12/30/2014	70 SS001160059		1	OTHER THAN SMALL BUSINESS
DALLAS LIGHTHOUSE FOR THE BLIND, INC.	IGF::OT::IGF MANAGE AND MAINTAIN THE MAIL ROOM AND SUPPLY ROOM AT SSA REGIONAL OFFICE IN DALLAS, TEXAS.	\$74,541.00	\$0.00	2016	4/20/2016	SS061560003		1	OTHER THAN SMALL BUSINESS
NATIONAL LAW ENFORCEMENT TELECOMMUNICATIONS SYSTEMS INC	IGF::OT::IGF MEMBERSHIP TO NATIONAL LAW ENFORCEMENT TELECOMMUNICATIONS SYSTEM (NLETS) FOR HOMELAND SECURITY PRESIDENTIAL DIRECTIVE-12 IDENTITY VERIFICATION - MODIFICATION TO UPDATE THE CLAUSES IN THE CONTRACT DOCUMENT TO ADD THE SECURITY AND SUITABILITY REQUIREMENT CLAUSE.	\$0.00	\$0.00	2016	3/17/2016	SS001350086		7	OTHER THAN SMALL BUSINESS
EASTMAN KODAK COMPANY	IGF::OT::IGF MOD 1 TO PO FOR MAINTENANCE OF TWO KODAK SOCIAL SECURITY CARD PRINTERS AND RELATED SOFTWARE.	\$0.00	\$0.00	2016	1/5/2016	SS001650047		1	OTHER THAN SMALL BUSINESS
NATIONAL LAW ENFORCEMENT TELECOMMUNICATIONS SYSTEMS INC	IGF::OT::IGF MODIFICATION TO ADD ALTERNATE COTR, TANIKA LEE.	\$0.00	\$0.00	2015	9/28/2015	SS001350086		5	OTHER THAN SMALL BUSINESS
AMERICAN PSYCHOLOGICAL ASSOCIATION, INC.	IGF::OT::IGF MODIFICATION TO CHANGE THE ASSIGNED PURCHASING AGENT.	\$0.00	\$0.00	2016	11/12/2015	SS001451203		2	OTHER THAN SMALL BUSINESS
D R MYERS DISTRIBUTING CO	IGF::OT::IGF MODIFICATION TO CHANGE THE ASSIGNED PURCHASING AGENT.	\$0.00	\$0.00	2016	11/9/2015	SS001350021		3	SMALL BUSINESS
NATIONAL LAW ENFORCEMENT TELECOMMUNICATIONS SYSTEMS INC	IGF::OT::IGF MODIFICATION TO CHANGE THE DESIGNATION OF THE PURCHASING AGENT.	\$0.00	\$0.00	2016	11/9/2015	SS001350086		6	OTHER THAN SMALL BUSINESS
EBIX, INC.	IGF::OT::IGF MODIFICATION TO EXERCISE OPTION YEAR 1 UNDER PURCHASE ORDER SS00-14-51153 AND OBLIGATE FUNDING FOR HEALTH ILLUSTRATED ENCYCLOPEDIA SUBSCRIPTION.	\$46,000.00	\$0.00	2015	5/27/2015	SS001451153		2	OTHER THAN SMALL BUSINESS

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Vendor Name	Description of Requirement	Action Obligation	Base and All Options Value	Fiscal Year	Date Signed	PO/Delivery Order/Task Order/Call#	Parent Contract	Mod #	Contracting Officers Business Size Selection
EBIX, INC.	IGF::OT::IGF MODIFICATION TO EXERCISE OPTION YEAR 1 UNDER PURCHASE ORDER SS00-14-51153 AND OBLIGATE FUNDING FOR HEALTH ILLUSTRATED ENCYCLOPEDIA SUBSCRIPTION.	\$46,000.00	\$0.00	2016	4/21/2016	SS001451153		3	OTHER THAN SMALL BUSINESS
AMERICAN PSYCHOLOGICAL ASSOCIATION, INC.	IGF::OT::IGF MODIFICATION TO EXERCISE OPTION YEAR 2.	\$16,146.00	\$0.00	2016	4/21/2016	SS001451203		3	OTHER THAN SMALL BUSINESS
HEALTHEWAY, INC.	IGF::OT::IGF MODIFICATION TO EXERCISE OPTION YEAR FOR THE EHEALTH EXCHANGE	\$118,000.00	\$0.00	2015	3/20/2015	SS001360012		3	OTHER THAN SMALL BUSINESS
MACROECONOMIC ADVISERS LLC	IGF::OT::IGF MODIFICATION TO EXERCISE OPTION YEAR II OF THE EXECUTIVE FORECAST SERVICE SUBSCRIPTION	\$19,350.00	\$0.00	2016	5/4/2016	SS001451231		3	SMALL BUSINESS
HEALTHEWAY, INC.	IGF::OT::IGF MODIFICATION TO EXERCISE OPTION YEAR THREE FOR THE EHEALTH EXCHANGE	\$63,000.00	\$0.00	2016	3/25/2016	SS001360012		4	OTHER THAN SMALL BUSINESS
NATIONAL LAW ENFORCEMENT TELECOMMUNICATIONS SYSTEMS INC	IGF::OT::IGF MODIFICATION TO EXERCISE OPTION YEAR THREE FROM MAY 1, 2015 THROUGH APRIL 30, 2016.	\$48,000.00	\$0.00	2015	3/2/2015	SS001350086		4	OTHER THAN SMALL BUSINESS
NATIONAL LAW ENFORCEMENT TELECOMMUNICATIONS SYSTEMS INC	IGF::OT::IGF MODIFICATION TO EXERCISE OPTION YEAR THREE FROM MAY 1, 2016 THROUGH APRIL 30, 2017.	\$48,000.00	\$0.00	2016	3/24/2016	SS001350086		8	OTHER THAN SMALL BUSINESS
COMMFED SOLUTIONS, INC	IGF::OT::IGF NOTICE TO PROCEED  REMOVAL OF THE YORK ABSORPTION CHILLER UNIT FROM THE NCC UTILITY BUILDING	\$0.00	\$0.00	2015	2/10/2015	SS001461119		1	SMALL BUSINESS
NATIONAL ACADEMY OF SCIENCES	IGF::OT::IGF TASK ORDER 0007 IS A COST REIMBURSEMENT TASK ORDER FOR THE NATIONAL ACADEMY OF SCIENCES TO FORM A CONSENSUS COMMITTEE TO PROVIDE FINDINGS AND CONCLUSIONS ON IMPROVING HEALTH OUTCOMES FOR CHILDREN WITH DISABILITIES. THIS IS A MODIFICATION TO CORRECT THE DELIVERABLE DUE DATE.	\$0.00	\$0.00	2016	6/15/2016	7 SS001360048		1	OTHER THAN SMALL BUSINESS
NATIONAL ASSOCIATION FOR PUBLIC HEALTH STATISTICS AND INFORM	IGF::OT::IGF TESTING AND TECHNICAL ASSISTANCE FOR STATES IMPLEMENTING ELECTRONIC DEATH REGISTRATION SYSTEMS. THE PURPOSE OF THIS MODIFICATION IS TO CHANGE THE CONTRACTING OFFICER TECHNICAL REPRESENTATIVE (COTR), AND ALTERNATE COTR.	\$0.00	\$0.00	2016	8/10/2016	SS001660002		1	OTHER THAN SMALL BUSINESS
NATIONAL ASSOCIATION FOR PUBLIC HEALTH STATISTICS AND INFORM	IGF::OT::IGF TESTING AND TECHNICAL ASSISTANCE FOR STATES IMPLEMENTING ELECTRONIC DEATH REGISTRATION SYSTEMS. THE PURPOSE OF THIS MODIFICATION IS TO EXERCISE OPTION YEAR ONE (CONTRACT YEAR 2) BEGINNING OCTOBER 26, 2016 THROUGH OCTOBER 25, 2017.	\$0.00	\$0.00	2017	10/24/2016	SS001660002		2	OTHER THAN SMALL BUSINESS
OUTTZ, JAMES & ASSOCIATES	IGF::OT::IGF THE PURPOSE OF THIS ADMINISTRATIVE MODIFICATION IS TO CHANGE THE CONTRACTING OFFICER'S CONTACT INFORMATION LISTED IN THE CONTRACT.	\$0.00	\$0.00	2016	12/23/2015	SS001560037		2	SMALL BUSINESS
CAMPION SERVICES INC	IGF::OT::IGF THE PURPOSE OF THIS MODIFICATION IS TO UPDATE AS CLAUSE 2352.232-1 IN ACCORDANCE WITH HANDBOOK TRANSMITTAL 16-13.	\$0.00	\$0.00	2017	11/18/2016	SS001650106		1	SMALL BUSINESS

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Vendor Name	Description of Requirement	Action Obligation	Base and All Options Value	Fiscal Year	Date Signed	PO/Delivery Order/Task Order/Call#	Parent Contract	Mod #	Contracting Officers Business Size Selection
CRA INTERNATIONAL, INC.	IGF::OT::IGF THE PURPOSE OF THIS MODIFICATION IS TO UPDATE AS CLAUSE 2352.232-1 IN ACCORDANCE WITH HANDBOOK TRANSMITTAL 16-13.	\$0.00	\$0.00	2017	11/17/2016	SS001560036		8	OTHER THAN SMALL BUSINESS
SHUTTERSTOCK, INC.	IGF::OT::IGF THIS IS A VIDEO DOWNLOAD SOFTWARE THAT WILL HELP MEET THE ACTING COMMISSIONERS GOAL TO GET MORE COMMUNICATION TO EMPLOYEES. WE USE THIS SOFTWARE FOR INTERNAL AND EXTERNAL VIDEOS	\$0.00	\$0.00	2016	12/7/2015	SS001550288		1	OTHER THAN SMALL BUSINESS
EMPLOYMENT RESEARCH CORPORATION	IGF::OT::IGF UNILATERAL MODIFICATION TO UPDATE AS CLAUSE 2352.232-1 IN ACCORDANCE WITH HANDBOOK TRANSMITTAL 16-13.	\$0.00	\$0.00	2017	11/7/2016	SS001660030		2	SMALL BUSINESS
THOMSON REUTERS (PROFESSIONAL) UK LTD	IGF::OT::IGF WECOMPLY TRAINING SUBSCRIPTION CONTAINING A FULL ETHICS AND COMPLIANCE LIBRARY.	\$0.00	\$0.00	2016	12/22/2015	SS001550232		1	OTHER THAN SMALL BUSINESS
IMAGING SOLUTIONS, INC	IGF::OT::IGF: MODIFICATION TO CHANGE FORM OF PAYM	\$0.00	\$0.00	2015	7/15/2015	SS001451255		1	SMALL BUSINESS
WORKFORCE DEVELOPMENT, IOWA	IOWA WORKFORCE DEVELOPMENT (IWD) - EXERCISE OPTION YEAR FOUR N/A PRIOR 03/01/2012	\$7,200.00	\$0.00	2015	5/6/2015	SS071150008		4	OTHER THAN SMALL BUSINESS
COMPUTER MANAGEMENT SCIENCES INC	MAINTAIN COMPUTER MANAGEMENT SCIENCES CPXEP	\$0.00	\$0.00	2016	6/2/2016	SS001651006		2	OTHER THAN SMALL BUSINESS
COMPUTER MANAGEMENT SCIENCES INC	MAINTAIN COMPUTER MANAGEMENT SCIENCES CPXEP	\$0.00	\$0.00	2016	6/14/2016	SS001651006		3	OTHER THAN SMALL BUSINESS
COMPUTER MANAGEMENT SCIENCES INC	MAINTAIN COMPUTER MANAGEMENT SCIENCES CPXEP	\$23,333.34	\$0.00	2017	10/14/2016	SS001651006		4	OTHER THAN SMALL BUSINESS
OPEX CORPORATION	MAINTENANCE CONTRACT FOR OPEX MODEL PS51/OMATION 306 LETTER OPENER IGF::OT::IGF OTHER FUNCTIONS	\$8,265.56	\$0.00	2015	8/4/2015	SS031450006		3	OTHER THAN SMALL BUSINESS
PHOENIX SOFTWARE INTERNATIONAL, INC.	MAINTENANCE ON PHOENIX SOFTWARE PRODUCTS; (E)	\$0.00	\$0.00	2015	5/11/2015	SS001560023		1	OTHER THAN SMALL BUSINESS
ROCKET SOFTWARE, INC.	MAINTENANCE ON ROCKET DASD SOFTWARE AND ROCK	\$0.00	\$0.00	2015	4/29/2015	SS001550025		2	OTHER THAN SMALL BUSINESS
HELP/SYSTEMS, LLC	MAINTENANCE RENEWAL- ISERIES AUDIT AND VULNERA	\$0.00	\$0.00	2016	12/7/2015	SS001550015		2	OTHER THAN SMALL BUSINESS
PECO ENERGY COMPANY	MATSSC/UTILITIES (ELECTRIC/WATER/GAS) IGF::OT::IGF OTHER FUNCTIONS	\$0.00	\$0.00	2015	1/6/2015	SS031431005	GS00P06BSD0447	1	OTHER THAN SMALL BUSINESS
PHILADELPHIA, CITY OF- WATER DEPARTMENT	MATSSC/UTILITIES (ELECTRIC/WATER/GAS) IGF::OT::IGF OTHER FUNCTIONS	\$0.00	\$0.00	2015	1/8/2015	SS031451012		1	OTHER THAN SMALL BUSINESS
PHILADELPHIA, CITY OF	MATSSC/UTILITIES (ELECTRIC/WATER/GAS) IGF::OT::IGF OTHER FUNCTIONS	\$0.00	\$0.00	2015	1/8/2015	SS031431003	GS00P08BSD0546	1	OTHER THAN SMALL BUSINESS
PHILADELPHIA, CITY OF	MATSSC/UTILITIES (ELECTRIC/WATER/GAS) IGF::OT::IGF OTHER FUNCTIONS	\$0.00	\$0.00	2015	5/19/2015	SS031431003	GS00P08BSD0546	2	OTHER THAN SMALL BUSINESS
ARCHIE S GOLDEN MD	MEDICAL CONSULTANT CONTRACTORS BLANKET PURCHASE AGREEMENT IGF::CT::IGF	\$0.00	\$0.00	2015	5/29/2015	6 SS001140139		1	SMALL BUSINESS
PIRKLE JR, QUENTIN ROOSEVELT	MEDICAL CONSULTANT SERVICES - INITIAL ORIENTATION IGF::CL::IGF	\$0.00	\$0.00	2015	6/25/2015	1 SS041540001		1	SMALL BUSINESS
COYLE PHD, ROBERT T	MEDICAL CONSULTANT SERVICES - MENTAL CASES CLOSELY ASSOCIATED TO INHERENTLY GOVERNMENTAL FUNCTION IGF::CL::IGF	\$0.00	\$0.00	2015	12/16/2014	9 SS041140068		1	SMALL BUSINESS
PETZELT, JOHN	MEDICAL CONSULTANT SERVICES - MENTAL CASES CLOSELY ASSOCIATED TO INHERENTLY GOVERNMENTAL FUNCTION IGF::CL::IGF	\$0.00	\$0.00	2015	7/6/2015	12 SS041140069		2	SMALL BUSINESS

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CROSS III, GEORGE LEE MD	MEDICAL CONSULTANT SERVICES - PHYSICAL CASES + NON-CASE SERVICES CLOSELY ASSOCIATED TO INHERENTLY GOVERNMENTAL FUNCTION IGF::CL::IGF	\$0.00	\$0.00	2015	12/15/2014	18	SS041140050	1	SMALL BUSINESS
CROSS III, GEORGE LEE MD	MEDICAL CONSULTANT SERVICES - PHYSICAL CASES + NON-CASE SERVICES CLOSELY ASSOCIATED TO INHERENTLY GOVERNMENTAL FUNCTION IGF::CL::IGF	\$0.00	\$0.00	2015	6/24/2015	21	SS041140050	1	SMALL BUSINESS
CALLINS, W PAUL MD	MEDICAL CONSULTANT SERVICES - PHYSICAL CASES CLOSELY ASSOCIATED TO INHERENTLY GOVERNMENTAL FUNCTION IGF::CL::IGF	\$0.00	\$0.00	2015	4/27/2015	16	SS041040093	1	SMALL BUSINESS
HARPER, JOHN T	MEDICAL CONSULTANT SERVICES - PHYSICAL CASES CLOSELY ASSOCIATED TO INHERENTLY GOVERNMENTAL FUNCTION IGF::CL::IGF	\$0.00	\$0.00	2015	12/11/2014	10	SS041140051	2	SMALL BUSINESS
HARRIS M.D., MAURICE	MEDICAL CONSULTANT SERVICES - PHYSICAL CASES CLOSELY ASSOCIATED TO INHERENTLY GOVERNMENTAL FUNCTION IGF::CL::IGF	\$0.00	\$0.00	2015	12/15/2014	11	SS041140036	1	SMALL BUSINESS
CHELTON MD MPH, LOUIS	MEDICAL CONSULTANT SERVICES - PHYSICAL CASES CLOSELY ASSOCIATED TO INHERENTLY GOVERNMENTAL FUNCTION IGF::CL::IGF FOR CLOSELY ASSOCIATED	\$0.00	\$0.00	2015	12/11/2014	11	SS041140044	1	SMALL BUSINESS
RICHARD T THIO MD	MEDICAL CONSULTANT SERVICES - PHYSICAL CASES CLOSELY ASSOCIATED TO INHERENTLY GOVERNMENTAL FUNCTION IGF::CL::IGF FOR CLOSELY ASSOCIATED	\$0.00	\$0.00	2015	12/15/2014	14	SS041140058	1	SMALL BUSINESS
TURNER, MARCIA	MEDICAL CONSULTANT SERVICES - PHYSICAL CASES CLOSELY ASSOCIATED TO INHERENTLY GOVERNMENTAL FUNCTION IGF::CL::IGF FOR CLOSELY ASSOCIATED	\$0.00	\$0.00	2015	12/15/2014	12	SS041140046	1	SMALL BUSINESS
MAUREEN DINGES DR	MEDICAL CONSULTANT SERVICES - PHYSICAL MED SPEECH/LANGUAGE IGF::CL::IGF	\$0.00	\$0.00	2015	12/15/2014	17	SS041140057	1	SMALL BUSINESS
THOMSON, THOMAS	MEDICAL CONSULTANTS CONTRACTS - PHYSICAL CASES CLOSELY ASSOCIATED TO INHERENTLY GOVERNMENTAL FUNCTION IGF::CL::IGF	\$0.00	\$0.00	2015	4/1/2015	12	SS041140027	1	SMALL BUSINESS
LINA B CALDWELL, MD	MEDICAL CONTRACTING SERVICES - PHYSICAL CASES CLOSELY ASSOCIATED TO INHERENTLY GOVERNMENTAL FUNCTION IGF::CL::IGF	\$0.00	\$0.00	2015	12/11/2014	15	SS041140039	1	SMALL BUSINESS
MARK GILSON, PH.D., P.C.	MEDICAL CONTRACTOR SERVICES - MENTAL CASES CLOSELY ASSOCIATED TO INHERENTLY GOVERNMENTAL FUNCTION IGF::CL::IGF	\$0.00	\$0.00	2015	12/16/2014	12	SS041140063	1	SMALL BUSINESS

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H. RUDOLPH WARREN, M.D., P.C.	MEDICAL CONTRACTOR SERVICES - MENTAL CASES CLOSELY ASSOCIATED TO INHERENTLY GOVERNMENTAL FUNCTION IGF::CL::IGF	\$0.00	\$0.00	2015	12/18/2014	11	SS041140062	2	SMALL BUSINESS
VANDERPLATE, CALVIN	MEDICAL CONTRACTOR SERVICES - MENTAL CASES CLOSELY ASSOCIATED TO INHERENTLY GOVERNMENTAL FUNCTION IGF::CL::IGF	\$0.00	\$0.00	2015	12/17/2014	13	SS041140065	2	SMALL BUSINESS
BROOKS-WARREN M. D., JUANITA ANNETTE	MEDICAL CONTRACTOR SERVICES - MENTAL CASES CLOSLEY ASSOCIATED TO INHERENTLY GOVERNMENTAL FUNCTION IGF::CL::IGF	\$0.00	\$0.00	2015	12/16/2014	14	SS041040087	5	SMALL BUSINESS
JOSEPH COOLS	MEDICAL SERVICE CONSULTANT JOSEPH COOLS, PH.D. IGF::CL::IGF	\$0.00	\$0.00	2016	6/22/2016	1	SS05164C007	1	SMALL BUSINESS
ALLIED HEALTH CARE SERVICES	MOD 28 CLEANING REQUIREMENTS HOURS FOR FITNESS	\$0.00	\$0.00	2015	12/1/2014	SS000860128		28	OTHER THAN SMALL BUSINESS
ALLIED HEALTH CARE SERVICES	MOD 29 ADMIN MOD TO ADD REQUISITION TO MOD 004	\$0.00	\$0.00	2015	3/4/2015	SS000860128		29	OTHER THAN SMALL BUSINESS
ALLIED HEALTH CARE SERVICES	MOD 33 EXERCISE FOLLOW-ON YEAR VIII.	\$2,111,081.64	\$0.00	2016	6/30/2016	SS000860128		33	OTHER THAN SMALL BUSINESS
FUTRON INC	MOD TO CHANGE POP	\$0.00	\$0.00	2016	12/16/2015	SS001530904	GS35F5400H	1	SMALL BUSINESS
FUTRON INC	MOD TO CHANGE SOW	\$0.00	\$0.00	2016	2/23/2016	SS001530904	GS35F5400H	2	SMALL BUSINESS
TCG PROPERTY CORPORATION	MODIFICATION 1 TO CONTRACT SS00-15-60056 FOR MECHANICAL MAINTENANCE, CUSTODIAL, AND TRASH SORTING SERVICES AT THE SOCIAL SECURITY ADMINISTRATION SECURITY WEST BUILDING IN BALTIMORE, MD. THE PURPOSE OF THIS MODIFICATION IS TO FULLY FUND LINE ITEMS 0002 AND 0003.								
COMPUWARE CORPORATION	SERVICE CONTRACT FUNCTION TYPE = IGF::CT::IGF	\$129,755.28	\$0.00	2017	11/3/2016	SS001660039		1	SMALL BUSINESS
COMPUWARE CORPORATION	MODIFICATION IS TO EXERCISE OPTION YEAR 4 FROM 09	\$11,400,000.00	\$0.00	2015	8/17/2015	SS001160060		6	OTHER THAN SMALL BUSINESS
COMPUWARE CORPORATION	MODIFICATION IS TO EXERCISE OPTION YEAR 5 FROM 09	\$11,400,000.00	\$0.00	2016	7/26/2016	SS001160060		8	OTHER THAN SMALL BUSINESS
COMPUWARE CORPORATION	MODIFICATION TO CHANGE COTR	\$0.00	\$0.00	2015	3/4/2015	SS001160060		5	OTHER THAN SMALL BUSINESS
LOOK SOFTWARE PTY. LTD.	MODIFICATION TO CHANGE COTR	\$0.00	\$0.00	2015	6/1/2015	SS001560033		1	OTHER THAN SMALL BUSINESS
ASSOCIATION FOR COMPUTING MACHINERY, INC.	MODIFICATION TO CHANGE THE ASSIGNED PURCHASING	\$0.00	\$0.00	2016	11/12/2015	SS001350132		3	OTHER THAN SMALL BUSINESS
BMJ PUBLISHING GROUP LTD	MODIFICATION TO CHANGE THE ASSIGNED PURCHASING	\$0.00	\$0.00	2016	11/16/2015	SS001451140		3	OTHER THAN SMALL BUSINESS
CONQUEST SYSTEMS, INC.	MODIFICATION TO CHANGE THE ASSIGNED PURCHASING	\$0.00	\$0.00	2016	11/20/2015	SS001550088		1	SMALL BUSINESS
ELSEVIER INC.	MODIFICATION TO CHANGE THE ASSIGNED PURCHASING	\$0.00	\$0.00	2016	11/16/2015	SS001451194		2	OTHER THAN SMALL BUSINESS
PDR EQUITY, LLC	MODIFICATION TO CHANGE THE ASSIGNED PURCHASING	\$0.00	\$0.00	2015	12/1/2014	SS001451202		1	SMALL BUSINESS
ROUBINI GLOBAL ECONOMICS, LLC	MODIFICATION TO CHANGE THE ASSIGNED PURCHASING	\$0.00	\$0.00	2015	12/1/2014	SS001451193		1	OTHER THAN SMALL BUSINESS
NATIONAL ACADEMY OF SCIENCES	MODIFICATION TO CLARIFY LANGUAGE - TASK ORDER 0002 TO EVALUATE THE SUPPLEMENTAL SECURITY INCOME (SSI) DISABILITY PROGRAM FOR CHILDREN WITH MENTAL DISORDERS IGF::OT::IGF	\$0.00	\$0.00	2015	5/19/2015	2	SS001360048	6	OTHER THAN SMALL BUSINESS
INFOGIX, INC.	MODIFICATION TO EXERCISE OPTION 3 TO THE CONTRAC	\$405,585.00	\$0.00	2015	5/20/2015	SS001260078		6	SMALL BUSINESS
IMMIXTECHNOLOGY, INC.	MODIFICATION TO EXERCISE OPTION II, RENEWAL OF THE	\$261,880.97	\$0.00	2015	7/15/2015	SS001360026		3	OTHER THAN SMALL BUSINESS
IMMIXTECHNOLOGY, INC.	MODIFICATION TO EXERCISE OPTION III, RENEWAL OF TI	\$269,737.39	\$0.00	2016	7/14/2016	SS001360026		4	OTHER THAN SMALL BUSINESS
MAZDA COMPUTER CORPORATION	MODIFICATION TO EXERCISE OPTION PERIOD I FOR THE #	\$216,000.00	\$0.00	2016	7/28/2016	SS001560044		2	OTHER THAN SMALL BUSINESS
ELSEVIER INC.	MODIFICATION TO EXERCISE OPTION YEAR 1 - ANNUAL S	\$3,969.00	\$0.00	2015	6/29/2015	SS001451194		1	OTHER THAN SMALL BUSINESS
SKILLTRAN LLC	MODIFICATION TO EXERCISE OPTION YEAR 1 UNDER PUR	\$9,834.00	\$0.00	2015	5/27/2015	SS001451186		2	SMALL BUSINESS
ROUBINI GLOBAL ECONOMICS, LLC	MODIFICATION TO EXERCISE OPTION YEAR 1 UNDER PUR	\$15,333.33	\$0.00	2015	5/27/2015	SS001451193		2	OTHER THAN SMALL BUSINESS
PDR EQUITY, LLC	MODIFICATION TO EXERCISE OPTION YEAR 1-ANNUAL SU	\$5,840.00	\$0.00	2015	7/13/2015	SS001451202		2	SMALL BUSINESS
ELSEVIER INC.	MODIFICATION TO EXERCISE OPTION YEAR 2	\$4,138.00	\$0.00	2016	6/17/2016	SS001451194		3	OTHER THAN SMALL BUSINESS
ASSOCIATION FOR COMPUTING MACHINERY, INC.	MODIFICATION TO EXERCISE OPTION YEAR 2- ANNUAL S	\$16,823.92	\$0.00	2015	7/14/2015	SS001350132		2	OTHER THAN SMALL BUSINESS
ROUBINI GLOBAL ECONOMICS, LLC	MODIFICATION TO EXERCISE OPTION YEAR 2 UNDER PUR	\$15,333.33	\$0.00	2016	9/16/2016	SS001451193		3	OTHER THAN SMALL BUSINESS
BMJ PUBLISHING GROUP LTD	MODIFICATION TO EXERCISE OPTION YEAR 2.	\$6,610.00	\$0.00	2016	5/16/2016	SS001451140		4	OTHER THAN SMALL BUSINESS
PDR EQUITY, LLC	MODIFICATION TO EXERCISE OPTION YEAR 2-ANNUAL SU	\$6,275.00	\$0.00	2016	4/21/2016	SS001451202		3	SMALL BUSINESS

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SKILLTRAN LLC	MODIFICATION TO EXERCISE OPTION YEAR II UNDER PUR	\$9,834.00	\$0.00	2016	5/11/2016	SS001451186		3	SMALL BUSINESS
ROUBINI GLOBAL ECONOMICS, LLC	MODIFICATION TO UPDATE THE CONTRACTORS DUNS N	\$0.00	\$0.00	2017	11/2/2016	SS001451193		4	OTHER THAN SMALL BUSINESS
MOTION PICTURE LICENSING CORPORATION	MOTION PICTURE LICENSING CORPORATION UMBRELLA	\$90,250.00	\$0.00	2016	1/27/2016	SS001550068		1	SMALL BUSINESS
NASATKA BARRIER, INCORPORATED	NASATKA VEHICLE CRASH BARRIERS AT THE NCC - MAINTENANCE, INSPECTION AND EMERGENCY REPAIRS ONE-YEAR BASE PERIOD PLUS FOUR ONE-YEAR OPTION PERIODS IGF::CT::IGF	\$0.00	\$0.00	2015	4/24/2015	SS001451234		1	SMALL BUSINESS
NASATKA BARRIER, INCORPORATED	NASATKA VEHICLE CRASH BARRIERS AT THE NCC - MAINTENANCE, INSPECTION AND EMERGENCY REPAIRS ONE-YEAR BASE PERIOD PLUS FOUR ONE-YEAR OPTION PERIODS IGF::CT::IGF	\$23,572.00	\$0.00	2015	7/28/2015	SS001451234		2	SMALL BUSINESS
NASATKA BARRIER, INCORPORATED	NASATKA VEHICLE CRASH BARRIERS AT THE NCC - MAINTENANCE, INSPECTION AND EMERGENCY REPAIRS ONE-YEAR BASE PERIOD PLUS FOUR ONE-YEAR OPTION PERIODS IGF::CT::IGF	\$23,932.00	\$0.00	2016	8/11/2016	SS001451234		3	SMALL BUSINESS
MASSACHUSETTS MEDICAL SOCIETY	NEW ENGLAND JOURNAL OF MEDICINE (NEJM) RENEWAL.  MODIFICATION TO PURCHASE ORDER SS00-15-50034 IS TO CHANGE THE APPROPRIATION CODE FROM FISCAL YEAR 2014 TO A FISCAL YEAR APPROPRIATION 2015 CODE.	\$0.00	\$0.00	2015	3/19/2015	SS001550034		1	OTHER THAN SMALL BUSINESS
NIELSEN COMPANY US LLC, THE	NIELSEN PRIMELOCATION WEB AND DESKTOP SOFTWARE	\$233,318.25	\$0.00	2015	12/23/2014	SS001461011		6	OTHER THAN SMALL BUSINESS
NIELSEN COMPANY US LLC, THE	NIELSEN PRIMELOCATION WEB AND DESKTOP SOFTWARE	\$318,174.00	\$0.00	2016	10/1/2015	SS001461011		7	OTHER THAN SMALL BUSINESS
NIELSEN COMPANY US LLC, THE	NIELSEN PRIMELOCATION WEB AND DESKTOP SOFTWARE	\$325,469.00	\$0.00	2017	10/1/2016	SS001461011		8	OTHER THAN SMALL BUSINESS
NIELSEN COMPANY (US), LLC, THE	NIELSEN PRIMELOCATION WEB AND DESKTOP SOFTWARE	\$0.00	\$0.00	2017	11/4/2016	SS001461011		9	OTHER THAN SMALL BUSINESS
NATIONAL ACADEMY OF SCIENCES	NO COST EXTENSION - TASK ORDER TO EVALUATE THE SUPPLEMENTAL SECURITY INCOME (SSI) DISABILITY PROGRAM FOR CHILDREN WITH MENTAL DISORDERS IGF::OT::IGF	\$0.00	\$0.00	2015	3/26/2015		2 SS001360048	5	OTHER THAN SMALL BUSINESS
PUBLIC HEALTH, CONNECTICUT DEPARTMENT OF	NON-ELECTRONIC DEATH REGISTRATION - CONNECTICUT THE PURPOSE OF MODIFICATION NUMBER 4 IS TO EXERCISE OPTION YEAR THREE TO EXTEND THE TERM OF THE CONTRACT FROM JANUARY 1, 2015 THROUGH DECEMBER 31, 2015 FOR RECEIPT OF NON-ELECTRONIC DEATH RECORDS.	\$0.00	\$0.00	2015	12/18/2014	SS001260017		4	OTHER THAN SMALL BUSINESS
HEALTH, MISSISSIPPI STATE DEPARTMENT OF	NON-ELECTRONIC DEATH REGISTRATION - MISSISSIPPI THE PURPOSE OF MODIFICATION NUMBER 4 IS TO EXERCISE OPTION YEAR THREE TO EXTEND THE TERM OF THE CONTRACT FROM JANUARY 1, 2015 THROUGH DECEMBER 31, 2015 FOR RECEIPT OF DEATH RECORDS.	\$0.00	\$0.00	2015	12/18/2014	SS001260025		4	OTHER THAN SMALL BUSINESS
CINCOM SYSTEMS, INC.	OPTION YEAR 3 MAINTENANCE ON CINCOM SW CONTRA	\$442,279.00	\$0.00	2016	10/2/2015	SS001360033		6	OTHER THAN SMALL BUSINESS
CINCOM SYSTEMS, INC.	OPTION YEAR 3 MAINTENANCE ON CINCOM SW CONTRA	\$884,558.00	\$0.00	2016	1/21/2016	SS001360033		7	OTHER THAN SMALL BUSINESS
CINCOM SYSTEMS, INC.	OPTION YEAR 4 MAINTENANCE ON CINCOM SW CONTRA	\$339,006.75	\$0.00	2017	10/1/2016	SS001360033		8	OTHER THAN SMALL BUSINESS
PDFTRON SYSTEMS INC	PDFNET LICENSES FOR DCE-FECS	\$0.00	\$0.00	2016	12/21/2015	SS001550263		1	OTHER THAN SMALL BUSINESS
HERMAN MILLER, INC.	PONCE, PR DO #CA272 PRODUCT AND SERVICESFOR REQ	\$0.00	\$0.00	2016	6/17/2016	SS001630134	SS001260003	1	OTHER THAN SMALL BUSINESS



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HEALTH AND HOSPITALS, LOUISIANA DEPARTMENT OF	REGISTRATION LOUISIANA THE PURPOSE OF MODIFICATION NUMBER 6 IS TO EXERCISE OPTION YEAR IV TO EXTEND THE TERM OF THE CONTRACT FROM JANUARY 1, 2016 THROUGH DECEMBER 31, 2016 FOR RECEIPT OF ELECTRONIC DEATH RECORDS.	\$0.00	\$0.00	2016	11/5/2015	SS001260062		6	OTHER THAN SMALL BUSINESS
ADMIRAL ELEVATOR COMPANY, INC.	REMOTE MONITORING OF ELEVATORS AND ESCALATORS AT SSA HEADQUARTERS IGF::OT::IGF	\$0.00	\$0.00	2016	2/26/2016	SS001560066		1	SMALL BUSINESS
COMPOSITION RESEARCH TECHNOLOGIES, INC	RENEWAL OF SS00-12-50195 ON MAINTENANCE OF CR T	\$13,940.00	\$0.00	2015	9/3/2015	SS001350249		3	SMALL BUSINESS
COMPOSITION RESEARCH TECHNOLOGIES, INC	RENEWAL OF SS00-12-50195 ON MAINTENANCE OF CR T	\$13,940.00	\$0.00	2016	8/31/2016	SS001350249		4	SMALL BUSINESS
NATIONAL DISABILITY RIGHTS NETWORK INC	REP PAYEE REVIEWS - INTERNAL ADMINISTRATIVE MODI	\$0.00	\$0.00	2016	8/15/2016	SS000960111		30	OTHER THAN SMALL BUSINESS
NATIONAL DISABILITY RIGHTS NETWORK INC	REPRESENTATIVE PAYEE REVIEWS	\$0.00	\$0.00	2016	3/4/2016	SS000960111		27	OTHER THAN SMALL BUSINESS
NATIONAL DISABILITY RIGHTS NETWORK INC	REPRESENTATIVE PAYEE REVIEWS - ADMINISTRATIVE MC	\$0.00	\$0.00	2016	4/4/2016	SS000960111		29	OTHER THAN SMALL BUSINESS
XANTHOPOULOS, LARY	RMC - ORIENTATION MODIFICATION 1 TO INCORPORATE CHANGE OF NAME. IGF::CL::IGF	\$0.00	\$0.00	2015	8/31/2015		1 SS01154C001	1	SMALL BUSINESS
REDJAE, MARTA MD	RMC - ORIENTATION IGF::CL::IGF	\$0.00	\$0.00	2015	9/10/2015		1 SS01154C003	1	SMALL BUSINESS
SHI INTERNATIONAL CORP.	SOCIAL SECURITY ADMINISTRATION'S OFFICE OF THE INS	\$0.00	\$0.00	2016	2/10/2016	SS001550182		1	OTHER THAN SMALL BUSINESS
SHI INTERNATIONAL CORP.	SOCIAL SECURITY ADMINISTRATION'S OFFICE OF THE INS	\$0.00	\$0.00	2016	2/10/2016	SS001650055		1	OTHER THAN SMALL BUSINESS
SYNCSORT INCORPORATED	SOFTWARE MAINTENANCE AND LICENSE UPGRADES FOR	\$242,185.85	\$0.00	2016	12/17/2015	SS001560062		1	OTHER THAN SMALL BUSINESS
SYNCSORT INCORPORATED	SOFTWARE MAINTENANCE AND LICENSE UPGRADES FOR	\$594,465.21	\$0.00	2016	8/25/2016	SS001560062		2	OTHER THAN SMALL BUSINESS
PITNEY BOWES GLOBAL FINANCIAL SERVICES LLC	SOLE SOURCE MAINTENANCE/METER RENTAL CONTRAC	\$0.00	\$0.00	2015	12/23/2014	SS001360018		3	OTHER THAN SMALL BUSINESS
PITNEY BOWES GLOBAL FINANCIAL SERVICES LLC	SOLE SOURCE MAINTENANCE/METER RENTAL CONTRAC	\$0.00	\$0.00	2015	6/30/2015	SS001360018		4	OTHER THAN SMALL BUSINESS
ROCK CREEK PUBLISHING GROUP	SS00-10-60086- WEBSITE AND MOBILE APPLICATION DES	\$0.00	\$0.00	2015	7/22/2015	SS001060086		13	SMALL BUSINESS
IRON DATA SOLUTIONS, INC. (DE)	SS00-11-60059- IDIQ CONTRACT WITH IRON DATA SOLU	\$0.00	\$0.00	2016	3/11/2016	SS001160059		12	OTHER THAN SMALL BUSINESS
IRON DATA SOLUTIONS, INC. (DE)	SS00-11-60059- IDIQ CONTRACT WITH IRON DATA SOLU	\$0.00	\$0.00	2015	8/7/2015	SS001160059		11	OTHER THAN SMALL BUSINESS
IRON DATA SOLUTIONS, INC. (DE)	SS00-11-60059- IDIQ CONTRACT WITH MICROPACK GLOB	\$0.00	\$0.00	2016	8/30/2016	SS001160059		13	OTHER THAN SMALL BUSINESS
INTERNATIONAL BUSINESS MACHINES CORPORATION	SS00-16-60010 - MAINFRAME HARDWARE UPGRADE - D	\$0.00	\$0.00	2017	11/9/2016	SS001730008	SS001660010	1	OTHER THAN SMALL BUSINESS
AHTNA ENGINEERING SERVICES	SSANRC-CLERICAL CONTRACT - CHANGE OF THE ALT-COTR  N/A PRIOR 03/01/2012 - NOT APPLICABLE-BASE AWARD ISSUED PRIOR TO 03/01/2012	\$0.00	\$0.00	2015	3/6/2015	SS000760063		28	SMALL BUSINESS
AHTNA ENGINEERING SERVICES	SSANRC-CLERICAL CONTRACT - CHANGE OF THE COTR  N/A PRIOR 03/01/2012 - NOT APPLICABLE-BASE AWARD ISSUED PRIOR TO 03/01/2012	\$0.00	\$0.00	2015	2/12/2015	SS000760063		27	SMALL BUSINESS
AHTNA ENGINEERING SERVICES	SSANRC-CLERICAL CONTRACT - EXERCISE INCENTIVE OPTION YEAR VIII. AUGUST 1, 2015 TO JULY 31, 2016.  N/A PRIOR 03/01/2012 - NOT APPLICABLE-BASE AWARD ISSUED PRIOR TO 03/01/2012	\$10,769,172.00	\$0.00	2015	7/8/2015	SS000760063		29	SMALL BUSINESS
AHTNA ENGINEERING SERVICES	SSANRC-CLERICAL CONTRACT - INCORPORATE REVISED QUANTITIES - ATTACHMENT # 11 OF THE CONTRACT.  N/A PRIOR 03/01/2012 - NOT APPLICABLE-BASE AWARD ISSUED PRIOR TO 03/01/2012	\$0.00	\$0.00	2016	5/6/2016	SS000760063		31	SMALL BUSINESS
REEMA CONSULTING SERVICES, INC.	SSOS-09-60015 DBOPC - PRINT MAIL FACILITY TASK	\$35,986.39	\$0.00	2015	12/30/2014	SS001160015		15	SMALL BUSINESS
REEMA CONSULTING SERVICES, INC.	SSOS-09-60015 DBOPC - PRINT MAIL FACILITY TASK	\$395,850.29	\$0.00	2015	1/23/2015	SS001160015		16	SMALL BUSINESS
SOUTHERN BUSINESS SYSTEMS, INC.	STANDARD MAINTENANCE FOR LEKTREIVERS	\$8,832.92	\$0.00	2015	3/12/2015	SS041150014		5	SMALL BUSINESS
TETON DATA SYSTEMS INC	STATIREF MEDICAL TEXTBOOKS ONLINE - MODIFICATION	\$0.00	\$0.00	2015	2/28/2015	SS001050174		14	SMALL BUSINESS
MANAGEMENT SERVICES, FLORIDA DEPARTMENT OF	SUBSCRIPTION - ACCESS FLORIDA CRIMINAL JUSTICE NETWORK (CJNET) SERVICE. IGF::OT::IGF	\$6,906.72	\$0.00	2015	5/21/2015	SS041450005		1	OTHER THAN SMALL BUSINESS

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MANAGEMENT SERVICES, FLORIDA DEPARTMENT OF	SUBSCRIPTION - ACCESS FLORIDA CRIMINAL JUSTICE NETWORK (CJNET) SERVICE. IGF::OT::IGF	\$6,906.72	\$0.00	2016	6/8/2016	SS041450005		2	OTHER THAN SMALL BUSINESS
CINCOM SYSTEMS, INC.	SUPPLEMENTAL FUNDING REQUEST - MODIFY LICENSE T	\$974,156.23	\$0.00	2015	12/24/2014	SS001360033		5	OTHER THAN SMALL BUSINESS
HERMAN MILLER, INC.	SYSTEMS FURNITURE CONTRACT	\$0.00	\$0.00	2015	1/6/2015	SS001260003		26	OTHER THAN SMALL BUSINESS
HERMAN MILLER, INC.	SYSTEMS FURNITURE CONTRACT	\$0.00	\$0.00	2015	2/3/2015	SS001260003		27	OTHER THAN SMALL BUSINESS
HERMAN MILLER, INC.	SYSTEMS FURNITURE CONTRACT	\$0.00	\$0.00	2015	2/3/2015	SS001260003		28	OTHER THAN SMALL BUSINESS
HERMAN MILLER, INC.	SYSTEMS FURNITURE CONTRACT	\$0.00	\$0.00	2015	9/10/2015	SS001260003		33	OTHER THAN SMALL BUSINESS
HERMAN MILLER, INC.	SYSTEMS FURNITURE CONTRACT - EXERCISE OPTION YEA	\$0.00	\$0.00	2016	12/18/2015	SS001260003		34	OTHER THAN SMALL BUSINESS
HERMAN MILLER, INC.	SYSTEMS FURNITURE CONTRACT - THIS MODIFICATION IS	\$0.00	\$0.00	2016	7/27/2016	SS001260003		37	OTHER THAN SMALL BUSINESS
THE ARC OF BALTIMORE INCORPORATED (1428)	THE ARC FOY8	\$0.00	\$0.00	2016	10/29/2015	SS000860012		48	OTHER THAN SMALL BUSINESS
RELIASOURCE, INC.	THE OFFICE OF TELECOMMUNICATIONS SYSTEMS OPERATION REQUESTED FUNDING BE ADDED TO OPTION ONE FOR THE MAINTENANCE OF DELL SERVERS. IGF::OT::IGF	\$0.00	\$0.00	2015	2/2/2015	SS001350271		3	SMALL BUSINESS
OPEX CORPORATION	THE PURPOSE OF THIS BILATERAL MODIFICATION IS TO UPDATE AND INCORPORATE AS FOLLOWS:  1) SECTION B - SUPPLIES/SERVICES/PRICES/COSTS  2) B-1 STATEMENT OF WORK  3) SECTION C - FEDERAL ACQUISITION REGULATIONS (FAR)INCORPORATED BY REFERENCE CONTRACT CLAUSES  4) TO CORRECT THE OMATION 306 LETTER OPENER SERIAL NUMBER FROM ZE1045 TO ZE01045  THIS INFORMATION WAS NOT INCORPORATED ERRANTLY IN THE ORIGINAL AWARD.  ALL OTHER TERMS AND CONDITIONS REMAIN UNCHANGED.  IGF::OT::IGF	\$0.00	\$0.00	2016	8/25/2016	SS031650007		1	SMALL BUSINESS
NEOPOST USA INC.	THE PURPOSE OF THIS CONTRACT IS TO FUND METER RE	\$7,350.24	\$0.00	2016	12/24/2015	SS001550057		1	OTHER THAN SMALL BUSINESS
CROSSROADS BUILDING SERVICES INCORPORATED	THE PURPOSE OF THIS MODIFICATION IS NECESSARY TO ADD A CLAUSE AND UPDATE A CLAUSE.  N/A PRIOR 03/01/2012	\$0.00	\$0.00	2016	5/10/2016	SS000760045		32	OTHER THAN SMALL BUSINESS
AHTNA ENGINEERING SERVICES	THE PURPOSE OF THIS MODIFICATION IS NECESSARY TO MAKE ADMINISTRATIVE CHANGES TO THE ACCOUNTING INFO ON MOD # 30.  N/A PRIOR 03/01/2012 - NOT APPLICABLE-BASE AWARD ISSUED PRIOR TO 03/01/2012	\$0.00	\$0.00	2016	5/13/2016	SS000760063		32	SMALL BUSINESS
PECO ENERGY COMPANY	THE PURPOSE OF THIS MODIFICATION IS TO CHANGE TH	\$0.00	\$0.00	2017	10/19/2016	SS031630009	GS00P16BSD1212	1	OTHER THAN SMALL BUSINESS
PHILADELPHIA, CITY OF	THE PURPOSE OF THIS MODIFICATION IS TO CHANGE TH	\$0.00	\$0.00	2017	10/19/2016	SS031630007	GS00P08BSD0546	1	OTHER THAN SMALL BUSINESS
PHILADELPHIA, CITY OF- WATER DEPARTMENT	THE PURPOSE OF THIS MODIFICATION IS TO CHANGE TH	\$0.00	\$0.00	2017	10/19/2016	SS031650005		1	OTHER THAN SMALL BUSINESS
TENACITY, INC.	THE PURPOSE OF THIS MODIFICATION IS TO EXERCISE OPTION I OF THE CONTRACT FOR THE CONTINUED MAINTENANCE OF SSA LICENSED TENACITY ACCESSAPHONE AN IP-TTY SOFTWARE.	\$10,000.00	\$0.00	2016	5/23/2016	SS001560035		3	SMALL BUSINESS
I/S MANAGEMENT STRATEGIES LTD	THE PURPOSE OF THIS MODIFICATION IS TO EXERCISE TH	\$13,334.00	\$0.00	2017	10/21/2016	SS001650022		2	OTHER THAN SMALL BUSINESS
PITNEY BOWES INC.	THE PURPOSE OF THIS MODIFICATION IS TO UPDATE THE	\$0.00	\$0.00	2017	11/17/2016	SS001560060		1	OTHER THAN SMALL BUSINESS
DLT SOLUTIONS INCORPORATED	THE PURPOSES OF MODIFICATION NUMBER 000004 ARE	\$0.00	\$0.00	2016	7/13/2016	SS001530527	W91QUZ06A0004	4	SMALL BUSINESS

Sole Source Contracts  
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INNOVATION DATA PROCESSING, INC.	THIS ADMINISTRATIVE MODIFICATION IS BEING ISSUED TO	\$0.00	\$0.00	2015	5/13/2015	SS001550008		5	OTHER THAN SMALL BUSINESS
ACCUSOFT CORPORATION	THIS ADMINISTRATIVE MODIFICATION IS BEING ISSUED TO	\$0.00	\$0.00	2016	2/9/2016	SS001550159		1	SMALL BUSINESS
COMPUWARE CORPORATION	THIS BILATERAL MODIFICATION 7 IS BEING ISSUED TO UP	\$0.00	\$0.00	2016	5/10/2016	SS001160060		7	OTHER THAN SMALL BUSINESS
WOLTERS KLUWER FINANCIAL SERVICES, INC.	THIS BILATERAL MODIFICATION IS BEING ISSUED TO INCL	\$0.00	\$0.00	2015	3/20/2015	SS001550090		1	OTHER THAN SMALL BUSINESS
CONCISE INC.	THIS CONTRACT IS TO PERFORM VERTICAL AND HORIZON	\$262,634.04	\$0.00	2015	7/28/2015	SS001461110		1	SMALL BUSINESS
CONCISE INC.	THIS CONTRACT IS TO PERFORM VERTICAL AND HORIZON	\$267,886.68	\$0.00	2016	8/24/2016	SS001461110		2	SMALL BUSINESS
PERFORMANCE ASSOCIATES, INC.	TO EXERCISE OPTION I CLIN 002 UNDER CONTRACT SS00	\$60,000.00	\$0.00	2017	10/1/2016	SS001660001		1	SMALL BUSINESS
TENACITY, INC.	TO INCORPORATE FAR CLAUSE 52.217-9, FAR 52.217-9 O	\$0.00	\$0.00	2016	5/19/2016	SS001560035		2	SMALL BUSINESS
CARAHSOFT TECHNOLOGY CORP.	TO PURCHASE 3 MONTHS OF MAINTENANCE FOR HP EDI	\$0.00	\$0.00	2016	6/24/2016	SS001650164		1	OTHER THAN SMALL BUSINESS
MAZDA COMPUTER CORPORATION	UNILATERAL MODIFICATION TO CHANGE COTR	\$0.00	\$0.00	2016	6/10/2016	SS001560044		1	OTHER THAN SMALL BUSINESS
KONIAG SERVICES INC	SOSS BASE YEAR (SERVICES)	(\$0.18)	(\$0.18)	2016	12/9/2015		1 SS000960009	5	SMALL BUSINESS
HUMAN SERVICES, OREGON DEPARTMENT OF	ELECTRONIC DEATH REGISTRATION - OREGON THE PURPOSE OF MODIFICATION NUMBER 4 IS TO EXERCISE OPTION YEAR THREE TO EXTEND THE TERM OF THE CONTRACT FROM JANUARY 1, 2015 THROUGH DECEMBER 31, 2015 FOR RECEIPT OF ELECTRONIC DEATH RECORDS.	\$0.00	(\$0.27)	2015	12/15/2014	SS001260042		4	OTHER THAN SMALL BUSINESS
HEALTH & SENIOR SERVICES, NEW JERSEY DEPARTMENT OF	ELECTRONIC DEATH REGISTRATION NEW JERSEY THE PURPOSE OF MODIFICATION NUMBER 5 IS TO EXERCISE OPTION YEAR IV TO EXTEND THE TERM OF THE CONTRACT FROM JANUARY 1, 2016 THROUGH DECEMBER 31, 2016 FOR RECEIPT OF ELECTRONIC DEATH RECORDS.	\$0.00	(\$0.33)	2016	12/3/2015	SS001260031		5	OTHER THAN SMALL BUSINESS
HEALTH & SENIOR SERVICES, NEW JERSEY DEPARTMENT OF	ELECTRONIC DEATH REGISTRATION - NEW JERSEY. THE PURPOSE OF MODIFICATION NUMBER 4 IS TO EXERCISE OPTION YEAR THREE TO EXTEND THE TERM OF THE CONTRACT FROM JANUARY 1, 2015 THROUGH DECEMBER 31, 2015 FOR RECEIPT OF ELECTRONIC DEATH RECORDS.	\$0.00	(\$0.41)	2015	12/2/2014	SS001260031		4	OTHER THAN SMALL BUSINESS
SOUTH DAKOTA, STATE OF	ELECTRONIC DEATH REGISTRATION - SOUTH DAKOTA THE PURPOSE OF MODIFICATION NUMBER 4 IS TO EXERCISE OPTION YEAR THREE TO EXTEND THE TERM OF THE CONTRACT FROM JANUARY 1, 2015 THROUGH DECEMBER 31, 2015 FOR RECEIPT OF ELECTRONIC DEATH RECORDS.	\$0.00	(\$0.50)	2015	12/15/2014	SS001260055		4	OTHER THAN SMALL BUSINESS
SOUTH DAKOTA, STATE OF	ELECTRONIC DEATH REGISTRATION SOUTH DAKOTA THE PURPOSE OF MODIFICATION NUMBER 5 IS TO EXERCISE OPTION YEAR IV TO EXTEND THE TERM OF THE CONTRACT FROM JANUARY 1, 2016 THROUGH DECEMBER 31, 2016 FOR RECEIPT OF ELECTRONIC DEATH RECORDS.	\$0.00	(\$0.50)	2016	12/3/2015	SS001260055		5	OTHER THAN SMALL BUSINESS
EXECUTIVE OFFICE OF THE GOVERNOR OF DELAWARE	ELECTRONIC DEATH REGISTRATION DELAWARE THE PURPOSE OF MODIFICATION NUMBER 6 IS TO EXERCISE OPTION YEAR IV TO EXTEND THE TERM OF THE CONTRACT FROM JANUARY 1, 2016 THROUGH DECEMBER 31, 2016 FOR RECEIPT OF ELECTRONIC DEATH RECORDS.	\$0.00	(\$0.50)	2016	12/8/2015	SS001260018		6	OTHER THAN SMALL BUSINESS
KONIAG SERVICES INC	IGF::CT::IGF CRITICAL FUNCTIONS	(\$6.84)	(\$6.84)	2016	12/9/2015		50 SS000960009	1	SMALL BUSINESS
HERMAN MILLER, INC.	HENDERSON, KY #XB20 DESIGN, INSTALLATION AND PRO	(\$11.49)	(\$11.49)	2015	2/12/2015	SS001431979	SS001260003	1	OTHER THAN SMALL BUSINESS
KONIAG SERVICES INC	IGF::CT::IGF CRITICAL FUNCTIONS  TASK ORDER 52 AGAINST SS00-09-60009 WITH KONIAG (KSI) OFFICE OF DISABILITY REVIEW (ODAR) OPERATIONAL SUPPORT.	(\$15.02)	(\$15.02)	2016	12/9/2015		52 SS000960009	1	SMALL BUSINESS

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KONIAG SERVICES INC	IGF::CT::IGF CRITICAL FUNCTIONS  TASK ORDER 51 AGAINST SS00-09-60009 WITH KONIAG (KSI) OFFICE OF DISABILITY REVIEW (ODAR) OPERATIONAL SUPPORT.	(\$20.43)	(\$20.43)	2016	12/9/2015	51	SS000960009	1	SMALL BUSINESS
GEORGE K GANAWAY, MD, PC	IGF::OT::IGF NON-INDEPENDENT CASE REVIEWS HOURS	(\$39.18)	(\$39.18)	2015	9/28/2015	9	SS041140071	2	SMALL BUSINESS
ARTHUR L LEWY	IGF::CL::IGF REGIONAL MEDICAL CONSULTANT SERVICES FOR THE SOCIAL SECURITY ADMINISTRATION. REVIEWS BY MEDICAL CONSULTANT OF DISABILITY CLAIM CASE FILES FOR AGENCY DISABILITY PROGRAM.	(\$45.83)	(\$45.83)	2016	9/16/2016	3	SS10154C007	1	SMALL BUSINESS
HERMAN MILLER, INC.	VENICE, FL XA14 DESIGN, INSTALLATION AND PRODUCT	(\$90.65)	(\$90.65)	2016	6/6/2016	SS001630137	SS001260003	1	OTHER THAN SMALL BUSINESS
CRA INTERNATIONAL, INC.	IGF::OT::IGF BILATERAL MODIFICATION FOR THE FOLLOWING ACTIONS:  1) REVISE OPTION PERIOD I; 2) EXERCISE OPTION PERIOD I, IN ACCORDANCE WITH FAR 52.217-9, WITH A PERIOD OF PERFORMANCE OF 06/04/2016 THROUGH 06/03/2017; AND 3) REVISE SECTIONS C-13 AND C-17 TO READ AS SHOWN.	\$78,565.00	(\$133.00)	2016	5/20/2016	SS001560036		7	OTHER THAN SMALL BUSINESS
RAMIREZ, RICARDO J	IGF::CL::IGF CLOSELY ASSOCIATED MODIFICATION DEDUCT 1.91 ADDITIONAL SERVICE HOURS AT A RATE OF \$88.03.	(\$168.14)	(\$168.14)	2015	4/22/2015	8	SS011140008	2	SMALL BUSINESS
KONIAG SERVICES INC	IGF::CT::IGF CRITICAL FUNCTIONS  TASK ORDER 54 AGAINST SS00-09-60009 WITH KONIAG (KSI) FOR NATIONAL SERVICE CENTER (NSC) SUPPORT TASKS	(\$170.30)	(\$170.30)	2016	12/9/2015	54	SS000960009	1	SMALL BUSINESS
OPEX CORPORATION	MAINTENANCE CONTRACT FOR OPEX MODEL PS51/OMATION 306 LETTER OPENER								
HERMAN MILLER, INC.	IGF::OT::IGF OTHER FUNCTIONS	\$0.00	(\$236.88)	2015	12/23/2014	SS031450006		2	OTHER THAN SMALL BUSINESS
KONIAG SERVICES INC	PUEBLO, CO C883 - DESIGN, PRODUCT, AND INSTALLATION	(\$252.09)	(\$252.09)	2015	8/20/2015	SS001530354	SS001260003	1	OTHER THAN SMALL BUSINESS
HERMAN MILLER, INC.	CONTRACTOR SUPPORT FOR THE WINDOWS 7 CONVERSION	(\$319.60)	(\$319.60)	2016	10/7/2015	25	SS000960009	1	SMALL BUSINESS
HERMAN MILLER, INC.	IE29 WEST SACRAMENTO, CA - SYSTEMS FURNITURE - TO	(\$322.35)	(\$322.35)	2015	8/20/2015	SS001530158	SS001260003	1	OTHER THAN SMALL BUSINESS
HERMAN MILLER, INC.	GREENVILLE, SC CX48 - DESIGN, PRODUCT AND INSTALLATION	(\$392.16)	(\$392.16)	2015	6/29/2015	SS001530287	SS001260003	1	OTHER THAN SMALL BUSINESS
UNITED STATES POSTAL SERVICE	THE PURPOSE OF THIS MODIFICATION IS CHANGE THE METHOD OF PAYMENT FROM PURCHASE CARD TO INVOICE AND TO REDUCE THE AWARD AMOUNT BY \$468.00 FROM \$11,988.00 \$11,520.00. REDUCTION IS BASED ON PRICE REDUCTION FROM POST OFFICE. IGF::CL::IGF	(\$468.00)	(\$468.00)	2016	4/25/2016	SS031650002		1	OTHER THAN SMALL BUSINESS
HEALTH AND HUMAN RESOURCES WEST VIRGINIA DEPARTMENT OF	IGF::OT::IGF OTHER FUNCTIONS ENUMERATION AT BIRTH - WEST VIRGINIA DELIVERY ORDER	(\$469.37)	(\$469.37)	2016	10/8/2015	SS001330062	SS000860067	1	OTHER THAN SMALL BUSINESS
HERMAN MILLER, INC.	MURFREESBORO, TN XA578 DESIGN, INSTALLATION AND PRODUCT	(\$511.00)	(\$511.00)	2015	12/15/2014	SS001431484	SS001260003	1	OTHER THAN SMALL BUSINESS
KONIAG SERVICES INC	CONTRACT CLOSEOUT IGF::OT::IGF	(\$512.07)	(\$512.07)	2016	12/2/2015	40	SS000960009	1	SMALL BUSINESS
HEALTH NORTH DAKOTA DEPARTMENT OF	IGF::OT::IGF OTHER FUNCTIONS DELIVERY ORDER FOR EAB CONTRACT SS00-08-60052 - NORTH DAKOTA	(\$517.06)	(\$517.06)	2015	1/21/2015	SS001330178	SS000860052	1	OTHER THAN SMALL BUSINESS
HERMAN MILLER, INC.	CONWAY, SC X592 DESIGN, INSTALLATION AND PRODUCT	(\$518.07)	(\$518.07)	2016	1/11/2016	SS001530549	SS001260003	1	OTHER THAN SMALL BUSINESS
HERMAN MILLER, INC.	PONCE, PR #X272 DESIGN, INSTALLATION AND PRODUCT	(\$534.82)	(\$534.82)	2015	1/27/2015	SS001431659	SS001260003	1	OTHER THAN SMALL BUSINESS
HERMAN MILLER, INC.	LENEXA, KS DO #I779 - SYSTEMS FURNITURE; MODIFICATION	(\$546.00)	(\$546.00)	2016	1/12/2016	SS001530650	SS001260003	1	OTHER THAN SMALL BUSINESS

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HERMAN MILLER, INC.	FORT SMITH AR DO #Y756 MODIFICATION TO DECREASE	(\$580.21)	(\$580.21)	2016	1/11/2016	SS001530420	SS001260003	1	OTHER THAN SMALL BUSINESS
KONIAG SERVICES INC	IGF::CT::IGF CRITICAL FUNCTIONS	(\$659.84)	(\$659.84)	2016	12/9/2015	44	SS000960009	3	SMALL BUSINESS
HERMAN MILLER, INC.	NAPLES, FL YC18, DESIGN, INSTALL AND PRODUCT FOR S	(\$660.61)	(\$660.61)	2016	3/1/2016	SS001530886	SS001260003	1	OTHER THAN SMALL BUSINESS
SABREE, INC.	IGF::OT::IGF CAGE CODE: 4KUQ1  EXERCISE OPTION YEAR II.  ASBESTOS RENOVATION AND REMOVAL SERVICES AT THE SOCIAL SECURITY ADMINISTRATION'S HEADQUARTERS BUILDINGS AND OUTLYING BUILDINGS LOCATED IN BALTIMORE, MD	\$0.00	(\$782.40)	2016	7/23/2016	SS001461113		4	SMALL BUSINESS
HERMAN MILLER, INC.	PHILADELPHIA,(GERMANTOWN),PA #G218 - DESIGN, INS	(\$813.00)	(\$813.00)	2015	9/10/2015	SS001530736	SS001260003	1	OTHER THAN SMALL BUSINESS
HEALTH TENNESSEE DEPT OF	IGF::OT::IGF OTHER FUNCTIONS DELIVERY ORDER FOR EAB CONTRACT SS00-08-60061 - TENNESSEE	(\$835.83)	(\$835.83)	2015	1/28/2015	SS001330181	SS000860061	1	OTHER THAN SMALL BUSINESS
HEALTH VERMONT DEPARTMENT OF	IGF::OT::IGF OTHER FUNCTIONS ENUMERATION AT BIRTH VERMONT	(\$863.44)	(\$863.44)	2016	10/2/2015	SS001330364	SS000860064	1	OTHER THAN SMALL BUSINESS
HEALTH WYOMING DEPARTMENT OF	IGF::OT::IGF OTHER FUNCTIONS ENUMERATION AT BIRTH - WYOMING	(\$865.95)	(\$865.95)	2016	10/20/2015	SS001330136	SS000860069	1	OTHER THAN SMALL BUSINESS
HEALTH WYOMING DEPARTMENT OF	IGF::OT::IGF OTHER FUNCTIONS ENUMERATION AT BIRTH - WYOMING	(\$896.07)	(\$896.07)	2016	10/20/2015	SS001330380	SS000860069	1	OTHER THAN SMALL BUSINESS
HERMAN MILLER, INC.	STATESVILLE, NC DO #E341 MODIFICATION TO CHANGE	(\$902.00)	(\$902.00)	2016	1/8/2016	SS001530157	SS001260003	1	OTHER THAN SMALL BUSINESS
JACOBSON, JAN	IGF::CL::IGF SS01-16-4C012 JACOBSON, JAN DEDUCT 10	(\$905.70)	(\$905.70)	2016	8/29/2016	1	SS01164C012	1	SMALL BUSINESS
HEALTH NORTH DAKOTA DEPARTMENT OF	ELECTRONIC BIRTH REGISTRATION - NORTH DAKOTA.	(\$947.43)	(\$947.43)	2015	1/21/2015	SS001130146	SS000860052	1	OTHER THAN SMALL BUSINESS
MORNINGSTAR MAIN HICKORY	IGF::OT::IGF TEMPORARY STORAGE UNITS FOR SSA HICKORY, NC	(\$1,001.00)	(\$1,001.00)	2016	6/1/2016	SS041550015		2	SMALL BUSINESS
HEALTH VERMONT DEPARTMENT OF	IGF::OT::IGF OTHER FUNCTIONS ENUMERATION AT BIRTH - VERMONT	(\$1,039.14)	(\$1,039.14)	2016	10/1/2015	SS001330126	SS000860064	1	OTHER THAN SMALL BUSINESS
SOUTH DAKOTA STATE OF (0366)	IGF::OT::IGF OTHER FUNCTIONS DELIVERY ORDER FOR EAB CONTRACT SS00-08-60060 - SOUTH DAKOTA	(\$1,076.79)	(\$1,076.79)	2015	1/28/2015	SS001330461	SS000860060	1	OTHER THAN SMALL BUSINESS
DISTRICT OF COLUMBIA GOVERNMENT	IGF::OT::IGF OTHER FUNCTIONS ENUMERATION AT BIRTH DISTRICT OF COLUMBIA	(\$1,111.93)	(\$1,111.93)	2015	1/30/2015	SS001330349	SS000860025	1	OTHER THAN SMALL BUSINESS
HAMMONDS, T MICHAEL PHD	MEDICAL CONTRACTOR SERVICES - NON-CASES SERVICES CLOSELY ASSOCIATED TO INHERENTLY GOVERNMENTAL FUNCTION	(\$1,140.12)	(\$1,140.12)	2015	6/11/2015	17	SS041140022	1	SMALL BUSINESS
PITNEY BOWES GLOBAL FINANCIAL SERVICES LLC	SS00-13-60018 MAINTENANCE SERVICE AND METER REN	(\$1,206.00)	(\$1,206.00)	2016	12/10/2015	SS001530672	SS001360018	1	OTHER THAN SMALL BUSINESS
HERMAN MILLER, INC.	DESIGN AND INSTALLATION SERVICES FOR BROOKLYN, N	(\$1,289.62)	(\$1,289.62)	2015	12/15/2014	SS001331114	SS001260003	1	OTHER THAN SMALL BUSINESS
HERMAN MILLER, INC.	THOUSAND OAKS, CA AA09 - DESIGN, INSTALLATION ANI	(\$1,299.26)	(\$1,299.26)	2015	5/29/2015	SS001431686	SS001260003	2	OTHER THAN SMALL BUSINESS
SOUTH DAKOTA STATE OF (0366)	IGF::OT::IGF OTHER FUNCTIONS DELIVERY ORDER FOR EAB CONTRACT SS00-08-60060 - SOUTH DAKOTA	(\$1,330.30)	(\$1,330.30)	2015	1/28/2015	SS001330180	SS000860060	1	OTHER THAN SMALL BUSINESS
DISTRICT OF COLUMBIA GOVERNMENT	IGF::OT::IGF OTHER FUNCTIONS ENUMERATION AT BIRTH - DISTRICT OF COLUMBIA	(\$1,330.30)	(\$1,330.30)	2015	1/30/2015	SS001330108	SS000860025	1	OTHER THAN SMALL BUSINESS
KARANDE MD, MEGHANA C	IGF::CL::IGF SS01-16-4C023 KARANDE, MEGHANA DEDUCT 15 NON- CASE HOURS FOR A TOTAL OF -\$1,358.55.	(\$1,358.55)	(\$1,358.55)	2016	8/29/2016	1	SS01164C023	1	SMALL BUSINESS
NAOMI M KELLY	IGF::CL::IGF SS01-16-4C019 DEDUCT 15 NON-CASE HOURS AT \$90.57 PER HOUR FROM THE CALL ORDER.	(\$1,358.55)	(\$1,358.55)	2016	8/29/2016	1	SS01164C019	1	SMALL BUSINESS
HERMAN MILLER, INC.	SACO, ME #AA24 - ADD ON MA-95 WORKSTATION - SYST	(\$1,432.14)	(\$1,432.14)	2015	7/8/2015	SS001530195	SS001260003	1	OTHER THAN SMALL BUSINESS
HERMAN MILLER, INC.	SUMTER, SC A595 DESIGN, PRODUCT AND INSTALLATION	(\$1,435.02)	(\$1,435.02)	2016	8/19/2016	SS001630289	SS001260003	1	OTHER THAN SMALL BUSINESS
HEALTH AND HUMAN SERVICES MAINE DEPARTMENT OF	IGF::CL::IGF ENUMERATION AT BIRTH - MAINE	(\$1,448.27)	(\$1,448.27)	2015	12/2/2014	SS001330115	SS000860036	1	OTHER THAN SMALL BUSINESS
HERMAN MILLER, INC.	ASTORIA, OR ID52 - DESIGN, INSTALLATION AND PRODU	(\$1,502.54)	(\$1,502.54)	2015	1/12/2015	SS001431982	SS001260003	1	OTHER THAN SMALL BUSINESS
HEALTH NORTH DAKOTA DEPARTMENT OF	BIRTH RECORDS - STATE OF NORTH DAKOTA	(\$1,504.95)	(\$1,504.95)	2015	1/21/2015	SS001030331	SS000860052	1	OTHER THAN SMALL BUSINESS

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HEALTH TENNESSEE DEPT OF	IGF::OT::IGF OTHER FUNCTIONS DELIVERY ORDER FOR EAB CONTRACT SS00-08-60061 - TENNESSEE	(\$1,592.83)	(\$1,592.83)	2015	1/28/2015	SS001330462	SS000860061	1	OTHER THAN SMALL BUSINESS
HEALTH AND HUMAN RESOURCES WEST VIRGINIA DEPARTMENT OF	IGF::OT::IGF OTHER FUNCTIONS ENUMERATION AT BIRTH - WEST VIRGINIA DELIVERY ORDER	(\$1,674.17)	(\$1,674.17)	2016	10/7/2015	SS001330378	SS000860067	1	OTHER THAN SMALL BUSINESS
HERMAN MILLER, INC.	BROOKLYN BEDFORD HEIGHTS, NY #A160 - TWO NEW HI	(\$1,737.00)	(\$1,737.00)	2016	8/19/2016	SS001630593	SS001260003	1	OTHER THAN SMALL BUSINESS
HEALTH AND HUMAN SERVICES MAINE DEPARTMENT OF	IGF::OT::IGF ENUMERATION AT BIRTH MAINE	(\$1,827.28)	(\$1,827.28)	2015	12/2/2014	SS001330356	SS000860036	1	OTHER THAN SMALL BUSINESS
HERMAN MILLER, INC.	DESIGN SERVICES, PRODUCT AND INSPECTION OF HM W	(\$1,842.56)	(\$1,842.56)	2015	1/5/2015	SS001431980	SS001260003	1	OTHER THAN SMALL BUSINESS
HERMAN MILLER, INC.	C197 OWINGS MILLS, MD - DESIGN, INSTALLATION AND	(\$1,868.90)	(\$1,868.90)	2016	8/18/2016	SS001630260	SS001260003	1	OTHER THAN SMALL BUSINESS
HERMAN MILLER, INC.	RIVERHEAD, NY X163 DESIGN, INSTALL AND PRODUCT O	(\$1,919.01)	(\$1,919.01)	2015	8/3/2015	SS001431660	SS001260003	2	OTHER THAN SMALL BUSINESS
DEPARTMENT OF HEALTH UTAH (0545)	IGF::OT::IGF OTHER FUNCTIONS DELIVERY ORDER FOR EAB - UTAH	(\$1,962.82)	(\$1,962.82)	2015	9/25/2015	SS001330376	SS000860063	1	OTHER THAN SMALL BUSINESS
KONIAG SERVICES INC	IGF::CT::IGF CRITICAL FUNCTIONS	(\$2,000.00)	(\$2,000.00)	2016	12/9/2015	42	SS000960009	1	SMALL BUSINESS
HERMAN MILLER, INC.	YAKIMA, WA I919 -RECONFIGURATION OF TWO X-95 WC	(\$2,027.78)	(\$2,027.78)	2015	6/17/2015	SS001530208	SS001260003	1	OTHER THAN SMALL BUSINESS
HERMAN MILLER, INC.	TIFTON, GA #XC95 DESIGN, INSTALLATION AND PRODUC	(\$2,063.57)	(\$2,063.57)	2015	12/15/2014	SS001431657	SS001260003	1	OTHER THAN SMALL BUSINESS
HEALTH AND HOSPITALS LOUISIANA DEPARTMENT OF	ELECTRONIC BIRTH REGISTRATION - LOUISIANA	(\$2,162.18)	(\$2,162.18)	2015	12/1/2014	SS001230189	SS000860035	1	OTHER THAN SMALL BUSINESS
HEALTH AND WELFARE IDAHO DEPARTMENT OF	IGF::OT::IGF DELIVERY ORDER FOR EAB CONTRACT SS00-08-60029 - IDAHO	(\$2,168.64)	(\$2,168.64)	2015	12/1/2014	SS001330440	SS000860029	1	OTHER THAN SMALL BUSINESS
GARY FRANKLIN SPITZ	IGF::CL::IGF  REGION 2 MEDICAL CONSULTANTS. REVIEWS BY MEDICAL CONSULTANT OF DISABILITY CLAIM CASE FILES FOR AGENCY DISABILITY PROGRAM. MODIFICATION TO PROVIDE ADDITIONAL CASE REVIEWS AND EXTEND PERIOD OF PERFORMANCE.	(\$2,285.36)	(\$2,285.36)	2016	7/18/2016	13	SS021140106	3	SMALL BUSINESS
HEALTH RHODE ISLAND DEPARTMENT OF	IGF::OT::IGF OTHER FUNCTIONS ENUMERATION AT BIRTH - RHODE ISLAND	(\$2,289.12)	(\$2,289.12)	2015	1/26/2015	SS001330124	SS000860058	1	OTHER THAN SMALL BUSINESS
HERMAN MILLER, INC.	KISSIMMEE, FL XA16 DESIGN, INSTALLATION AND PRODU	(\$2,296.62)	(\$2,296.62)	2015	12/15/2014	SS001431532	SS001260003	1	OTHER THAN SMALL BUSINESS
HERMAN MILLER, INC.	NEW ORLEANS WESTBANK TERRYTOWN LA #AA70 - SYS	(\$2,330.81)	(\$2,330.81)	2015	1/12/2015	SS001432039	SS001260003	1	OTHER THAN SMALL BUSINESS
HEALTH RHODE ISLAND DEPARTMENT OF	IGF::OT::IGF OTHER FUNCTIONS ENUMERATION AT BIRTH RHODE ISLAND	(\$2,369.44)	(\$2,369.44)	2015	1/26/2015	SS001330361	SS000860058	1	OTHER THAN SMALL BUSINESS
HEALTH INDIANA DEPARTMENT OF	IGF::OT::IGF OTHER FUNCTIONS	(\$2,459.80)	(\$2,459.80)	2015	3/18/2015	SS001330451	SS000860031	1	OTHER THAN SMALL BUSINESS
KONIAG SERVICES INC	IGF::CT::IGF CRITICAL FUNCTIONS	(\$2,502.24)	(\$2,502.24)	2016	12/9/2015	47	SS000960009	2	SMALL BUSINESS
PUBLIC HEALTH IOWA DEPARTMENT OF	ELECTRONIC DEATH REGISTRATION-DEATH MATCH- IOW	(\$2,593.47)	(\$2,593.47)	2016	8/22/2016	SS001130287	SS000660030	1	OTHER THAN SMALL BUSINESS
COX DAN M	IGF::CL::IGF REGIONAL MEDICAL CONSULTANT SERVICES - REVIEWS BY MEDICAL CONSULTANT OF DISABILITY CLAIM CASE FILES FOR AGENCY DISABILITY PROGRAM FOR DAN M. COX - NON-REVIEW HOURS.	(\$2,593.50)	(\$2,593.50)	2016	8/29/2016	1	SS06164C008	1	SMALL BUSINESS
HEALTH DEPARTMENT OKLAHOMA STATE (7987)	IGF::OT::IGF OTHER FUNCTIONS DELIVERY ORDER FOR EAB - OKLAHOMA	(\$2,630.48)	(\$2,630.48)	2015	9/8/2015	SS001330373	SS000860054	1	OTHER THAN SMALL BUSINESS
HEALTH WYOMING DEPARTMENT OF	BIRTH RECORDS - STATE OF WYOMING - CONTRACT YEAR	(\$2,765.79)	(\$2,765.79)	2016	10/7/2015	SS001030362	SS000860069	1	OTHER THAN SMALL BUSINESS
HERMAN MILLER, INC.	ROCKVILLE, MD #BA33 DESIGN, INSTALLATION AND PRO	(\$2,798.40)	(\$2,798.40)	2015	3/30/2015	SS001431656	SS001260003	2	OTHER THAN SMALL BUSINESS
HEALTH AND WELFARE IDAHO DEPARTMENT OF	IGF::CL::IGF ENUMERATION OF BIRTH UNITS - IDAHO	(\$2,806.18)	(\$2,806.18)	2015	12/1/2014	SS001330157	SS000860029	1	OTHER THAN SMALL BUSINESS
HERMAN MILLER, INC.	DESIGN SERVICES, INSTALLATION SERVICES, PRODUCT, A	(\$2,840.40)	(\$2,840.40)	2017	10/27/2016	SS001131126	SS060001601045	2	OTHER THAN SMALL BUSINESS
SEBA PROFESSIONAL SERVICES LLC	IGF::CL::IGF CLOSELY ASSOCIATED - CALL ORDER FOR C	(\$2,876.00)	(\$2,876.00)	2016	9/30/2016	2	SS07164C022	1	SMALL BUSINESS
HERMAN MILLER, INC.	MERRILLVILLE, IN DO #CD61 - DESIGN, INSTALLATION AN	(\$2,893.85)	(\$2,893.85)	2016	8/18/2016	SS001630200	SS001260003	1	OTHER THAN SMALL BUSINESS
PUBLIC HEALTH IOWA DEPARTMENT OF	IGF::OT::IGF OTHER FUNCTIONS DELIVERY ORDER FOR EAB CONTRACT SS00-08-60032 - IOWA	(\$2,901.56)	(\$2,901.56)	2015	3/18/2015	SS001330452	SS000860032	1	OTHER THAN SMALL BUSINESS
HERMAN MILLER, INC.	FAJARDO, PR IC71 DESIGN, INSTALLATION, PRODUCT, OC	(\$2,902.17)	(\$2,902.17)	2015	3/30/2015	SS001431564	SS001260003	2	OTHER THAN SMALL BUSINESS
HEALTH AND MENTAL HYGIENE MARYLAND DEPARTMENT OF	ELECTRONIC DEATH REGISTRATION-DEATH MATCH- MAR	(\$2,965.56)	(\$2,965.56)	2016	8/26/2016	SS001130315	SS000660035	1	OTHER THAN SMALL BUSINESS

Sole Source Contracts  
(December 1, 2014 - December 1, 2016)

Vendor Name	Description of Requirement	Action Obligation	Base and All Options Value	Fiscal Year	Date Signed	PO/Delivery Order/Task Order/Call#	Parent Contract	Mod #	Contracting Officers Business Size Selection
ROSS, JEROME H LTD	IGF::OT::IGF MODIFICATION TO CHANGE PERIOD OF PERFORMANCE FOR HEARING DAYS FROM 4 DAYS TO 3 DAYS.	(\$3,000.00)	(\$3,000.00)	2016	8/1/2016	SS001650184			1 SMALL BUSINESS
HERMAN MILLER, INC.	RIVERHEAD, NY X163 DESIGN, INSTALL AND PRODUCT OF	(\$3,038.00)	(\$3,038.00)	2015	5/1/2015	SS001431660	SS001260003	1	OTHER THAN SMALL BUSINESS
ALKA BISHNOI MD	IGF::CL::IGF REGION 2 MEDICAL CONSULTANTS. REVIEWS BY MEDICAL CONSULTANT OF DISABILITY CLAIM CASE FILES FOR AGENCY DISABILITY PROGRAM. MODIFICATION TO ADD CASES.	(\$3,055.96)	(\$3,055.96)	2016	6/6/2016		SS021140001	4	SMALL BUSINESS
HEALTH INDIANA DEPARTMENT OF	IGF::OT::IGF	(\$3,114.91)	(\$3,114.91)	2015	3/19/2015	SS001330169	SS000860031	1	OTHER THAN SMALL BUSINESS
HEALTH AND HUMAN RESOURCES WEST VIRGINIA DEPARTMENT OF (0771)	ELECTRONIC DEATH REGISTRATION-DEATH MATCH- WES	(\$3,125.46)	(\$3,125.46)	2016	8/26/2016	SS001130272	SS000660056	1	OTHER THAN SMALL BUSINESS
HERMAN MILLER, INC.	YD51 PUYALLUP, WA DESIGN, INSTALL AND PRODUCT ES	(\$3,182.36)	(\$3,182.36)	2015	3/27/2015	SS001530038	SS001260003	1	OTHER THAN SMALL BUSINESS
HUMAN SERVICES OREGON DEPARTMENT OF	IGF::OT::IGF OTHER FUNCTIONS DELIVERY ORDER FOR EAB - OREGON	(\$3,217.82)	(\$3,217.82)	2015	1/26/2015	SS001330374	SS000860055	1	OTHER THAN SMALL BUSINESS
HEALTH WYOMING DEPARTMENT OF	BIRTH RECORDS - STATE OF WYOMING - CONTRACT YEAR	(\$3,224.85)	(\$3,224.85)	2016	10/7/2015	SS001130210	SS000860069	1	OTHER THAN SMALL BUSINESS
HEALTH VERMONT DEPARTMENT OF	BIRTH RECORDS - STATE OF VERMONT - CONTRACT YEAR	(\$3,284.37)	(\$3,284.37)	2016	10/2/2015	SS001130161	SS000860064	1	OTHER THAN SMALL BUSINESS
PUBLIC HEALTH IOWA DEPARTMENT OF	IGF::OT::IGF OTHER FUNCTIONS DELIVERY ORDER FOR EAB CONTRACT SS00-08-60032 - IOWA	(\$3,310.69)	(\$3,310.69)	2015	3/18/2015	SS001330170	SS000860032	1	OTHER THAN SMALL BUSINESS
KONIAG SERVICES INC	IGF::CT::IGF CRITICAL FUNCTIONS	(\$3,449.71)	(\$3,449.71)	2016	12/9/2015		SS000960009	1	SMALL BUSINESS
MAPLEWOOD PSYCHOLOGICAL ASSOCIATES	IGF::CL::IGF THE PURPOSE OF THIS MODIFICATION IS TO DE- OBLIGATE FUNDING FOR INDEPENDENT CASE REVIEWS UNDER THE SUBJECT CALL ORDER.	(\$3,476.00)	(\$3,476.00)	2016	8/25/2016		SS03154C005	1	SMALL BUSINESS
HERMAN MILLER, INC.	KENNER, LA #CA71 TO RAISE PANELS FOR SYSTEMS FURN	(\$3,476.65)	(\$3,476.65)	2015	12/15/2014	SS001431658	SS001260003	1	OTHER THAN SMALL BUSINESS
HEALTH WYOMING DEPARTMENT OF	ELECTRONIC BIRTH REGISTRATION - WYOMING	(\$3,491.72)	(\$3,491.72)	2016	10/20/2015	SS001230110	SS000860069	1	OTHER THAN SMALL BUSINESS
HEALTH AND ENVIRONMENT KANSAS DEPARTMENT OF	IGF::OT::IGF OTHER FUNCTIONS DELIVERY ORDER FOR EAB CONTRACT SS00-08-60033 - KANSAS	(\$3,539.10)	(\$3,539.10)	2015	3/19/2015	SS001330171	SS000860033	1	OTHER THAN SMALL BUSINESS
HEALTH WASHINGTON DEPARTMENT OF	IGF::OT::IGF OTHER FUNCTIONS DELIVERY ORDER FOR EAB - WASHINGTON	(\$3,569.22)	(\$3,569.22)	2016	10/5/2015	SS001330377	SS000860066	1	OTHER THAN SMALL BUSINESS
HEALTH VERMONT DEPARTMENT OF	ELECTRONIC BIRTH REGISTRATION - VERMONT	(\$3,574.56)	(\$3,574.56)	2016	10/1/2015	SS001230108	SS000860064	1	OTHER THAN SMALL BUSINESS
HEALTH AND WELFARE, IDAHO DEPARTMENT OF	ELECTRONIC DEATH REGISTRATION (EDR) FOR THE STATE	(\$3,587.94)	(\$3,587.94)	2016	9/27/2016	SS001130281	SS000960014	2	OTHER THAN SMALL BUSINESS
SOUTH DAKOTA STATE OF (0366)	ELECTRONIC BIRTH REGISTRATION - SOUTH DAKOTA	(\$3,598.04)	(\$3,598.04)	2015	1/26/2015	SS001230130	SS000860060	1	OTHER THAN SMALL BUSINESS
HEALTH AND ENVIRONMENT KANSAS DEPARTMENT OF	IGF::OT::IGF OTHER FUNCTIONS DELIVERY ORDER FOR EAB CONTRACT SS00-08-60033 - KANSAS	(\$3,609.38)	(\$3,609.38)	2015	3/19/2015	SS001330453	SS000860033	1	OTHER THAN SMALL BUSINESS
STATE OF NEW MEXICO (0565)	IGF::OT::IGF DELIVERY ORDER FOR ENUMERATION AT BIRTH (EAB) CONTRACT SS00-08-60048 - NEW MEXICO	(\$3,639.50)	(\$3,639.50)	2016	10/21/2015	SS001330443	SS000860048	1	OTHER THAN SMALL BUSINESS
HEALTH WYOMING DEPARTMENT OF	IGF::OT::IGF OTHER FUNCTIONS WYOMING EAB DELIVERY ORDER S00-08-60069	(\$3,642.01)	(\$3,642.01)	2016	10/20/2015	SS001330684	SS000860069	1	OTHER THAN SMALL BUSINESS
HERMAN MILLER, INC.	BAYAMON, PR B198 DESIGN, INSTALLATION AND PRODU	(\$3,719.10)	(\$3,719.10)	2015	5/1/2015	SS001431804	SS001260003	1	OTHER THAN SMALL BUSINESS
HERMAN MILLER, INC.	BOCA RATON, FL IC16 DESIGN AND INSTALLATION FOR S	(\$3,802.84)	(\$3,802.84)	2016	4/18/2016	SS001630048	SS001260003	1	OTHER THAN SMALL BUSINESS
HUMAN RESOURCES NEVADA DEPARTMENT OF	IGF::OT::IGF DELIVERY ORDER FOR EAB CONTRACT SS00-08-60045 - NEVADA	(\$3,988.39)	(\$3,988.39)	2015	8/25/2015	SS001330442	SS000860045	1	OTHER THAN SMALL BUSINESS
SOUTH DAKOTA STATE OF (0366)	ELECTRONIC BIRTH REGISTRATION - SOUTH DAKOTA	(\$3,994.92)	(\$3,994.92)	2015	1/26/2015	SS001130238	SS000860060	1	OTHER THAN SMALL BUSINESS
KONIAG SERVICES INC	IGF::CT::IGF CRITICAL FUNCTIONS	(\$4,000.00)	(\$4,000.00)	2016	12/9/2015		SS000960009	1	SMALL BUSINESS
KONIAG SERVICES INC	IGF::CT::IGF CRITICAL FUNCTIONS DSUSF - CONTRACTOR SERVICES (4) TO SUPPORT ENVIRONMENTAL AREAS (ELEC, HVAC ETC.).	(\$4,000.00)	(\$4,000.00)	2016	12/2/2015		SS000960009	1	SMALL BUSINESS
HEALTH VERMONT DEPARTMENT OF	IGF::OT::IGF OTHER FUNCTIONS ENUMERATION AT BIRTH VERMONT	(\$4,076.24)	(\$4,076.24)	2016	10/2/2015	SS001330707	SS000860064	1	OTHER THAN SMALL BUSINESS
KONIAG SERVICES INC	CONTRACT CLOSEOUT	(\$4,245.04)	(\$4,245.04)	2015	5/19/2015		SS000960009	2	SMALL BUSINESS



Sole Source Contracts  
(December 1, 2014 - December 1, 2016)

Vendor Name	Description of Requirement	Action Obligation	Base and All Options Value	Fiscal Year	Date Signed	PO/Delivery Order/Task Order/Call#	Parent Contract	Mod #	Contracting Officers Business Size Selection
STATE OF SOUTH CAROLINA (0286)	IGF::OT::IGF OTHER FUNCTIONS DELIVERY ORDER FOR EAB CONTRACT SS00-08-60059 - SOUTH CAROLINA	(\$4,272.02)	(\$4,272.02)	2015	1/26/2015	SS001330179	SS000860059	1	OTHER THAN SMALL BUSINESS
HEALTH WASHINGTON DEPARTMENT OF	IGF::OT::IGF OTHER FUNCTIONS DELIVERY ORDER FOR EAB WASHINGTON	(\$4,292.10)	(\$4,292.10)	2016	10/6/2015	SS001330135	SS000860066	1	OTHER THAN SMALL BUSINESS
SOUTH DAKOTA STATE OF (0366)	BIRTH RECORDS - STATE OF SOUTH DAKOTA - CONTRACT	(\$4,389.24)	(\$4,389.24)	2015	1/26/2015	SS001030342	SS000860060	1	OTHER THAN SMALL BUSINESS
HEALTH AND HUMAN SERVICES ARKANSAS DEPARTMENT OF (7358)	IGF::OT::IGF TO DEOBLIGATE ALL FUNDS REMAINING UNDER CONTRACT SS00-08-60020,TASK ORDER SS00-13-30435.	(\$4,425.13)	(\$4,425.13)	2015	5/14/2015	SS001330435	SS000860020	1	OTHER THAN SMALL BUSINESS
STATE OF NEW MEXICO (0565)	IGF::OT::IGF OTHER FUNCTIONS ENUMERATION OF BIRTH UNITS - NEW MEXICO	(\$4,563.18)	(\$4,563.18)	2016	10/20/2015	SS001330162	SS000860048	1	OTHER THAN SMALL BUSINESS
HEALTH AND HUMAN SERVICES ARKANSAS DEPARTMENT OF (7358)	IGF::OT::IGF OTHER FUNCTIONS ENUMERATION OF BIRTH UNITS FOR ARKANSAS	(\$4,573.22)	(\$4,573.22)	2015	5/14/2015	SS001330152	SS000860020	1	OTHER THAN SMALL BUSINESS
HERMAN MILLER, INC.	DURHAM, NC #B328 DESIGN, INSTALLATION AND PRODU	(\$4,636.77)	(\$4,636.77)	2015	3/31/2015	SS001431634	SS001260003	2	OTHER THAN SMALL BUSINESS
SOUTH DAKOTA STATE OF (0366)	IGF::OT::IGF OTHER FUNCTIONS DELIVERY ORDER FOR EAB CONTRACT SS00-08-60060 - SOUTH DAKOTA	(\$4,638.48)	(\$4,638.48)	2015	1/28/2015	SS001330705	SS000860060	1	OTHER THAN SMALL BUSINESS
LOCUM, INC.	IGF::CL::IGF CLOSELY ASSOCIATED - MODIFICATION TO	(\$4,680.00)	(\$4,680.00)	2016	8/30/2016		SS08164C015	1	SMALL BUSINESS
HEALTH DEPARTMENT OKLAHOMA STATE (7987)	IGF::OT::IGF OTHER FUNCTIONS DELIVERY ORDER FOR EAB - OKLAHOMA	(\$4,748.92)	(\$4,748.92)	2015	9/8/2015	SS001330137	SS000860054	1	OTHER THAN SMALL BUSINESS
HERMAN MILLER, INC.	RIO PIEDRAS, PR A271 PRODUCT AND OCEAN FREIGHT M	(\$4,892.76)	(\$4,892.76)	2016	5/12/2016	SS001530068	SS001260003	3	OTHER THAN SMALL BUSINESS
MEDICAL AND HEALTH RESEARCH ASSOCIATION OF NEW YORK CITY INCORPORATED	IGF::OT::IGF OTHER FUNCTIONS ENUMERATION AT BIRTH - NEW YORK CITY	(\$4,899.52)	(\$4,899.52)	2016	10/21/2015	SS001330103	SS000860049	1	OTHER THAN SMALL BUSINESS
STATE OF WISCONSIN (6469)	IGF::OT::IGF OTHER FUNCTIONS DELIVERY ORDER FOR EAB CONTRACT SS00-08-60068 - WISCONSIN	(\$5,017.49)	(\$5,017.49)	2016	10/21/2015	SS001330463	SS000860068	1	OTHER THAN SMALL BUSINESS
HEALTH AND HUMAN SERVICES SYSTEM NEBRASKA	BIRTH RECORDS - STATE OF NEBRASKA	(\$5,055.21)	(\$5,055.21)	2015	12/5/2014	SS001030315	SS000860044	1	OTHER THAN SMALL BUSINESS
HERMAN MILLER, INC.	MT. PLEASANT TX FO #XI22. INSTALLATION OF A P-01 W	(\$5,098.16)	(\$5,098.16)	2016	6/16/2016	SS001630136	SS001260003	1	OTHER THAN SMALL BUSINESS
HEALTH MENTAL HYGIENE MD DEPT	IGF::OT::IGF ENUMERATION AT BIRTH MARYLAND	(\$5,112.87)	(\$5,112.87)	2015	12/2/2014	SS001330352	SS000860037	1	OTHER THAN SMALL BUSINESS
HERMAN MILLER, INC.	GAINESVILLE, GA A612 DESIGN, INSTALLATION AND PRO	(\$5,158.02)	(\$5,158.02)	2015	3/30/2015	SS001431565	SS001260003	2	OTHER THAN SMALL BUSINESS
PUBLIC HEALTH AND HUMAN SERVICES MONTANA DEPARTMENT OF	ELECTRONIC DEATH REGISTRATION-DEATH MATCH- MOI	(\$5,359.81)	(\$5,359.81)	2016	8/26/2016	SS001130292	SS000660063	1	OTHER THAN SMALL BUSINESS
HEALTH VERMONT DEPARTMENT OF	BIRTH RECORDS - STATE OF VERMONT - CONTRACT YEAR	(\$5,377.53)	(\$5,377.53)	2016	10/2/2015	SS001030348	SS000860064	1	OTHER THAN SMALL BUSINESS
HEALTH AND HUMAN RESOURCES WEST VIRGINIA DEPARTMENT OF	ELECTRONIC BIRTH REGISTRATION - WEST VIRGINIA	(\$5,386.43)	(\$5,386.43)	2016	10/7/2015	SS001230109	SS000860067	1	OTHER THAN SMALL BUSINESS
HEALTH AND HUMAN SERVICES MAINE DEPARTMENT OF	ELECTRONIC BIRTH REGISTRATION - MAINE.	(\$5,482.98)	(\$5,482.98)	2015	12/2/2014	SS001130164	SS000860036	1	OTHER THAN SMALL BUSINESS
HERMAN MILLER, INC.	B926 KITSAP/SILVERDALE, WA - DESIGN SERVICES, INSTA	(\$5,486.37)	(\$5,486.37)	2015	8/20/2015	SS001530039	SS001260003	2	OTHER THAN SMALL BUSINESS
LOCUM, INC.	IGF::CL::IGF CLOSELY ASSOCIATED - DECREASE OF FUN	(\$5,520.00)	(\$5,520.00)	2016	9/23/2016		SS07164C014	1	SMALL BUSINESS
HEALTH INDIANA DEPARTMENT OF	ELECTRONIC DEATH REGISTRATION-DEATH MATCH- INDI	(\$5,595.72)	(\$5,595.72)	2016	9/2/2016	SS001130360	SS000860071	2	OTHER THAN SMALL BUSINESS
HERMAN MILLER, INC.	PORTLAND, OR CBT28 ODAR - RECONFIGURATION SYSTE	(\$5,600.54)	(\$5,600.54)	2015	8/4/2015	SS001530240	SS001260003	1	OTHER THAN SMALL BUSINESS
NEOPOST USA INC.	IGF::OT::IGF STANDARD MAINTENANCE FOR NEOPOST F	(\$5,634.12)	(\$5,634.12)	2016	8/17/2016	SS041650003		2	OTHER THAN SMALL BUSINESS
HEALTH RHODE ISLAND DEPARTMENT OF	BIRTH RECORDS - STATE OF RHODE ISLAND - CONTRACT	(\$5,686.95)	(\$5,686.95)	2015	1/26/2015	SS001130170	SS000860058	1	OTHER THAN SMALL BUSINESS
HERMAN MILLER, INC.	KISSIMMEE, FL AA16 DESIGN, INSTALLATION AND PRODU	(\$5,857.91)	(\$5,857.91)	2015	8/20/2015	SS001530349	SS001260003	1	OTHER THAN SMALL BUSINESS
DISTRICT OF COLUMBIA GOVERNMENT	ELECTRONIC BIRTH REGISTRATION - DIS. OF COLUMBIA.	(\$5,951.94)	(\$5,951.94)	2015	1/30/2015	SS001130149	SS000860025	1	OTHER THAN SMALL BUSINESS
HEALTH WASHINGTON DEPARTMENT OF	ELECTRONIC BIRTH REGISTRATION - WASHINGTON	(\$5,982.81)	(\$5,982.81)	2016	10/5/2015	SS001230142	SS000860066	1	OTHER THAN SMALL BUSINESS
VINOD SHAH	IGF::CL::IGF MODIFICATION TO DE-OBLIGATE FUNDS	(\$6,004.80)	(\$6,004.80)	2016	5/24/2016		SS04164C055	1	SMALL BUSINESS
GONZALEZ, JOSE	IGF::CL::IGF REGION 2 MEDICAL CONSULTANTS. REVIEWS BY MEDICAL CONSULTANT OF DISABILITY CLAIM CASE FILES FOR AGENCY DISABILITY PROGRAM. MODIFICATION TO INCREASE CASE REVIEWS.	(\$6,020.00)	(\$6,020.00)	2016	7/18/2016		SS021240008	4	SMALL BUSINESS
DIVISION OF VITAL RECORDS	IGF::OT::IGF OTHER FUNCTIONS ENUMERATION AT BIRTH - VIRGINIA	(\$6,084.24)	(\$6,084.24)	2015	9/9/2015	SS001330127	SS000860065	1	OTHER THAN SMALL BUSINESS
HUMAN SERVICES OREGON DEPARTMENT OF	IGF::OT::IGF OTHER FUNCTIONS DELIVERY ORDER FOR EAB - OREGON	(\$6,104.32)	(\$6,104.32)	2015	1/26/2015	SS001330131	SS000860055	1	OTHER THAN SMALL BUSINESS
HEALTH AND FAMILY SERVIES KENTUCKY CABINET FOR	BIRTH RECORDS - STATE OF KENTUCKY - CONTRACT YEAR	(\$6,114.60)	(\$6,114.60)	2015	3/19/2015	SS001030298	SS000860034	1	OTHER THAN SMALL BUSINESS
HEALTH AND ENVIRONMENT KANSAS DEPARTMENT OF	BIRTH RECORDS - STATE OF KANSAS - CONTRACT YEAR II	(\$6,126.45)	(\$6,126.45)	2015	3/19/2015	SS001030364	SS000860033	1	OTHER THAN SMALL BUSINESS



Sole Source Contracts  
(December 1, 2014 - December 1, 2016)

Vendor Name	Description of Requirement	Action Obligation	Base and All Options Value	Fiscal Year	Date Signed	PO/Delivery Order/Task Order/Call#	Parent Contract	Mod #	Contracting Officers Business Size Selection
HEALTH AND FAMILY SERVCIES KENTUCKY CABINET FOR	IGF::OT::IGF OTHER FUNCTIONS DELIVERY ORDER FOR EAB CONTRACT SS00-08-60034 - KENTUCKY	(\$6,136.95)	(\$6,136.95)	2015	3/19/2015	SS001330172	SS000860034	1	OTHER THAN SMALL BUSINESS
HUMAN RESOURCES NEVADA DEPARTMENT OF	IGF::OT::IGF OTHER FUNCTIONS ENUMERATION OF BIRTH UNITS - NEVADA	(\$6,352.81)	(\$6,352.81)	2015	8/25/2015	SS001330161	SS000860045	1	OTHER THAN SMALL BUSINESS
STATE OF ALABAMA DEPARTMENT OF PUBLIC HEALTH	IGF::OT::IGF OTHER FUNCTIONS DELIVERY ORDER FOR EAB CONTRACT SS00-08-60017 - ALABAMA	(\$6,377.91)	(\$6,377.91)	2015	4/16/2015	SS001330444	SS000860017	1	OTHER THAN SMALL BUSINESS
HEALTH RHODE ISLAND DEPARTMENT OF	ELECTRONIC BIRTH REGISTRATION - RHODE ISLAND	(\$6,438.10)	(\$6,438.10)	2015	1/26/2015	SS001230126	SS000860058	1	OTHER THAN SMALL BUSINESS
HERMAN MILLER, INC.	FREEPORT, NY A151 - DESIGN, INSTALLATION AND PROD	(\$6,513.86)	(\$6,513.86)	2015	12/16/2014	SS001431596	SS001260003	1	OTHER THAN SMALL BUSINESS
HERMAN MILLER, INC.	GERMANTOWN, PA B218 - DESIGN, INSTALLATION AND #	(\$6,546.71)	(\$6,546.71)	2015	7/20/2015	SS001530326	SS001260003	1	OTHER THAN SMALL BUSINESS
DEPARTMENT OF HEALTH ARKANSAS (7358)	ELECTRONIC DEATH REGISTRATION-DEATH MATCH-ARKA	(\$6,615.29)	(\$6,615.29)	2016	8/22/2016	SS001130323	SS000660021	1	OTHER THAN SMALL BUSINESS
DEPARTMENT OF HEALTH UTAH (0545)	IGF::OT::IGF OTHER FUNCTIONS DELIVERY ORDER FOR EAB - UTAH	(\$6,618.87)	(\$6,618.87)	2015	9/25/2015	SS001330133	SS000860063	1	OTHER THAN SMALL BUSINESS
HEALTH AND WELFARE IDAHO DEPARTMENT OF	BIRTH RECORDS - STATE OF IDAHO	(\$6,628.89)	(\$6,628.89)	2015	12/1/2014	SS001030293	SS000860029	1	OTHER THAN SMALL BUSINESS
COBBS, WALTER	IGF::CL::IGF REGION 3 REGIONAL MEDICAL CONTRACTOR. THE PURPOSE OF THIS MODIFICATION TO DE-OBLIGATE FUNDING FOR 83 INDEPENDENT CASE REVIEW FOR THE SUBJECT CALL ORDER. IGF::CL::IGF	(\$6,640.00)	(\$6,640.00)	2016	8/24/2016	3 SS03154C023		1	SMALL BUSINESS
HERMAN MILLER, INC.	B167 KAPOLEI, HI - DESIGN, INSTALLATION AND PRODU	(\$6,673.30)	(\$6,673.30)	2016	3/1/2016	SS001530499	SS001260003	1	OTHER THAN SMALL BUSINESS
HERMAN MILLER, INC.	CONWAY, SC I592 DESIGN, INSTALLATION AND PRODUCT	(\$6,800.98)	(\$6,800.98)	2015	1/12/2015	SS001431668	SS001260003	1	OTHER THAN SMALL BUSINESS
HERMAN MILLER, INC.	SYSTEMS FURNITURE - SAN DIEGO, CA TSC IS MOVING TO	(\$6,810.74)	(\$6,810.74)	2015	5/29/2015	SS001431443	SS001260003	1	OTHER THAN SMALL BUSINESS
PUBLIC HEALTH MASSACHUSETTS DEPT OF	IGF::OT::IGF ENUMERATION AT BIRTH MASSACHUSETTS	(\$6,814.65)	(\$6,814.65)	2015	12/2/2014	SS001330346	SS000860038	1	OTHER THAN SMALL BUSINESS
HEALTH AND HUMAN RESOURCES WEST VIRGINIA DEPARTMENT OF	BIRTH RECORDS - STATE OF WEST VIRGINIA - CONTRACT	(\$6,867.00)	(\$6,867.00)	2016	10/7/2015	SS001130208	SS000860067	1	OTHER THAN SMALL BUSINESS
COMMUNITY HEALTH MICHIGAN DEPARTMENT OF	IGF::OT::IGF OTHER FUNCTIONS DELIVERY ORDER FOR EAB CONTRACT SS00-08-60039 - MICHIGAN	(\$6,872.38)	(\$6,872.38)	2015	5/14/2015	SS001330455	SS000860039	1	OTHER THAN SMALL BUSINESS
MASSACHUSETTS MEDICAL SOCIETY	IGF::OT::IGF MODIFICATION FOR THE PARTIAL TERMINATION OF THIS ORDER.	(\$6,878.00)	(\$6,878.00)	2016	8/25/2016	SS001650028		1	OTHER THAN SMALL BUSINESS
HEALTH AND HUMAN SERVICES MAINE DEPARTMENT OF	ELECTRONIC BIRTH REGISTRATION - MAINE	(\$6,920.34)	(\$6,920.34)	2015	12/2/2014	SS001230094	SS000860036	1	OTHER THAN SMALL BUSINESS
KONIAG SERVICES INC	CONTRACT CLOSEOUT	(\$6,993.27)	(\$6,993.27)	2015	5/19/2015	12 SS000960009		1	SMALL BUSINESS
WEISBERG, ROBERT A MD	IGF::CL::IGF THE PURPOSE OF THIS MODIFICATION IS TO DE- OBLIGATE FUNDING FOR INDEPENDENT CASE REVIEWS UNDER THE SUBJECT CALL ORDER.	(\$7,040.00)	(\$7,040.00)	2016	8/25/2016	2 SS03154C007		1	SMALL BUSINESS
MEDICAL AND HEALTH RESEARCH ASSOCIATION OF NEW YORK CITY INCORPORATED	BIRTH RECORDS - STATE OF NEW YORK CITY - CONTRACT	(\$7,043.64)	(\$7,043.64)	2016	10/20/2015	SS001030321	SS000860049	1	OTHER THAN SMALL BUSINESS
DISTRICT OF COLUMBIA GOVERNMENT	ELECTRONIC BIRTH REGISTRATION - DISTRICT OF COLUM	(\$7,052.12)	(\$7,052.12)	2015	1/30/2015	SS001230089	SS000860025	1	OTHER THAN SMALL BUSINESS
HERMAN MILLER, INC.	LUMBERTON, NC B338 DESIGN, INSTALLATION AND PRO	(\$7,184.47)	(\$7,184.47)	2015	5/6/2015	SS001431713	SS001260003	2	OTHER THAN SMALL BUSINESS
DISTRICT OF COLUMBIA GOVERNMENT	IGF::OT::IGF OTHER FUNCTIONS ENUMERATION AT BIRTH DISTRICT OF COLUMBIA	(\$7,251.39)	(\$7,251.39)	2015	1/30/2015	SS001330719	SS000860025	1	OTHER THAN SMALL BUSINESS
HERMAN MILLER, INC.	CONCORD, NH #A010 DESIGN, INSTALLATION AND PROD	(\$7,254.70)	(\$7,254.70)	2015	5/29/2015	SS001530141	SS001260003	1	OTHER THAN SMALL BUSINESS
HERMAN MILLER, INC.	EVANSVILLE, IN RX84 - DESIGN, INSTALLATION AND PRO	(\$7,431.15)	(\$7,431.15)	2016	4/13/2016	SS001530255	SS001260003	1	OTHER THAN SMALL BUSINESS
DISTRICT OF COLUMBIA GOVERNMENT	BIRTH RECORDS - DISTRICT OF COLUMBIA - CONTRACT Y	(\$7,474.98)	(\$7,474.98)	2015	1/30/2015	SS001030282	SS000860025	1	OTHER THAN SMALL BUSINESS
KONIAG SERVICES INC	SS00-09-60009 SYSTEMS OPERATION SUPPORT SERVICES	(\$7,478.05)	(\$7,478.05)	2016	12/9/2015	9 SS000960009		2	SMALL BUSINESS
STATE OF WISCONSIN (6469)	IGF::OT::IGF OTHER FUNCTIONS DELIVERY ORDER FOR EAB CONTRACT SS00-08-60068 - WISCONSIN	(\$7,540.04)	(\$7,540.04)	2016	10/22/2015	SS001330182	SS000860068	1	OTHER THAN SMALL BUSINESS
HEALTH WASHINGTON DEPARTMENT OF	BIRTH RECORDS - STATE OF WASHINGTON - CONTRACT Y	(\$7,667.97)	(\$7,667.97)	2016	10/5/2015	SS001130156	SS000860066	1	OTHER THAN SMALL BUSINESS
PUBLIC HEALTH MASSACHUSETTS DEPT OF	IGF::CL::IGF ENUMERATION AT BIRTH - MASSACHUSETTS	(\$7,683.11)	(\$7,683.11)	2015	12/2/2014	SS001330105	SS000860038	1	OTHER THAN SMALL BUSINESS
DIVISION OF VITAL RECORDS	IGF::OT::IGF OTHER FUNCTIONS ENUMERATION AT BIRTH VIRGINIA	(\$7,685.62)	(\$7,685.62)	2015	9/9/2015	SS001330365	SS000860065	1	OTHER THAN SMALL BUSINESS
HEALTH AND HUMAN RESOURCES WEST VIRGINIA DEPARTMENT OF	BIRTH RECORDS - STATE OF WEST VIRGINIA - CONTRACT	(\$7,714.35)	(\$7,714.35)	2016	10/7/2015	SS001030353	SS000860067	1	OTHER THAN SMALL BUSINESS
HEALTH RHODE ISLAND DEPARTMENT OF	BIRTH RECORDS - STATE OF RHODE ISLAND - CONTRACT	(\$7,721.46)	(\$7,721.46)	2015	1/26/2015	SS001030340	SS000860058	1	OTHER THAN SMALL BUSINESS

Sole Source Contracts  
(December 1, 2014 - December 1, 2016)

Vendor Name	Description of Requirement	Action Obligation	Base and All Options Value	Fiscal Year	Date Signed	PO/Delivery Order/Task Order/Call#	Parent Contract	Mod #	Contracting Officers Business Size Selection
KONIAG SERVICES INC	CONTRACT CLOSEOUT IGF::OT::IGF	(\$7,810.58)	(\$7,810.58)	2016	12/2/2015		37 SS000960009		1 SMALL BUSINESS
UNITED STATES POSTAL SERVICE	IGF::CT::IGF ANNUAL RENEWAL POST OFFICES BOXES	(\$7,920.00)	(\$7,920.00)	2016	10/7/2015	SS051550009			1 OTHER THAN SMALL BUSINESS
GOLDSMITH, JOYCE MD	IGF::CL::IGF THE PURPOSE OF THIS MODIFICATION IS TO DE- OBLIGATE FUNDING FOR THE SUBJECT CALL ORDER.	(\$7,950.00)	(\$7,950.00)	2016	8/24/2016		2 SS03154C009		1 SMALL BUSINESS
HEALTH AND WELFARE IDAHO DEPARTMENT OF	ELECTRONIC BIRTH REGISTRATION - IDAHO	(\$8,036.91)	(\$8,036.91)	2015	12/1/2014	SS001230091	SS000860029		1 OTHER THAN SMALL BUSINESS
HUMAN RESOURCES NEVADA DEPARTMENT OF	BIRTH RECORDS - STATE OF NEVADA	(\$8,050.99)	(\$8,050.99)	2015	8/20/2015	SS001030317	SS000860045		1 OTHER THAN SMALL BUSINESS
HERMAN MILLER, INC.	FT. SMITH, AR ODAR OFFICE #XX55 SYSTEMS FURNITURE	(\$8,087.24)	(\$8,087.24)	2016	7/27/2016	SS001630057	SS001260003		2 OTHER THAN SMALL BUSINESS
SABREE, INC.	IGF::OT::IGF  CAGE CODE: 4KUQ1  ISSUE FORMAL NOTICE TO PROCEED AND MODIFY STATEMENT OF WORK.	(\$8,137.50)	(\$8,137.50)	2015	2/10/2015	SS001530123	SS001461113		1 SMALL BUSINESS
NORTH CAROLINA STATE LABORATORY OF PUBLIC HEALTH	IGF::OT::IGF OTHER FUNCTIONS DELIVERY ORDER FOR EAB CONTRACT SS00-08-60051 - NORTH CAROLINA	(\$8,247.86)	(\$8,247.86)	2015	8/14/2015	SS001330176	SS000860051		1 OTHER THAN SMALL BUSINESS
WELCH CONSULTING, LTD	IGF::CT::IGF: EXPERT WITNESS SERVICES FOR A CLASS AC	\$50,200.00	(\$8,300.00)	2015	8/5/2015	SS001360024			5 OTHER THAN SMALL BUSINESS
MEDICAL AND HEALTH RESEARCH ASSOCIATION OF NEW YORK CITY INCORPORATED	IGF::OT::IGF OTHER FUNCTIONS ENUMERATION AT BIRTH FOR NEW YORK CITY	(\$8,448.66)	(\$8,448.66)	2016	10/20/2015	SS001330345	SS000860049		1 OTHER THAN SMALL BUSINESS
HEALTH MISSISSIPPI DEPARTMENT OF	IGF::OT::IGF OTHER FUNCTIONS DELIVERY ORDER FOR EAB CONTRACT SS00-08-60041 - MISSISSIPPI	(\$8,466.23)	(\$8,466.23)	2015	6/18/2015	SS001330457	SS000860041		1 OTHER THAN SMALL BUSINESS
CORTEZ, JENNIFER A	IGF::CL::IGF REGION 2 MEDICAL CONSULTANTS. REVIEWS BY MEDICAL CONSULTANT OF DISABILITY CLAIM CASE FILES FOR AGENCY DISABILITY PROGRAM. MODIFICATION TO DE-OBLIGATE FUNDING.	(\$8,466.50)	(\$8,466.50)	2016	6/6/2016		5 SS021240005		3 SMALL BUSINESS
HEALTH AND WELFARE IDAHO DEPARTMENT OF	BIRTH RECORDS - STATE OF IDAHO	(\$8,503.83)	(\$8,503.83)	2015	12/1/2014	SS001130194	SS000860029		1 OTHER THAN SMALL BUSINESS
HEALTH AND HUMAN SERVICES MAINE DEPARTMENT OF	BIRTH RECORDS - STATE OF MAINE	(\$8,529.63)	(\$8,529.63)	2015	12/2/2014	SS001030303	SS000860036		1 OTHER THAN SMALL BUSINESS
HEALTH MENTAL HYGIENE MD DEPT	IGF::CL::IGF ENUMERATION AT BIRTH - MARYLAND	(\$8,544.04)	(\$8,544.04)	2015	12/2/2014	SS001330114	SS000860037		1 OTHER THAN SMALL BUSINESS
HUMAN RESOURCES NEVADA DEPARTMENT OF	BIRTH RECORDS - STATE OF NEVADA - CONTRACT YEAR IV	(\$8,608.44)	(\$8,608.44)	2015	8/20/2015	SS001130207	SS000860045		1 OTHER THAN SMALL BUSINESS
HERMAN MILLER, INC.	KOSCIUSKO, MS #CB15 - DESIGN, INSTALLATION AND PR	(\$8,644.52)	(\$8,644.52)	2015	9/10/2015	SS001530325	SS001260003		1 OTHER THAN SMALL BUSINESS
HEALTH AND ENVIRONMENT KANSAS DEPARTMENT OF	ELECTRONIC BIRTH REGISTRATION - KANSAS	(\$8,702.31)	(\$8,702.31)	2015	3/19/2015	SS001230093	SS000860033		1 OTHER THAN SMALL BUSINESS
HEALTH RHODE ISLAND DEPARTMENT OF	IGF::OT::IGF OTHER FUNCTIONS ENUMERATION AT BIRTH - RHODE ISLAND	(\$8,712.21)	(\$8,712.21)	2015	1/26/2015	SS001330711	SS000860058		1 OTHER THAN SMALL BUSINESS
HEALTH AND FAMILY SERVCIES KENTUCKY CABINET FOR	IGF::OT::IGF OTHER FUNCTIONS DELIVERY ORDER FOR EAB CONTRACT SS00-08-60034 - KENTUCKY	(\$8,714.72)	(\$8,714.72)	2015	3/19/2015	SS001330454	SS000860034		2 OTHER THAN SMALL BUSINESS
STATE OF SOUTH CAROLINA (0286)	IGF::OT::IGF OTHER FUNCTIONS DELIVERY ORDER FOR EAB CONTRACT SS00-08-60059 - SOUTH CAROLINA	(\$8,777.47)	(\$8,777.47)	2015	1/26/2015	SS001330460	SS000860059		1 OTHER THAN SMALL BUSINESS
MARIE T TURNER DR	IGF::CL::IGF CLOSELY ASSOCIATED MODIFICATION DECUCTS 113 INDEPENDENT CASE REVIEWS AND ASSOCIATED FUNDS AT \$77.90 PER RATE. TOTAL DEDUCTION \$8,802.70.	(\$8,802.70)	(\$8,802.70)	2015	4/30/2015		8 SS011140013		1 SMALL BUSINESS
UNITED STATES POSTAL SERVICE	IGF::CT::IGF RENEWAL OF PO BOXES AND CALL SERVICE F	(\$8,908.00)	(\$8,908.00)	2016	9/21/2016	SS051650008			1 OTHER THAN SMALL BUSINESS
NEOPOST USA INC.	IGF::CT::IGF EXCHANGE 1 METER FOR ANOTHER AND DISCONTINUE RENTAL OF 3 OTHER METERS.	(\$1,277.28)	(\$8,940.96)	2016	8/30/2016	SS001550057			4 OTHER THAN SMALL BUSINESS
HEALTH AND HUMAN SERVICES MAINE DEPARTMENT OF	IGF::OT::IGF ENUMERATION AT BIRTH - MAINE	(\$9,061.10)	(\$9,061.10)	2015	12/2/2014	SS001330722	SS000860036		1 OTHER THAN SMALL BUSINESS
HEALTH AND ENVIRONMENT KANSAS DEPARTMENT OF	ELECTRONIC BIRTH REGISTRATION - KANSAS.	(\$9,169.11)	(\$9,169.11)	2015	3/19/2015	SS001130158	SS000860033		1 OTHER THAN SMALL BUSINESS
CONCISE INC.	TASK ORDER FOR INSTALLATION DATA CABLE FOR WIREL	(\$9,203.86)	(\$9,203.86)	2016	4/7/2016	SS001130747	SS000960098		1 SMALL BUSINESS
HERMAN MILLER, INC.	DECATUR, GA A621 DESIGN, INSTALLATION AND PRODU	(\$9,321.41)	(\$9,321.41)	2015	2/12/2015	SS001431473	SS001260003		1 OTHER THAN SMALL BUSINESS

Sole Source Contracts  
(December 1, 2014 - December 1, 2016)

Vendor Name	Description of Requirement	Action Obligation	Base and All Options Value	Fiscal Year	Date Signed	PO/Delivery Order/Task Order/Call#	Parent Contract	Mod #	Contracting Officers Business Size Selection
HEALTH, VERMONT DEPARTMENT OF	ELECTRONIC DEATH REGISTRATION - VERMONT  THE PURPOSE OF MODIFICATION # 2 IS TO ADD FUNDS TO THE DELIVERY ORDER TO COVER ADDITIONAL COSTS THAT ARE THE RESULT OF PROCESSING MORE ELECTRONIC DEATH RECORDS THAN ORIGINALLY ESTIMATED.	(\$9,334.23)	(\$9,334.23)	2016	8/26/2016	SS001130268	SS000860127	3	OTHER THAN SMALL BUSINESS
SANDELL, PHYLLIS	IGF::CL::IGF CLOSELY ASSOCIATED MODIFICATION TO DEDUCT 119 INDEPENDENT DISABILITY CASE REVIEWS FROM THE CALL ORDER.	(\$9,409.33)	(\$9,409.33)	2016	5/3/2016	9	SS011140032	1	SMALL BUSINESS
COMMUNITY HEALTH MICHIGAN DEPARTMENT OF	IGF::OT::IGF OTHER FUNCTIONS DELIVERY ORDER FOR EAB CONTRACT SS00-08-60039 - MICHIGAN	(\$9,527.96)	(\$9,527.96)	2015	5/15/2015	SS001330173	SS000860039	1	OTHER THAN SMALL BUSINESS
UPCHURCH, JAMES C	IGF::CL::IGF DE-OBLIGATE FUNDS FOR MENTORING	(\$9,663.00)	(\$9,663.00)	2016	8/24/2016	2	SS04164C024	1	SMALL BUSINESS
HERMAN MILLER, INC.	MIDDLEBORO, KY ODAR RX47 PRODUCT, DESIGN, AND IN	(\$9,704.31)	(\$9,704.31)	2015	12/16/2014	SS001331066	SS001260003	1	OTHER THAN SMALL BUSINESS
STATE OF ALABAMA DEPARTMENT OF PUBLIC HEALTH	IGF::OT::IGF OTHER FUNCTIONS DELIVERY ORDER FOR EAB CONTRACT SS00-08-60017 - ALABAMA	(\$10,022.43)	(\$10,022.43)	2015	4/16/2015	SS001330144	SS000860017	1	OTHER THAN SMALL BUSINESS
HEALTH AND HUMAN SERVICES ARKANSAS DEPARTMENT OF (7358)	ELECTRONIC BIRTH REGISTRATION - ARKANSAS	(\$10,177.85)	(\$10,177.85)	2015	5/14/2015	SS001230085	SS000860020	1	OTHER THAN SMALL BUSINESS
HEALTH DEPARTMENT OKLAHOMA STATE (7987)	BIRTH RECORDS - STATE OF OKLAHOMA - CONTRACT YEAR	(\$10,193.37)	(\$10,193.37)	2015	8/26/2015	SS001030334	SS000860054	1	OTHER THAN SMALL BUSINESS
HEALTH MENTAL HYGIENE MD DEPT	BIRTH RECORDS - STATE OF MARYLAND	(\$10,251.57)	(\$10,251.57)	2015	12/2/2014	SS001130205	SS000860037	1	OTHER THAN SMALL BUSINESS
T C G MANAGEMENT CORP	IGF::OT::IGF CONTRACT CLOSEOUT	(\$10,276.56)	(\$10,276.56)	2015	4/1/2015	SS001360041		2	SMALL BUSINESS
HEALTH RESEARCH INCORPORATED	-ELECTRONIC DEATH REGISTRATION (EDR) FOR THE STAT	(\$10,376.25)	(\$10,376.25)	2016	9/2/2016	SS001130298	SS000660042	1	OTHER THAN SMALL BUSINESS
HERMAN MILLER, INC.	ELKINS PARKS, PA MT26 ODAR DESIGN, INSTALLATION A	(\$10,446.66)	(\$10,446.66)	2015	3/18/2015	SS001530054	SS001260003	1	OTHER THAN SMALL BUSINESS
HEALTH DEPARTMENT OKLAHOMA STATE (7987)	ELECTRONIC BIRTH REGISTRATION - OKLAHOMA	(\$10,547.58)	(\$10,547.58)	2015	8/27/2015	SS001230141	SS000860054	1	OTHER THAN SMALL BUSINESS
HERMAN MILLER, INC.	JUNEAU, AK C996 - DESIGN, PRODUCT ESTIMATE AND IN	(\$10,551.64)	(\$10,551.64)	2015	8/20/2015	SS001530156	SS001260003	1	OTHER THAN SMALL BUSINESS
HEALTH AND HUMAN SERVICES ARKANSAS DEPARTMENT OF (7358)	BIRTH RECORDS - STATE OF ARKANSAS - CONTRACT YEAR	(\$10,579.68)	(\$10,579.68)	2015	5/14/2015	SS001030223	SS000860020	1	OTHER THAN SMALL BUSINESS
PUBLIC HEALTH IOWA DEPARTMENT OF	ELECTRONIC BIRTH REGISTRATION - IOWA	(\$10,666.34)	(\$10,666.34)	2015	3/18/2015	SS001230092	SS000860032	1	OTHER THAN SMALL BUSINESS
HEALTH AND HUMAN RESOURCES WEST VIRGINIA DEPARTMENT OF	IGF::OT::IGF OTHER FUNCTIONS WEST VIRGINIA EAB DELIVERY ORDER S00-08-60067	(\$10,707.66)	(\$10,707.66)	2016	10/7/2015	SS001330683	SS000860067	1	OTHER THAN SMALL BUSINESS
SABREE, INC.	IGF::OT::IGF  CAGE CODE: 4KUQ1  ISSUE FORMAL NOTICE TO PROCEED AND MODIFY STATEMENT OF WORK	(\$10,730.70)	(\$10,730.70)	2015	1/12/2015	SS001530082	SS001461113	1	SMALL BUSINESS
HEALTH RESEARCH INCORPORATED	IGF::OT::IGF OTHER FUNCTIONS ENUMERATION AT BIRTH - NEW YORK	(\$10,845.71)	(\$10,845.71)	2015	1/22/2015	SS001330357	SS000860050	1	OTHER THAN SMALL BUSINESS
HEALTH RESEARCH INCORPORATED	IGF::OT::IGF OTHER FUNCTIONS ENUMERATION AT BIRTH - NEW YORK	(\$10,845.71)	(\$10,845.71)	2015	1/23/2015	SS001330116	SS000860050	1	OTHER THAN SMALL BUSINESS
DEPARTMENT OF HEALTH OHIO (4820)	IGF::OT::IGF OTHER FUNCTIONS ENUMERATION AT BIRTH FOR OHIO	(\$10,885.87)	(\$10,885.87)	2016	10/21/2015	SS001330358	SS000860053	1	OTHER THAN SMALL BUSINESS
WASHINGTON STATE DEPARTMENT OF HEALTH	NON-ELECTRONIC DEATH REGISTRATION - WASHINGTON STATE	(\$10,967.26)	(\$10,967.26)	2016	9/9/2016	SS001130399	SS000660069	2	OTHER THAN SMALL BUSINESS
STATE OF NEW MEXICO (0565)	BIRTH RECORDS - NEW MEXICO - CONTRACT YEAR IV.	(\$10,977.60)	(\$10,977.60)	2016	10/20/2015	SS001130185	SS000860048	1	OTHER THAN SMALL BUSINESS
STATE OF NEVADA DEPARTMENT OF HUMAN RESOURCES	ELECTRONIC DEATH REGISTRATION-DEATH MATCH- NEV	(\$11,013.73)	(\$11,013.73)	2016	9/2/2016	SS001130321	SS000660134	1	OTHER THAN SMALL BUSINESS
DEPARTMENT OF HEALTH OHIO (4820)	IGF::OT::IGF OTHER FUNCTIONS	(\$11,056.55)	(\$11,056.55)	2016	10/21/2015	SS001330117	SS000860053	1	OTHER THAN SMALL BUSINESS
STATE OF NEW MEXICO (0565)	BIRTH RECORDS - STATE OF NEW MEXICO - CONTRACT Y	(\$11,065.53)	(\$11,065.53)	2016	10/20/2015	SS001030320	SS000860048	1	OTHER THAN SMALL BUSINESS
DEPARTMENT OF HEALTH UTAH (0545)	ELECTRONIC BIRTH REGISTRATION - UTAH	(\$11,108.87)	(\$11,108.87)	2015	9/25/2015	SS001230107	SS000860063	1	OTHER THAN SMALL BUSINESS

Sole Source Contracts  
(December 1, 2014 - December 1, 2016)

Vendor Name	Description of Requirement	Action Obligation	Base and All Options Value	Fiscal Year	Date Signed	PO/Delivery Order/Task Order/Call#	Parent Contract	Mod #	Contracting Officers Business Size Selection
ARNOLD, CHARLES O II	IGF::CL::IGF CLOSELY ASSOCIATED - DECREASE INDEPENDENT CASE REVIEWS AND FUNDING FOR REGIONAL MEDICAL CONTRACTOR SERVICES FOR REGION 8 FOR THE SOCIAL SECURITY ADMINISTRATION. REVIEWS BY MEDICAL CONSULTANT OF DISABILITY CLAIM CASE FILES FOR AGENCY DISABILITY PROGRAM. SPECIALTY - OPHTHALMOLOGIST								
HEALTH MENTAL HYGIENE MD DEPT	SPECIALTY - OPHTHALMOLOGIST	(\$11,250.00)	(\$11,250.00)	2016	8/30/2016	1	SS08164C003	3	SMALL BUSINESS
PUBLIC HEALTH IOWA DEPARTMENT OF	ELECTRONIC BIRTH REGISTRATION - MARYLAND	(\$11,336.44)	(\$11,336.44)	2015	12/2/2014	SS001230120	SS000860037	1	OTHER THAN SMALL BUSINESS
PUBLIC HEALTH IOWA DEPARTMENT OF	ELECTRONIC BIRTH REGISTRATION - IOWA.	(\$11,369.88)	(\$11,369.88)	2015	3/18/2015	SS001130157	SS000860032	1	OTHER THAN SMALL BUSINESS
UNITED STATES POSTAL SERVICE	BIRTH RECORDS - STATE OF IOWA - CONTRACT YEAR III.	(\$11,494.50)	(\$11,494.50)	2015	3/18/2015	SS001030296	SS000860032	1	OTHER THAN SMALL BUSINESS
HEALTH AND WELFARE IDAHO DEPARTMENT OF	THE PURPOSE OF THIS MODIFICATION IS CHANGE THE M	(\$11,520.00)	(\$11,520.00)	2016	4/27/2016	SS031650002		2	OTHER THAN SMALL BUSINESS
HEALTH AND HOSPITALS LOUISIANA DEPARTMENT OF	IGF::OT::IGF IDAHO EAB	(\$11,638.87)	(\$11,638.87)	2015	12/1/2014	SS001330661	SS000860029	1	OTHER THAN SMALL BUSINESS
NORTH CAROLINA STATE LABORATORY OF PUBLIC HEALTH	LOUISIANA EAB DELIVERY ORDER SS00-08-60035	(\$11,925.01)	(\$11,925.01)	2015	12/1/2014	SS001330662	SS000860035	1	OTHER THAN SMALL BUSINESS
PUBLIC HEALTH MASSACHUSETTS DEPT OF	IGF::OT::IGF OTHER FUNCTIONS DELIVERY ORDER FOR EAB CONTRACT SS00-08-60051 - NORTH CAROLINA	(\$11,980.23)	(\$11,980.23)	2015	8/14/2015	SS001330458	SS000860051	1	OTHER THAN SMALL BUSINESS
PRESTO, JOSEPH	BIRTH RECORDS - STATE OF MASSACHUSETTS	(\$12,018.12)	(\$12,018.12)	2015	12/2/2014	SS001130206	SS000860038	1	OTHER THAN SMALL BUSINESS
HEALTH WASHINGTON DEPARTMENT OF	IGF::CL::IGF REGION 2 MEDICAL CONSULTANTS. REVIEWS BY MEDICAL CONSULTANT OF DISABILITY CLAIM CASE FILES FOR AGENCY DISABILITY PROGRAM. MODIFICATION TO DEOBLIGATE EXCESS FUNDS.	(\$12,075.00)	(\$12,075.00)	2015	5/15/2015	4	SS021240002	3	SMALL BUSINESS
STATE OF SOUTH CAROLINA (0286)	BIRTH RECORDS - STATE OF WASHINGTON - CONTRACT Y	(\$12,101.22)	(\$12,101.22)	2016	10/5/2015	SS001030351	SS000860066	1	OTHER THAN SMALL BUSINESS
DEPARTMENT OF HEALTH UTAH (0545)	BIRTH RECORDS - STATE OF SOUTH CAROLINA - CONTRA	(\$12,167.58)	(\$12,167.58)	2015	1/26/2015	SS001030341	SS000860059	1	OTHER THAN SMALL BUSINESS
HUMAN SERVICES OREGON DEPARTMENT OF	ELECTRONIC BIRTH REGISTRATION - UTAH	(\$12,249.00)	(\$12,249.00)	2015	9/25/2015	SS001130222	SS000860063	1	OTHER THAN SMALL BUSINESS
STATE OF NEW MEXICO (0565)	ELECTRONIC BIRTH REGISTRATION - OREGON	(\$12,401.66)	(\$12,401.66)	2015	1/26/2015	SS001230190	SS000860055	1	OTHER THAN SMALL BUSINESS
DEPARTMENT OF HEALTH UTAH (0545)	ELECTRONIC BIRTH REGISTRATION - NEW MEXICO	(\$12,473.67)	(\$12,473.67)	2016	10/20/2015	SS001230105	SS000860048	1	OTHER THAN SMALL BUSINESS
STATE OF SOUTH CAROLINA (0286)	BIRTH RECORDS - STATE OF UTAH - CONTRACT YEAR III.	(\$12,636.84)	(\$12,636.84)	2015	9/21/2015	SS001030347	SS000860063	1	OTHER THAN SMALL BUSINESS
PUBLIC HEALTH AND ENVIRONMENT COLORADO DEPARTMENT OF	BIRTH RECORDS - STATE OF SOUTH CAROLINA - CONTRA	(\$12,706.77)	(\$12,706.77)	2015	1/26/2015	SS001130167	SS000860059	1	OTHER THAN SMALL BUSINESS
HERMAN MILLER, INC.	IGF::OT::IGF DELIVERY ORDER FOR EAB CONTRACT SS00-08-60022 - COLORADO	(\$12,828.61)	(\$12,828.61)	2015	1/29/2015	SS001330438	SS000860022	1	OTHER THAN SMALL BUSINESS
SEBA PROFESSIONAL SERVICES LLC	RIO PIEDRAS, PR A271 DESIGN, INSTALLATION, PRODUCT	(\$12,880.50)	(\$12,880.50)	2016	12/18/2015	SS001530068	SS001260003	2	OTHER THAN SMALL BUSINESS
HEALTH DEPARTMENT OKLAHOMA STATE (7987)	IGF::CL::IGF SEBA PROFESSIONAL SERVICES SS02-16-4C025 FORMAL PRESENTATIONS AND ORIENTATION CASE REVIEWS-TERMINATION FOR CONVENIENCE	(\$13,260.00)	(\$13,260.00)	2016	9/27/2016	3	SS02164C025	1	SMALL BUSINESS
PUBLIC HEALTH IOWA DEPARTMENT OF	ELECTRONIC BIRTH REGISTRATION - OKLAHOMA.	(\$13,745.94)	(\$13,745.94)	2015	8/26/2015	SS001130144	SS000860054	1	OTHER THAN SMALL BUSINESS
HUMAN SERVICES OREGON DEPARTMENT OF	IGF::OT::IGF OTHER FUNCTIONS DELIVERY ORDER FOR EAB CONTRACT SS00-08-60032 - IOWA	(\$13,980.70)	(\$13,980.70)	2015	3/18/2015	SS001330690	SS000860032	1	OTHER THAN SMALL BUSINESS
WELCH CONSULTING, LTD	BIRTH RECORDS - STATE OF OREGON - CONTRACT YEAR I	(\$14,052.69)	(\$14,052.69)	2015	1/26/2015	SS001130171	SS000860055	1	OTHER THAN SMALL BUSINESS
STATE OF WISCONSIN (6469)	IGF::CT::IGF - BILATERAL MODIFICATION TO ACKNOWLED	(\$16,305.00)	(\$14,485.00)	2016	8/17/2016	SS001461104		8	OTHER THAN SMALL BUSINESS
HEALTH AND HOSPITALS LOUISIANA DEPARTMENT OF	ELECTRONIC BIRTH REGISTRATION - WISCONSIN	(\$14,520.18)	(\$14,520.18)	2016	10/22/2015	SS001130228	SS000860068	1	OTHER THAN SMALL BUSINESS
HEALTH PENNSYLVANIA DEPARTMENT	BIRTH RECORDS - STATE OF LOUISIANA	(\$14,876.52)	(\$14,876.52)	2015	12/1/2014	SS001130203	SS000860035	1	OTHER THAN SMALL BUSINESS
SZ THERAPIES	IGF::OT::IGF OTHER FUNCTIONS ENUMERATION AT BIRTH - PENNSYLVANIA	(\$14,984.70)	(\$14,984.70)	2015	1/26/2015	SS001330120	SS000860056	1	OTHER THAN SMALL BUSINESS
HEALTH AND HOSPITALS LOUISIANA DEPARTMENT OF	IGF::CL::IGF CLOSELY ASSOCIATED - DECREASE ORIENT	(\$15,000.00)	(\$15,000.00)	2016	8/31/2016	2	SS08164C024	1	SMALL BUSINESS
HEALTH PENNSYLVANIA DEPARTMENT	IGF::CL::IGF ENUMERATION AT BIRTH DELIVERY ORDER LOUISIANA	(\$15,054.98)	(\$15,054.98)	2015	12/1/2014	SS001330086	SS000860035	1	OTHER THAN SMALL BUSINESS
HEALTH AND HUMAN SERVICES ARKANSAS DEPARTMENT OF (7358)	IGF::OT::IGF OTHER FUNCTIONS ENUMERATION AT BIRTH - PENNSYLVANIA	(\$15,147.85)	(\$15,147.85)	2015	1/26/2015	SS001330359	SS000860056	1	OTHER THAN SMALL BUSINESS
	ELECTRONIC BIRTH REGISTRATION - ARKANSAS.	(\$15,258.45)	(\$15,258.45)	2015	5/14/2015	SS001130188	SS000860020	1	OTHER THAN SMALL BUSINESS

Sole Source Contracts  
(December 1, 2014 - December 1, 2016)

Vendor Name	Description of Requirement	Action Obligation	Base and All Options Value	Fiscal Year	Date Signed	PO/Delivery Order/Task Order/Call#	Parent Contract	Mod #	Contracting Officers Business Size Selection
PUBLIC HEALTH MASSACHUSETTS DEPT OF	DCOSS-ELECTRONIC DEATH REGISTRATION (EDR) FOR TH	(\$15,436.98)	(\$15,436.98)	2016	8/26/2016	SS001130301	SS000660036	1	OTHER THAN SMALL BUSINESS
PUBLIC HEALTH AND ENVIRONMENT COLORADO DEPARTMENT OF	ELECTRONIC BIRTH REGISTRATION -COLORADO	(\$15,742.85)	(\$15,742.85)	2015	1/29/2015	SS001230185	SS000860022	1	OTHER THAN SMALL BUSINESS
HUMAN SERVICES OREGON DEPARTMENT OF	BIRTH RECORDS - STATE OF OREGON - CONTRACT YEAR I	(\$15,964.32)	(\$15,964.32)	2015	1/26/2015	SS001030335	SS000860055	1	OTHER THAN SMALL BUSINESS
STATE OF ALABAMA DEPARTMENT OF PUBLIC HEALTH	BIRTH RECORDS - STATE OF ALABAMA - CONTRACT YEAR	(\$16,004.61)	(\$16,004.61)	2015	4/16/2015	SS001030194	SS000860017	1	OTHER THAN SMALL BUSINESS
STATE OF WISCONSIN (6469)	BIRTH RECORDS - STATE OF WISCONSIN - CONTRACT YEA	(\$16,151.55)	(\$16,151.55)	2016	10/22/2015	SS001030354	SS000860068	1	OTHER THAN SMALL BUSINESS
HEALTH MENTAL HYGIENE MD DEPT	BIRTH RECORDS - STATE OF MARYLAND	(\$16,241.61)	(\$16,241.61)	2015	12/2/2014	SS001030305	SS000860037	1	OTHER THAN SMALL BUSINESS
MARVA P DAWKINS PHD	THIS IS TO DE-OBLIGATE INDEPENDENT CASE REVIEWS AGAINST SS05-16-4C009, CALL ORDER 2, DR MARVA DAWKINS IGF::CL::IGF	(\$16,331.96)	(\$16,331.96)	2016	8/22/2016		2 SS05164C009	1	SMALL BUSINESS
HEALTH AND ENVIRONMENT KANSAS DEPARTMENT OF	IGF::OT::IGF OTHER FUNCTIONS DELIVERY ORDER FOR EAB CONTRACT SS00-08-60033 - KANSAS	(\$16,337.59)	(\$16,337.59)	2015	3/20/2015	SS001330691	SS000860033	1	OTHER THAN SMALL BUSINESS
HERMAN MILLER, INC.	#J879 ROCK SPRINGS, WY - DESIGN, INSTALLATION AND	(\$16,513.52)	(\$16,513.52)	2015	4/21/2015	SS001431539	SS001260003	1	OTHER THAN SMALL BUSINESS
HEALTH WASHINGTON DEPARTMENT OF	IGF::OT::IGF OTHER FUNCTIONS WASHINGTON EAB DELIVERY ORDER SS00-08-60066	(\$16,540.90)	(\$16,540.90)	2016	10/5/2015	SS001330676	SS000860066	1	OTHER THAN SMALL BUSINESS
UNITED STATES POSTAL SERVICE	THE PURPOSE OF THIS MODIFICATION IS TO CHANGE TH	(\$16,640.00)	(\$16,640.00)	2016	7/12/2016	SS031650006		1	OTHER THAN SMALL BUSINESS
BERKOWITZ, MARK PSY D	IGF::CL::IGF CLOSELY ASSOCIATED - DE-OBLIGATE FUNC	(\$16,644.00)	(\$16,644.00)	2016	7/1/2016		1 SS08164C001	2	SMALL BUSINESS
HUMAN RESOURCES NEVADA DEPARTMENT OF	ELECTRONIC BIRTH REGISTRATION - NEVADA	(\$16,795.94)	(\$16,795.94)	2015	8/20/2015	SS001230102	SS000860045	1	OTHER THAN SMALL BUSINESS
HEALTH TENNESSEE DEPT OF	ELECTRONIC BIRTH REGISTRATION - TENNESSEE	(\$16,996.77)	(\$16,996.77)	2015	1/28/2015	SS001130224	SS000860061	1	OTHER THAN SMALL BUSINESS
STATE OF SOUTH CAROLINA (0286)	ELECTRONIC BIRTH REGISTRATION - SOUTH CAROLINA	(\$17,303.11)	(\$17,303.11)	2015	1/26/2015	SS001230127	SS000860059	1	OTHER THAN SMALL BUSINESS
HEALTH AND HOSPITALS LOUISIANA DEPARTMENT OF	IGF::CL::IGF ENUMERATION AT BIRTH DELIVERY ORDER LOUISIANA	(\$17,391.79)	(\$17,391.79)	2015	12/1/2014	SS001330372	SS000860035	1	OTHER THAN SMALL BUSINESS
PUBLIC HEALTH ILLINOIS DEPARTMENT OF (2628)	IGF::OT::IGF OTHER FUNCTIONS DELIVERY ORDER FOR EAB CONTRACT SS00-08-60030 - ILLINOIS	(\$17,585.06)	(\$17,585.06)	2015	3/20/2015	SS001330450	SS000860030	1	OTHER THAN SMALL BUSINESS
DIVISION OF VITAL RECORDS	BIRTH RECORDS - STATE OF VIRGINIA - CONTRACT YEAR I	(\$17,784.48)	(\$17,784.48)	2015	9/9/2015	SS001030349	SS000860065	1	OTHER THAN SMALL BUSINESS
MEDICAL AND HEALTH RESEARCH ASSOCIATION OF NEW YORK CITY INCORPORATED	BIRTH RECORDS - STATE OF NEW YORK CITY - CONTRACT	(\$18,081.96)	(\$18,081.96)	2016	10/20/2015	SS001130145	SS000860049	1	OTHER THAN SMALL BUSINESS
ALKA BISHNOI MD	IGF::CL::IGF REGION 2 MEDICAL CONSULTANTS. REVIEWS BY MEDICAL CONSULTANT OF DISABILITY CLAIM CASE FILES FOR AGENCY DISABILITY PROGRAM. MODIFICATION TO DECREASE QUANTITY AND PERIOD OF PERFORMANCE.	(\$18,094.50)	(\$18,094.50)	2015	12/12/2014		6 SS021140001	4	SMALL BUSINESS
HEALTH RESEARCH INCORPORATED	BIRTH RECORDS - STATE OF NEW YORK STATE	(\$18,145.11)	(\$18,145.11)	2015	1/22/2015	SS001130173	SS000860050	1	OTHER THAN SMALL BUSINESS
STATE OF WISCONSIN (6469)	ELECTRONIC BIRTH REGISTRATION - WISCONSIN	(\$18,317.86)	(\$18,317.86)	2016	10/22/2015	SS001230143	SS000860068	1	OTHER THAN SMALL BUSINESS
HERMAN MILLER, INC.	LOUISVILLE, KY MX80 DESIGN, INSTALLATION AND PROD	(\$18,762.35)	(\$18,762.35)	2016	11/16/2015	SS001431841	SS001260003	1	OTHER THAN SMALL BUSINESS
STATE OF ALABAMA DEPARTMENT OF PUBLIC HEALTH	ELECTRONIC BIRTH REGISTRATION - ALABAMA.	(\$18,840.80)	(\$18,840.80)	2015	4/16/2015	SS001130142	SS000860017	1	OTHER THAN SMALL BUSINESS
HEALTH MISSISSIPPI DEPARTMENT OF	BIRTH RECORDS - STATE OF MISSISSIPPI - CONTRACT YEA	(\$18,893.64)	(\$18,893.64)	2015	6/19/2015	SS001030311	SS000860041	1	OTHER THAN SMALL BUSINESS
HUMAN SERVICES OREGON DEPARTMENT OF	IGF::OT::IGF OTHER FUNCTIONS OREGON EAB DELIVERY ORDER S00-08-60055	(\$19,065.96)	(\$19,065.96)	2015	1/26/2015	SS001330668	SS000860055	1	OTHER THAN SMALL BUSINESS
KONIAG SERVICES INC	CONTRACT# SS00-09-60009 SECURITY OPERATIONS CENT	(\$19,407.96)	(\$19,407.96)	2016	10/7/2015		24 SS000960009	1	SMALL BUSINESS
PUBLIC HEALTH AND ENVIRONMENT COLORADO DEPARTMENT OF	BIRTH RECORDS - STATE OF COLORADO - CONTRACT YEA	(\$19,428.03)	(\$19,428.03)	2015	1/29/2015	SS001130189	SS000860022	1	OTHER THAN SMALL BUSINESS
OFFICE OF THE GOVERNOR	IGF::OT::IGF OTHER FUNCTIONS ENUMERATION AT BIRTH - PUERTO RICO	(\$19,700.99)	(\$19,700.99)	2015	1/26/2015	SS001330122	SS000860057	1	OTHER THAN SMALL BUSINESS
HERMAN MILLER, INC.	ST GEORGE, UT RA07 DESIGN, INSTALL, ESTIMATED PROI	(\$19,940.32)	(\$19,940.32)	2016	4/18/2016	SS001530355	SS001260003	2	OTHER THAN SMALL BUSINESS
STATE OF NEW MEXICO (0565)	IGF::OT::IGF OTHER FUNCTIONS NEW MEXICO ENUMERATION AT BIRTH DELIVERY ORDER S00-08-60048	(\$20,120.16)	(\$20,120.16)	2016	10/20/2015	SS001330672	SS000860048	1	OTHER THAN SMALL BUSINESS
OFFICE OF THE GOVERNOR	IGF::OT::IGF OTHER FUNCTIONS ENUMERATION AT BIRTH PUERTO RICO	(\$20,140.24)	(\$20,140.24)	2015	1/26/2015	SS001330360	SS000860057	1	OTHER THAN SMALL BUSINESS
PUBLIC HEALTH AND ENVIRONMENT COLORADO DEPARTMENT OF	IGF::OT::IGF OTHER FUNCTIONS ENUMERATION OF BIRTH UNITS - COLORADO	(\$20,280.80)	(\$20,280.80)	2015	1/29/2015	SS001330154	SS000860022	1	OTHER THAN SMALL BUSINESS
DEPARTMENT OF HEALTH UTAH (0545)	IGF::OT::IGF OTHER FUNCTIONS UTAH EAB DELIVERY ORDER S00-08-60063	(\$20,308.41)	(\$20,308.41)	2015	9/25/2015	SS001330674	SS000860063	1	OTHER THAN SMALL BUSINESS
KONIAG SERVICES INC	SECURITY OPERATIONS CENTER - IDS	(\$20,445.33)	(\$20,445.33)	2016	10/7/2015		29 SS000960009	1	SMALL BUSINESS
HERMAN MILLER, INC.	LAKEPORT, CA AA32 - DESIGN, INSTALLATION AND PROD	(\$20,825.20)	(\$20,825.20)	2015	6/30/2015	SS001431953	SS001260003	2	OTHER THAN SMALL BUSINESS

Sole Source Contracts  
(December 1, 2014 - December 1, 2016)

Vendor Name	Description of Requirement	Action Obligation	Base and All Options Value	Fiscal Year	Date Signed	PO/Delivery Order/Task Order/Call#	Parent Contract	Mod #	Contracting Officers Business Size Selection
HUMAN SERVICES OREGON DEPARTMENT OF	ELECTRONIC DEATH REGISTRATION-DEATH MATCH- ORE	(\$21,138.45)	(\$21,138.45)	2016	9/2/2016	SS001130288	SS000760047	1	OTHER THAN SMALL BUSINESS
HEALTH INDIANA DEPARTMENT OF	ELECTRONIC BIRTH REGISTRATION - INDIANA	(\$21,217.97)	(\$21,217.97)	2015	3/18/2015	SS001230182	SS000860031	1	OTHER THAN SMALL BUSINESS
PUBLIC HEALTH AND ENVIRONMENT COLORADO DEPARTMENT OF	BIRTH RECORDS - STATE OF COLORADO - CONTRACT YEA	(\$21,365.55)	(\$21,365.55)	2015	1/29/2015	SS001030237	SS000860022	1	OTHER THAN SMALL BUSINESS
MEDICAL AND HEALTH RESEARCH ASSOCIATION OF NEW YORK CITY INCORPORATED	ELECTRONIC DEATH REGISTRATION-DEATH MATCH- NEW	(\$21,507.62)	(\$21,507.62)	2016	8/26/2016	SS001130349	SS000660087	3	OTHER THAN SMALL BUSINESS
STATE OF SOUTH CAROLINA (0286)	IGF::OT::IGF OTHER FUNCTIONS DELIVERY ORDER FOR EAB CONTRACT SS00-08-60059 - SOUTH CAROLINA	(\$21,673.85)	(\$21,673.85)	2015	1/26/2015	SS001330703	SS000860059	1	OTHER THAN SMALL BUSINESS
KONIAG SERVICES INC	SOSS CONTRACT - SYSTEM OPERATIONS SUPPORT SERVICES IN SUPPORT OF DSSM. IGF::OT::IGF	(\$21,680.57)	(\$21,680.57)	2016	10/7/2015	32	SS000960009	1	SMALL BUSINESS
DIVISION OF VITAL RECORDS	ELECTRONIC BIRTH REGISTRATION - VIRGINIA	(\$21,757.41)	(\$21,757.41)	2015	9/9/2015	SS001130227	SS000860065	1	OTHER THAN SMALL BUSINESS
PUBLIC HEALTH MASSACHUSETTS DEPT OF	ELECTRONIC BIRTH REGISTRATION - MASSACHUSETTS	(\$21,932.44)	(\$21,932.44)	2015	12/2/2014	SS001230183	SS000860038	1	OTHER THAN SMALL BUSINESS
HEALTH INDIANA DEPARTMENT OF	BIRTH RECORDS - STATE OF COLORADO - CONTRACT YEA	(\$21,954.69)	(\$21,954.69)	2015	3/18/2015	SS001130197	SS000860031	1	OTHER THAN SMALL BUSINESS
HEALTH MISSISSIPPI DEPARTMENT OF	ELECTRONIC BIRTH REGISTRATION - MISSISSIPPI.	(\$21,999.21)	(\$21,999.21)	2015	6/18/2015	SS001130186	SS000860041	1	OTHER THAN SMALL BUSINESS
HEALTH, NORTH DAKOTA DEPARTMENT OF	IGF::OT::IGF OTHER FUNCTIONS ND EXERCISE OPTION YEAR 2 ENUMERATION AT BIRTH (EAB) THE CONTRACTOR SHALL PROVIDE BIRTH RECORDS FOR THE PURPOSE OF OBTAINING SOCIAL SECURITY NUMBER (SSN) AT BIRTH IN ACCORDANCE WITH THE ATTACHED STATEMENT OF WORK.	\$48,598.14	(\$22,224.43)	2016	4/18/2016	SS001461075		2	OTHER THAN SMALL BUSINESS
HEALTH RESEARCH INCORPORATED	ELECTRONIC BIRTH REGISTRATION - NEW YORK ST	(\$22,350.06)	(\$22,350.06)	2015	1/22/2015	SS001230137	SS000860050	1	OTHER THAN SMALL BUSINESS
HUMAN RESOURCES NEVADA DEPARTMENT OF	IGF::OT::IGF OTHER FUNCTIONS NEVADA EAB DELIVERY ORDER S00-08-60045	(\$22,416.81)	(\$22,416.81)	2015	8/25/2015	SS001330671	SS000860045	1	OTHER THAN SMALL BUSINESS
HEALTH AND HUMAN SERVICES ARKANSAS DEPARTMENT OF (7358)	IGF::OT::IGF OTHER FUNCTIONS ARKANSAS EAB DELIVERY ORDER S00-08-60020	(\$22,434.38)	(\$22,434.38)	2015	5/14/2015	SS001330650	SS000860020	1	OTHER THAN SMALL BUSINESS
STATE OF ALABAMA DEPARTMENT OF PUBLIC HEALTH	ELECTRONIC BIRTH REGISTRATION - ALABAMA.	(\$22,452.80)	(\$22,452.80)	2015	4/16/2015	SS001230188	SS000860017	1	OTHER THAN SMALL BUSINESS
KONIAG SERVICES INC	OTHER FUNCTION- SUPPORT FOR DITM WIRELESS TEAM IGF::OT::IGF	(\$22,538.85)	(\$22,538.85)	2016	10/28/2015	33	SS000960009	1	SMALL BUSINESS
PATEL, SHITAL	IGF::CL::IGF THE PURPOSE OF THIS MODIFICATION IS TO DE-OBLIGATE FUNDING FOR INDEPENDENT CASE REVIEWS UNDER THE SUBJECT CALL ORDER.	(\$23,100.00)	(\$23,100.00)	2016	8/24/2016	2	SS03154C002	1	SMALL BUSINESS
BALTIMORE SOUND ENGINEERING, INC.	IGF::OT::IGF OTHER FUNCTION  EXERCISE OPTION YEAR II AND CHANGES TO SECTIONS A 3, B-1.3, D-1 AND D-2 OF THE STATEMENT OF WORK  PA SYSTEM WARRANTY AND REPAIR CONTRACT	\$15,509.00	(\$23,263.96)	2015	8/11/2015	SS001360029		2	SMALL BUSINESS
COMMUNITY HEALTH MICHIGAN DEPARTMENT OF	ELECTRONIC BIRTH REGISTRATION - MICHIGAN.	(\$23,368.38)	(\$23,368.38)	2015	5/14/2015	SS001130166	SS000860039	1	OTHER THAN SMALL BUSINESS
HEALTH INDIANA DEPARTMENT OF	BIRTH RECORDS - STATE OF INDIANA	(\$23,382.42)	(\$23,382.42)	2015	3/18/2015	SS001030295	SS000860031	1	OTHER THAN SMALL BUSINESS
CARL BANCOFF MD	IGF::CL::IGF- THE PURPOSE OF THIS MODIFICATION IS TO	(\$23,550.00)	(\$23,550.00)	2016	7/17/2016	2	SS03154C022	1	SMALL BUSINESS
PUBLIC HEALTH ILLINOIS DEPARTMENT OF (2628)	IGF::OT::IGF OTHER FUNCTIONS DELIVERY ORDER FOR EAB CONTRACT SS00-08-60030 - ILLINOIS	(\$23,747.11)	(\$23,747.11)	2015	2/18/2015	SS001330168	SS000860030	1	OTHER THAN SMALL BUSINESS
HEALTH AND FAMILY SERVCIES KENTUCKY CABINET FOR	ELECTRONIC BIRTH REGISTRATION - KENTUCKY.	(\$24,110.46)	(\$24,110.46)	2015	3/19/2015	SS001130159	SS000860034	1	OTHER THAN SMALL BUSINESS
MEDICAL AND HEALTH RESEARCH ASSOCIATION OF NEW YORK CITY INCORPORATED	ELECTRONIC BIRTH REGISTRATION - NY CITY	(\$24,119.41)	(\$24,119.41)	2016	10/20/2015	SS001230132	SS000860049	1	OTHER THAN SMALL BUSINESS
DALTON, CHARLES B	IGF::CL::IGF REGION 2 MEDICAL CONSULTANTS. REVIEWS BY MEDICAL CONSULTANT OF DISABILITY CLAIM CASE FILES FOR AGENCY DISABILITY PROGRAM. MODIFICATION TO INCREASE QUANTITY, EXTEND PERFORMANCE.	(\$24,126.00)	(\$24,126.00)	2015	8/20/2015	13	SS021040025	2	SMALL BUSINESS



Sole Source Contracts  
(December 1, 2014 - December 1, 2016)

Vendor Name	Description of Requirement	Action Obligation	Base and All Options Value	Fiscal Year	Date Signed	PO/Delivery Order/Task Order/Call#	Parent Contract	Mod #	Contracting Officers Business Size Selection
WYOMING, DEPARTMENT OF HEALTH	IGF::OT::IGF OTHER FUNCTIONS WY EXERCISE OPTION YEAR 2 ENUMERATION AT BIRTH (EAB) THE CONTRACTOR SHALL PROVIDE BIRTH RECORDS FOR THE PURPOSE OF OBTAINING SOCIAL SECURITY NUMBER (SSN) AT BIRTH IN ACCORDANCE WITH THE ATTACHED STATEMENT OF WORK.	\$26,574.47	(\$24,650.65)	2016	5/2/2016	SS001461085		2	OTHER THAN SMALL BUSINESS
HEALTH DEPARTMENT OKLAHOMA STATE (7987)	IGF::OT::IGF OTHER FUNCTIONS OKLAHOMA EAB DELIVERY ORDER S00-08-60054	(\$24,675.81)	(\$24,675.81)	2015	9/8/2015	SS001330664	SS000860054	1	OTHER THAN SMALL BUSINESS
NORTH CAROLINA STATE LABORATORY OF PUBLIC HEALTH	ELECTRONIC BIRTH REGISTRATION - NORTH CAROLINA.	(\$25,151.07)	(\$25,151.07)	2015	8/13/2015	SS001130184	SS000860051	1	OTHER THAN SMALL BUSINESS
HEALTH MISSISSIPPI DEPARTMENT OF	ELECTRONIC BIRTH REGISTRATION - MISSISSIPPI	(\$25,485.90)	(\$25,485.90)	2015	6/18/2015	SS001230078	SS000860041	1	OTHER THAN SMALL BUSINESS
HEALTH AND HUMAN SERVICES, MAINE DEPARTMENT OF	ELECTRONIC DEATH REGISTRATION - MAINE. THE PURPO	\$0.00	(\$25,830.00)	2015	12/2/2014	SS001260043		4	OTHER THAN SMALL BUSINESS
STATE OF ALABAMA DEPARTMENT OF PUBLIC HEALTH	IGF::OT::IGF OTHER FUNCTIONS ELECTRONIC BIRTH REGISTRATION - ALABAMA	(\$25,918.26)	(\$25,918.26)	2015	4/16/2015	SS001330678	SS000860017	1	OTHER THAN SMALL BUSINESS
HEALTH, VERMONT DEPARTMENT OF	IGF::OT::IGF OTHER FUNCTIONS VT EXERCISE OPTION YEAR 2 ENUMERATION AT BIRTH (EAB) THE CONTRACTOR SHALL PROVIDE BIRTH RECORDS FOR THE PURPOSE OF OBTAINING SOCIAL SECURITY NUMBER (SSN) AT BIRTH IN ACCORDANCE WITH THE ATTACHED STATEMENT OF WORK.	\$21,759.43	(\$26,143.50)	2016	4/20/2016	SS001461088		2	OTHER THAN SMALL BUSINESS
STATE OF WISCONSIN (6469)	IGF::OT::IGF OTHER FUNCTIONS DELIVERY ORDER FOR EAB CONTRACT	(\$26,779.19)	(\$26,779.19)	2016	10/21/2015	SS001330708	SS000860068	1	OTHER THAN SMALL BUSINESS
KONIAG SERVICES INC	CONTRACTOR SUPPORT FOR THE WINDOWS 7 CONVERS	(\$27,204.57)	(\$27,204.57)	2016	10/7/2015		26 SS000960009	1	SMALL BUSINESS
HEALTH TENNESSEE DEPT OF	BIRTH RECORDS - STATE OF TENNESSEE - CONTRACT YEA	(\$27,207.60)	(\$27,207.60)	2015	1/28/2015	SS001030343	SS000860061	1	OTHER THAN SMALL BUSINESS
HEALTH MENTAL HYGIENE MD DEPT	IGF::OT::IGF ENUMERATION AT BIRTH MARYLAND	(\$27,218.44)	(\$27,218.44)	2015	12/2/2014	SS001330723	SS000860037	1	OTHER THAN SMALL BUSINESS
PUBLIC HEALTH AND ENVIRONMENT COLORADO DEPARTMENT OF	IGF::OT::IGF OTHER FUNCTIONS COLORADO EAB DELIVERY ORDER SS00-08-60022	(\$27,670.24)	(\$27,670.24)	2015	1/29/2015	SS001330658	SS000860022	1	OTHER THAN SMALL BUSINESS
HEALTH MISSISSIPPI DEPARTMENT OF	IGF::OT::IGF OTHER FUNCTIONS DELIVERY ORDER FOR EAB CONTRACT SS00-08-60041 - MISSISSIPPI	(\$27,695.34)	(\$27,695.34)	2015	6/18/2015	SS001330700	SS000860041	1	OTHER THAN SMALL BUSINESS
COMMUNITY HEALTH MICHIGAN DEPARTMENT OF	ELECTRONIC BIRTH REGISTRATION - MICHIGAN	(\$27,907.62)	(\$27,907.62)	2015	5/14/2015	SS001230131	SS000860039	1	OTHER THAN SMALL BUSINESS
HEALTH AND ENVIRONMENT, KANSAS DEPARTMENT OF	DCOSS-ELECTRONIC DEATH REGISTRATION (EDR) FOR TH	(\$27,927.01)	(\$27,927.01)	2016	9/26/2016	SS001130291	SS000960020	1	OTHER THAN SMALL BUSINESS
KONIAG SERVICES INC	CONTRACT CLOSEOUT	(\$28,072.12)	(\$28,072.12)	2015	5/13/2015		4 SS000960009	3	SMALL BUSINESS
HEALTH TENNESSEE DEPT OF	ELECTRONIC BIRTH REGISTRATION - TENNESSEE	(\$28,144.62)	(\$28,144.62)	2015	1/28/2015	SS001230128	SS000860061	1	OTHER THAN SMALL BUSINESS
STATE HEALTH SERVICES TEXAS DEPARTMENT OF	IGF::OT::IGF DELIVERY ORDER FOR EAB CONTRACT SS00-08-60062 - TEXAS	(\$28,179.77)	(\$28,179.77)	2015	1/28/2015	SS001330425	SS000860062	1	OTHER THAN SMALL BUSINESS
KONIAG SERVICES INC	CONTRACT CLOSEOUT	(\$28,361.44)	(\$28,361.44)	2015	5/13/2015		11 SS000960009	1	SMALL BUSINESS
HEALTH PENNSYLVANIA DEPARTMENT	BIRTH RECORDS - STATE OF PENNSYLVANIA - CONTRACT	(\$28,518.21)	(\$28,518.21)	2015	1/26/2015	SS001030338	SS000860056	1	OTHER THAN SMALL BUSINESS
DIVISION OF VITAL RECORDS	ELECTRONIC BIRTH REGISTRATION - VIRGINIA	(\$28,647.01)	(\$28,647.01)	2015	9/9/2015	SS001230129	SS000860065	1	OTHER THAN SMALL BUSINESS
LOCUM, INC.	IGF::CL::IGF MODIFICATION TO DEDUCT FUNDS FROM THE CALL ORDER. DR. GERBING KEY PERSONNEL WAS UNABLE TO ATTEND ORIENTATION.	(\$29,360.00)	(\$29,360.00)	2016	5/3/2016		3 SS01164C030	1	SMALL BUSINESS
COMMUNITY HEALTH MICHIGAN DEPARTMENT OF	BIRTH RECORDS - STATE OF MICHIGAN- CONTRACT YEAR	(\$29,385.63)	(\$29,385.63)	2015	5/14/2015	SS001030308	SS000860039	1	OTHER THAN SMALL BUSINESS
PUBLIC HEALTH ILLINOIS DEPARTMENT OF (2628)	ELECTRONIC BIRTH REGISTRATION - ILLINOIS	(\$29,638.98)	(\$29,638.98)	2015	2/18/2015	SS001230139	SS000860030	1	OTHER THAN SMALL BUSINESS
STATE HEALTH SERVICES TEXAS DEPARTMENT OF	IGF::OT::IGF OTHER FUNCTIONS ENUMERATION OF BIRTH UNITS - TEXAS	(\$29,926.73)	(\$29,926.73)	2015	1/28/2015	SS001330163	SS000860062	1	OTHER THAN SMALL BUSINESS
LOCUM, INC.	REGIONAL MEDICAL CONTRACTOR SERVICES FOR REGION 10 IGF::CL::IGF CLOSELY ASSOCIATED	(\$29,983.34)	(\$29,983.34)	2016	9/15/2016		5 SS10164C002	1	SMALL BUSINESS

Sole Source Contracts  
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Vendor Name	Description of Requirement	Action Obligation	Base and All Options Value	Fiscal Year	Date Signed	PO/Delivery Order/Task Order/Call#	Parent Contract	Mod #	Contracting Officers Business Size Selection
HEALTH AND SOCIAL SERVICES, ALASKA DEPARTMENT OF	IGF::OT::IGF OTHER FUNCTIONS AK EXERCISE OPTION YEAR 2 ENUMERATION AT BIRTH (EAB) THE CONTRACTOR SHALL PROVIDE BIRTH RECORDS FOR THE PURPOSE OF OBTAINING SOCIAL SECURITY NUMBER (SSN) AT BIRTH IN ACCORDANCE WITH THE ATTACHED STATEMENT OF WORK.	\$41,992.14	(\$30,452.53)	2016	4/11/2016	SS001461048		2	OTHER THAN SMALL BUSINESS
HEALTH AND FAMILY SERVCIES KENTUCKY CABINET FOR	ELECTRONIC BIRTH REGISTRATION - KENTUCKY	(\$30,516.21)	(\$30,516.21)	2015	3/19/2015	SS001230138	SS000860034	1	OTHER THAN SMALL BUSINESS
HERMAN MILLER, INC.	CASA GRANDE, AZ #R903 - DESIGN, INSTALLATION AND P	(\$31,355.90)	(\$31,355.90)	2016	3/1/2016	SS001530416	SS001260003	1	OTHER THAN SMALL BUSINESS
HEALTH RESEARCH INCORPORATED	BIRTH RECORDS - STATE OF NEW YORK - CONTRACT YEAR	(\$31,473.60)	(\$31,473.60)	2015	1/22/2015	SS001030322	SS000860050	1	OTHER THAN SMALL BUSINESS
HEALTH INDIANA DEPARTMENT OF	IGF::OT::IGF OTHER FUNCTIONS	(\$31,754.01)	(\$31,754.01)	2015	3/18/2015	SS001330688	SS000860031	1	OTHER THAN SMALL BUSINESS
SCHNIEWIND JR MD, HENRY	IGF::CL::IGF MODIFICATION TO DEDUCT 400 INDEPENDENT DISABILITY CASE REVIEWS.	(\$32,056.00)	(\$32,056.00)	2016	6/9/2016		SS01164C031	1	SMALL BUSINESS
PUBLIC HEALTH MASSACHUSETTS DEPT OF	IGF::OT::IGF ENUMERATION AT BIRTH MASSACHUSETTS	(\$32,717.85)	(\$32,717.85)	2015	12/2/2014	SS001330718	SS000860038	1	OTHER THAN SMALL BUSINESS
PUBLIC HEALTH MASSACHUSETTS DEPT OF	BIRTH RECORDS - STATE OF MASSACHUSETTES	(\$33,146.82)	(\$33,146.82)	2015	12/2/2014	SS001030316	SS000860038	1	OTHER THAN SMALL BUSINESS
KONIAG SERVICES INC	CONTRACTOR SUPPORT FOR WINDOWS 7 CONVERSION	(\$33,529.15)	(\$33,529.15)	2016	10/7/2015		SS000960009	1	SMALL BUSINESS
HEALTH AND FAMILY SERVCIES KENTUCKY CABINET FOR	IGF::OT::IGF OTHER FUNCTIONS DELIVERY ORDER FOR EAB CONTRACT SS00-08-60034 - KENTUCKY	(\$33,538.62)	(\$33,538.62)	2015	3/19/2015	SS001330692	SS000860034	1	OTHER THAN SMALL BUSINESS
BRENNER, ANNE MANON MD	IGF::CL::IGF CLOSELY ASSOCIATED - DECREASE EXAMIN	(\$34,200.00)	(\$34,200.00)	2016	8/29/2016		SS08164C002	3	SMALL BUSINESS
HERMAN MILLER, INC.	BLUEFIELD WV #G311 DESIGN, INSTALLATION SERVICES	(\$34,207.05)	(\$34,207.05)	2016	7/27/2016	SS001530737	SS001260003	1	OTHER THAN SMALL BUSINESS
HERMAN MILLER, INC.	BOGALUSA, LA SYSTEMS FURNITURE N/A PRIOR TO 03/01/2012	(\$34,884.79)	(\$34,884.79)	2015	12/16/2014	SS001330956	SS001260003	2	OTHER THAN SMALL BUSINESS
SOUTH DAKOTA, STATE OF	IGF::OT::IGF OTHER FUNCTIONS SD EXERCISE OPTION YEAR 2 ENUMERATION AT BIRTH (EAB) THE CONTRACTOR SHALL PROVIDE BIRTH RECORDS FOR THE PURPOSE OF OBTAINING SOCIAL SECURITY NUMBER (SSN) AT BIRTH IN ACCORDANCE WITH THE ATTACHED STATEMENT OF WORK.	\$49,185.34	(\$34,935.24)	2016	4/19/2016	SS001461079		3	OTHER THAN SMALL BUSINESS
DEPARTMENT OF HEALTH OHIO (4820)	ELECTRONIC BIRTH REGISTRATION - OHIO.	(\$35,211.69)	(\$35,211.69)	2016	10/20/2015	SS001130147	SS000860053	1	OTHER THAN SMALL BUSINESS
PUBLIC HEALTH ILLINOIS DEPARTMENT OF (2628)	BIRTH RECORDS - STATE OF ILLINOIS - CONTRACT YEAR IV	(\$35,513.82)	(\$35,513.82)	2015	2/18/2015	SS001130195	SS000860030	1	OTHER THAN SMALL BUSINESS
HEALTH SERVICES ARIZONA DEPT OF	ELECTRONIC DEATH REGISTRATION-DEATH MATCH-ARIZ	(\$35,965.14)	(\$35,965.14)	2016	8/30/2016	SS001130343	SS000760107	3	OTHER THAN SMALL BUSINESS
NORTH CAROLINA STATE LABORATORY OF PUBLIC HEALTH	BIRTH RECORDS - STATE OF NORTH CAROLINA	(\$36,521.70)	(\$36,521.70)	2015	8/13/2015	SS001030330	SS000860051	1	OTHER THAN SMALL BUSINESS
HEALTH AND HOSPITALS LOUISIANA DEPARTMENT OF	BIRTH RECORDS - STATE OF LOUISIANA	(\$36,640.20)	(\$36,640.20)	2015	12/1/2014	SS001030300	SS000860035	1	OTHER THAN SMALL BUSINESS
DEPARTMENT OF HEALTH OHIO (4820)	BIRTH RECORDS - STATE OF OHIO - CONTRACT YEAR III.	(\$37,246.92)	(\$37,246.92)	2016	10/21/2015	SS001030333	SS000860053	1	OTHER THAN SMALL BUSINESS
OFFICE OF THE GOVERNOR	BIRTH RECORDS - PUERTO RICO - CONTRACT YEAR III.	(\$38,363.19)	(\$38,363.19)	2015	1/26/2015	SS001030339	SS000860057	1	OTHER THAN SMALL BUSINESS
HERMAN MILLER, INC.	JACKSONVILLE, FL #IX41 DESIGN, INSTALLATION AND PRO	(\$38,496.65)	(\$38,496.65)	2015	6/29/2015	SS001431604	SS001260003	1	OTHER THAN SMALL BUSINESS
HERMAN MILLER, INC.	JACKSONVILLE, FL IX41 PRODUCT AND INSTALLATION FO	(\$38,965.06)	(\$38,965.06)	2016	7/27/2016	SS001530759	SS001260003	2	OTHER THAN SMALL BUSINESS
COMMUNITY HEALTH MICHIGAN DEPARTMENT OF	IGF::OT::IGF OTHER FUNCTIONS DELIVERY ORDER FOR EAB CONTRACT SS00-08-60039 - MICHIGAN	(\$39,118.35)	(\$39,118.35)	2015	5/15/2015	SS001330696	SS000860039	1	OTHER THAN SMALL BUSINESS
HEALTH PENNSYLVANIA DEPARTMENT	ELECTRONIC BIRTH REGISTRATION - PENNSYLVANIA	(\$39,154.26)	(\$39,154.26)	2015	1/26/2015	SS001130143	SS000860056	1	OTHER THAN SMALL BUSINESS
MOGUL, ROBERT	INDEPENDENT CASE REVIEWS. THE PURPOSE OF THIS MO	(\$39,760.00)	(\$39,760.00)	2016	8/24/2016		SS03154C019	1	SMALL BUSINESS
HEALTH, HAWAII DEPARTMENT OF	IGF::OT::IGF OTHER FUNCTIONS HI EXERCISE OPTION YEAR 2 ENUMERATION AT BIRTH (EAB) THE CONTRACTOR SHALL PROVIDE BIRTH RECORDS FOR THE PURPOSE OF OBTAINING SOCIAL SECURITY NUMBER (SSN) AT BIRTH IN ACCORDANCE WITH THE ATTACHED STATEMENT OF WORK.	\$73,308.25	(\$40,599.30)	2016	4/11/2016	SS001461059		2	OTHER THAN SMALL BUSINESS
NUANCE COMMUNICATIONS, INC.	NUANCE PURCHASE FOR DMA EXERCISING OPTION YEAR	\$40,800.00	(\$40,800.00)	2016	2/8/2016	SS001350078		3	SMALL BUSINESS



Sole Source Contracts  
(December 1, 2014 - December 1, 2016)

Vendor Name	Description of Requirement	Action Obligation	Base and All Options Value	Fiscal Year	Date Signed	PO/Delivery Order/Task Order/Call#	Parent Contract	Mod #	Contracting Officers Business Size Selection
GEORGIA, DEPARTMENT OF PUBLIC HEALTH	ELECTRONIC DEATH REGISTRATION GEORGIA THE PURPOSE OF MODIFICATION NUMBER 5 IS TO EXERCISE OPTION YEAR IV TO EXTEND THE TERM OF THE CONTRACT FROM JANUARY 1, 2016 THROUGH DECEMBER 31, 2016 FOR RECEIPT OF ELECTRONIC DEATH RECORDS.	\$0.00	(\$41,051.50)	2016	12/3/2015	SS001260021			5 OTHER THAN SMALL BUSINESS
DEPARTMENT OF HEALTH OHIO (4820)	ELECTRONIC BIRTH REGISTRATION - OHIO	(\$41,072.80)	(\$41,072.80)	2016	10/21/2015	SS001230135	SS000860053	1	OTHER THAN SMALL BUSINESS
HEALTH RESEARCH INCORPORATED	IGF::OT::IGF OTHER FUNCTIONS ENUMERATION AT BIRTH NEW YORK	(\$41,327.15)	(\$41,327.15)	2015	1/23/2015	SS001330725	SS000860050	1	OTHER THAN SMALL BUSINESS
KONIAG SERVICES INC	CONTRACT CLOSEOUT	(\$41,964.94)	(\$41,964.94)	2015	5/13/2015		SS000960009	1	SMALL BUSINESS
NORTH CAROLINA STATE LABORATORY OF PUBLIC HEALTH	ELECTRONIC BIRTH REGISTRATION - NORTH CAROLINA	(\$42,206.42)	(\$42,206.42)	2015	8/13/2015	SS001230133	SS000860051	1	OTHER THAN SMALL BUSINESS
DISTRICT OF COLUMBIA, GOVERNMENT OF	IGF::OT::IGF OTHER FUNCTIONS DC EXERCISE OPTION YEAR 2 ENUMERATION AT BIRTH (EAB) THE CONTRACTOR SHALL PROVIDE BIRTH RECORDS FOR THE PURPOSE OF OBTAINING SOCIAL SECURITY NUMBER (SSN) AT BIRTH IN ACCORDANCE WITH THE ATTACHED STATEMENT OF WORK.	\$55,347.27	(\$42,570.48)	2016	4/11/2016	SS001461057		2	OTHER THAN SMALL BUSINESS
HEALTH AND HOSPITALS, LOUISIANA DEPARTMENT OF	IGF::OT::IGF OTHER FUNCTIONS LA EXERCISE OPTION YEAR 2 ENUMERATION AT BIRTH (EAB) THE CONTRACTOR SHALL PROVIDE BIRTH RECORDS FOR THE PURPOSE OF OBTAINING SOCIAL SECURITY NUMBER (SSN) AT BIRTH IN ACCORDANCE WITH THE ATTACHED STATEMENT OF WORK.	\$254,217.23	(\$43,331.39)	2016	4/13/2016	SS001461047		2	OTHER THAN SMALL BUSINESS
PUBLIC HEALTH AND HUMAN SERVICES, MONTANA DEPARTMENT OF	IGF::OT::IGF OTHER FUNCTIONS MT EXERCISE OPTION YEAR 2 ENUMERATION AT BIRTH (EAB) THE CONTRACTOR SHALL PROVIDE BIRTH RECORDS FOR THE PURPOSE OF OBTAINING SOCIAL SECURITY NUMBER (SSN) AT BIRTH IN ACCORDANCE WITH THE ATTACHED STATEMENT OF WORK.	\$46,234.66	(\$43,967.11)	2016	5/2/2016	SS001461070		2	OTHER THAN SMALL BUSINESS
HEALTH TENNESSEE DEPT OF	IGF::OT::IGF OTHER FUNCTIONS DELIVERY ORDER FOR EAB CONTRACT SS00-08-60061 - TENNESSEE	(\$44,558.54)	(\$44,558.54)	2015	1/28/2015	SS001330706	SS000860061	1	OTHER THAN SMALL BUSINESS
KONIAG SERVICES INC	MAINFRAME TAPE STORAGE MANAGEMENT PROGRAMN	(\$44,796.99)	(\$44,796.99)	2015	9/1/2015		SS000960009	4	SMALL BUSINESS
TERRY, KIMBERLEE R	IGF::CL::IGF CLOSELY ASSOCIATED - DE-OBLIGATE INDE	(\$45,600.00)	(\$45,600.00)	2016	8/25/2016		SS08164C025	2	SMALL BUSINESS
HAMERSMA PHD, RICHARD	REGION V MEDICAL CONSULTANT SERVICES FOR THE SOCIAL SECURITY ADMINISTRATION. REVIEWS BY MEDICAL CONSULTANT OF DISABILITY CLAIM CASE FILES FOR AGENCY DISABILITY PROGRAM. DE-OBLIGATE FUNDING FOR 500 INDEPENDENT CASE REVIEWS. IGF::CL::IGF	(\$45,620.00)	(\$45,620.00)	2016	8/22/2016		SS05164C012	1	SMALL BUSINESS
MEDICAL AND HEALTH RESEARCH ASSOCIATION OF NEW YORK CITY INCORPORATED	IGF::OT::IGF OTHER FUNCTIONS ENUMERATION AT BIRTH FOR NEW YORK CITY	(\$45,664.43)	(\$45,664.43)	2016	10/20/2015	SS001330710	SS000860049	1	OTHER THAN SMALL BUSINESS
HEALTH AND HUMAN SERVICES, MAINE DEPARTMENT OF	IGF::OT::IGF OTHER FUNCTIONS ME EXERCISE OPTION YEAR 2 ENUMERATION AT BIRTH (EAB) THE CONTRACTOR SHALL PROVIDE BIRTH RECORDS FOR THE PURPOSE OF OBTAINING SOCIAL SECURITY NUMBER (SSN) AT BIRTH IN ACCORDANCE WITH THE ATTACHED STATEMENT OF WORK.	\$49,805.57	(\$46,280.05)	2016	5/2/2016	SS001461086		2	OTHER THAN SMALL BUSINESS
DIVISION OF VITAL RECORDS	IGF::OT::IGF OTHER FUNCTIONS ENUMERATION AT BIRTH VIRGINIA	(\$46,394.84)	(\$46,394.84)	2015	9/9/2015	SS001330699	SS000860065	2	OTHER THAN SMALL BUSINESS
HERMAN MILLER, INC.	J169 SADDLEBROOK (TSC), NJ - DESIGN, INSTALLATION A	(\$47,854.02)	(\$47,854.02)	2016	3/1/2016	SS001530321	SS001260003	1	OTHER THAN SMALL BUSINESS
HEALTH PENNSYLVANIA DEPARTMENT	ELECTRONIC BIRTH REGISTRATION - PENNSYLVANIA	(\$48,097.17)	(\$48,097.17)	2015	1/26/2015	SS001230136	SS000860056	1	OTHER THAN SMALL BUSINESS

Sole Source Contracts  
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Vendor Name	Description of Requirement	Action Obligation	Base and All Options Value	Fiscal Year	Date Signed	PO/Delivery Order/Task Order/Call#	Parent Contract	Mod #	Contracting Officers Business Size Selection
CHOPRA, MD, ARVIND OFFICE OF THE GOVERNOR	IGF::CL::IGF REGION 2 MEDICAL CONSULTANTS. REVIEWS BY MEDICAL CONSULTANT OF DISABILITY CLAIM CASE FILES FOR AGENCY DISABILITY PROGRAM. MODIFICATION TO DECREASE QUANTITY AND SHORTEN PERFORMANCE.	(\$48,252.00)	(\$48,252.00)	2015	12/12/2014	8	SS021040027	3	SMALL BUSINESS
	ELECTRONIC BIRTH REGISTRATION - PUERTO RICO	(\$48,438.00)	(\$48,438.00)	2015	1/26/2015	SS001130237	SS000860057	1	OTHER THAN SMALL BUSINESS
HEALTH, RHODE ISLAND DEPARTMENT OF	IGF::OT::IGF OTHER FUNCTIONS RI EXERCISE OPTION YEAR 2 ENUMERATION AT BIRTH (EAB) THE CONTRACTOR SHALL PROVIDE BIRTH RECORDS FOR THE PURPOSE OF OBTAINING SOCIAL SECURITY NUMBER (SSN) AT BIRTH IN ACCORDANCE WITH THE ATTACHED STATEMENT OF WORK.	\$44,311.58	(\$49,857.46)	2016	4/19/2016	SS001461090		2	OTHER THAN SMALL BUSINESS
JOAN TRACHTENBERG MD	IGF::CL::IGF REGION 2 MEDICAL CONSULTANTS. REVIEWS BY MEDICAL CONSULTANT OF DISABILITY CLAIM CASE FILES FOR AGENCY DISABILITY PROGRAM. MODIFICATION TO DEOBLIGATE EXCESS FUNDS.	(\$51,147.12)	(\$51,147.12)	2015	5/15/2015	7	SS021140108	3	SMALL BUSINESS
EXECUTIVE OFFICE OF THE GOVERNOR OF DELAWARE	IGF::OT::IGF OTHER FUNCTIONS DE EXERCISE OPTION YEAR 2 ENUMERATION AT BIRTH (EAB) THE CONTRACTOR SHALL PROVIDE BIRTH RECORDS FOR THE PURPOSE OF OBTAINING SOCIAL SECURITY NUMBER (SSN) AT BIRTH IN ACCORDANCE WITH THE ATTACHED STATEMENT OF WORK.	\$43,775.76	(\$51,490.61)	2016	5/2/2016	SS001461055		2	OTHER THAN SMALL BUSINESS
SECRETARY STATE, NEW HAMPSHIRE DEPT OF	IGF::OT::IGF OTHER FUNCTIONS NH EXERCISE OPTION YEAR 2 ENUMERATION AT BIRTH (EAB) THE CONTRACTOR SHALL PROVIDE BIRTH RECORDS FOR THE PURPOSE OF OBTAINING SOCIAL SECURITY NUMBER (SSN) AT BIRTH IN ACCORDANCE WITH THE ATTACHED STATEMENT OF WORK.	\$47,930.20	(\$52,019.93)	2016	5/2/2016	SS001461097		2	OTHER THAN SMALL BUSINESS
DEPARTMENT OF HEALTH OHIO (4820)	IGF::OT::IGF OTHER FUNCTIONS ENUMERATION AT BIRTH FOR OHIO	(\$54,901.23)	(\$54,901.23)	2016	10/21/2015	SS001330709	SS000860053	1	OTHER THAN SMALL BUSINESS
HEALTH PENNSYLVANIA DEPARTMENT	IGF::OT::IGF OTHER FUNCTIONS ENUMERATION AT BIRTH PENNSYLVANIA	(\$58,969.94)	(\$58,969.94)	2015	1/26/2015	SS001330720	SS000860056	1	OTHER THAN SMALL BUSINESS
NORTH CAROLINA STATE LABORATORY OF PUBLIC HEALTH HERMAN MILLER, INC.	IGF::OT::IGF OTHER FUNCTIONS DELIVERY ORDER FOR EAB CONTRACT SS00-08-60051 - NORTH CAROLINA	(\$59,878.56)	(\$59,878.56)	2015	8/20/2015	SS001330701	SS000860051	1	OTHER THAN SMALL BUSINESS
	LAS VEGAS, NV (ODAR) SX71 DESIGN, PRODUCT AND REL	(\$60,603.64)	(\$60,603.64)	2015	8/26/2015	SS001530196	SS001260003	1	OTHER THAN SMALL BUSINESS
PUBLIC HEALTH AND ENVIRONMENT, COLORADO DEPARTMENT OF	ELECTRONIC DEATH REGISTRATION - COLORADO THE PURPOSE OF MODIFICATION NUMBER 4 IS TO EXERCISE OPTION YEAR THREE TO EXTEND THE TERM OF THE CONTRACT FROM JANUARY 1, 2015 THROUGH DECEMBER 31, 2015 FOR RECEIPT OF DEATH RECORDS.	\$0.00	(\$60,885.00)	2015	12/16/2014	SS001260016		4	OTHER THAN SMALL BUSINESS
HEALTH AND HUMAN RESOURCES, WEST VIRGINIA DEPARTMENT OF KONIAG SERVICES INC	IGF::OT::IGF OTHER FUNCTIONS WV EXERCISE OPTION YEAR 2 ENUMERATION AT BIRTH (EAB) THE CONTRACTOR SHALL PROVIDE BIRTH RECORDS FOR THE PURPOSE OF OBTAINING SOCIAL SECURITY NUMBER (SSN) AT BIRTH IN ACCORDANCE WITH THE ATTACHED STATEMENT OF WORK.	\$79,396.78	(\$61,700.65)	2016	5/4/2016	SS001461083		2	OTHER THAN SMALL BUSINESS
	CONTRACT CLOSEOUT	(\$62,202.92)	(\$62,202.92)	2015	5/20/2015	17	SS000960009	2	SMALL BUSINESS
KONIAG SERVICES INC	OTHER FUNCTION-SS00-09-60009-SINGLE POINT OF FAILURE IN SUPPORT OF DOSDO.  IGF::OT::IGF	(\$62,310.90)	(\$62,310.90)	2016	12/9/2015	34	SS000960009	1	SMALL BUSINESS

Sole Source Contracts  
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Vendor Name	Description of Requirement	Action Obligation	Base and All Options Value	Fiscal Year	Date Signed	PO/Delivery Order/Task Order/Call#	Parent Contract	Mod #	Contracting Officers Business Size Selection
CA DHS VITAL RECORDS	ELECTRONIC DEATH REGISTRATION-DEATH MATCH-CALI	(\$62,344.99)	(\$62,344.99)	2016	9/9/2016	SS001130344	SS000660059	3	OTHER THAN SMALL BUSINESS
HERMAN MILLER, INC.	SAN JUAN, PR #AE04 SYSTEMS FURNITURE DESIGN, INST	(\$64,165.50)	(\$64,165.50)	2016	11/16/2015	SS001432040	SS001260003	3	OTHER THAN SMALL BUSINESS
	IGF::OT::IGF OTHER FUNCTIONS								
PUBLIC HEALTH ILLINOIS DEPARTMENT OF (2628)	DELIVERY ORDER FOR EAB CONTRACT SS00-08-60030 - ILLINOIS	(\$64,230.90)	(\$64,230.90)	2015	3/20/2015	SS001330687	SS000860030	1	OTHER THAN SMALL BUSINESS
WELCH CONSULTING, LTD	IGF::CT::IGF - EXPERT WITNESS SERVICES TO PROVIDE AS	\$60,015.00	(\$64,590.00)	2016	6/6/2016	SS001461104		7	OTHER THAN SMALL BUSINESS
	MEDICAL CONTRACTOR SERVICES - PHYSICAL CASES CLOSELY ASSOCIATED TO INHERENTLY GOVERNMENTAL FUNCTION								
KNOTT MD, HURLEY W	IGF::CL::IGF FOR CLOSELY ASSOCIATED	(\$69,544.48)	(\$69,544.48)	2015	4/27/2015		11 SS041140028	2	SMALL BUSINESS
CALDWELL MD, LARRY V	IGF::CL::IGF DE-OBLIGATE FUNDS AND TERMINATE BPA -	(\$70,306.20)	(\$70,306.20)	2016	5/24/2016		1 SS04164C035	1	SMALL BUSINESS
STATE HEALTH SERVICES TEXAS DEPARTMENT OF	ELECTRONIC BIRTH REGISTRATION - TEXAS	(\$71,730.43)	(\$71,730.43)	2015	1/28/2015	SS001230184	SS000860062	1	OTHER THAN SMALL BUSINESS
STATE HEALTH SERVICES TEXAS DEPARTMENT OF	BIRTH RECORDS - STATE OF TEXAS - CONTRACT YEAR III.	(\$71,962.68)	(\$71,962.68)	2015	1/28/2015	SS001030344	SS000860062	1	OTHER THAN SMALL BUSINESS
HERMAN MILLER, INC.	OAKLAND, CA ODAR - DESIGN, INSTALLATION AND ESTIM	(\$73,034.52)	(\$73,034.52)	2015	5/12/2015	SS001431103	SS001260003	1	OTHER THAN SMALL BUSINESS
	IGF::CL::IGF								
OSVALDO FULCO	REGION 2 MEDICAL CONSULTANTS. REVIEWS BY MEDICAL CONSULTANT OF DISABILITY CLAIM CASE FILES FOR AGENCY DISABILITY PROGRAM.	(\$73,458.00)	(\$73,458.00)	2015	8/20/2015		15 SS021140082	1	SMALL BUSINESS
	IGF::OT::IGF OTHER FUNCTIONS								
HEALTH AND WELFARE, IDAHO DEPARTMENT OF	ID EXERCISE OPTION YEAR 2 ENUMERATION AT BIRTH (EAB) THE CONTRACTOR SHALL PROVIDE BIRTH RECORDS FOR THE PURPOSE OF OBTAINING SOCIAL SECURITY NUMBER (SSN) AT BIRTH IN ACCORDANCE WITH THE ATTACHED STATEMENT OF WORK.	\$83,096.14	(\$76,866.81)	2016	4/11/2016	SS001461060		2	OTHER THAN SMALL BUSINESS
OFFICE OF THE GOVERNOR	ELECTRONIC BIRTH REGISTRATION - PUERTO RICO	(\$78,070.84)	(\$78,070.84)	2015	1/26/2015	SS001230192	SS000860057	1	OTHER THAN SMALL BUSINESS
HERMAN MILLER, INC.	LONG ISLAND - CENTRAL ISLIP, NY ODAR SX70 DESIGN, IN	(\$79,374.55)	(\$79,374.55)	2015	3/19/2015	SS001431655	SS001260003	1	OTHER THAN SMALL BUSINESS
STATE HEALTH SERVICES TEXAS DEPARTMENT OF	BIRTH RECORDS - STATE OF TEXAS - CONTRACT YEAR IV.	(\$81,516.54)	(\$81,516.54)	2015	1/28/2015	SS001130163	SS000860062	1	OTHER THAN SMALL BUSINESS
	IGF::CL::IGF CLOSELY ASSOCIATED								
MELEZ, KATHLEEN ANNE	SS01-16-4C001 CALL ORDER 0001- MELEZ, KATHLEEN - TERMINATION FOR DEFAULT	(\$84,000.00)	(\$84,000.00)	2016	7/26/2016		1 SS01164C001	1	SMALL BUSINESS
	IGF::OT::IGF OTHER FUNCTIONS								
HEALTH AND HUMAN SERVICES, NEBRASKA DEPARTMENT OF	NE EXERCISE OPTION YEAR 2 ENUMERATION AT BIRTH (EAB) THE CONTRACTOR SHALL PROVIDE BIRTH RECORDS FOR THE PURPOSE OF OBTAINING SOCIAL SECURITY NUMBER (SSN) AT BIRTH IN ACCORDANCE WITH THE ATTACHED STATEMENT OF WORK.	\$102,370.98	(\$84,122.77)	2016	4/13/2016	SS001461098		2	OTHER THAN SMALL BUSINESS
KONIAG SERVICES INC	SS00-09-60009 SUPPORT SERVICES FOR DLM	(\$85,268.38)	(\$85,268.38)	2015	9/2/2015		22 SS000960009	2	SMALL BUSINESS
KONIAG SERVICES INC	CONTRACT CLOSEOUT	(\$90,446.76)	(\$90,446.76)	2015	5/20/2015		15 SS000960009	4	SMALL BUSINESS
	IGF::OT::IGF OTHER FUNCTIONS								
STATE HEALTH SERVICES TEXAS DEPARTMENT OF	TEXAS EAB DELIVERY ORDER S00-08-60062	(\$95,209.32)	(\$95,209.32)	2015	1/28/2015	SS001330673	SS000860062	1	OTHER THAN SMALL BUSINESS
HERMAN MILLER, INC.	ROCKINGHAM, NC C342 SYSTEMS FURNITURE - THIS TAS	(\$95,734.35)	(\$95,734.35)	2016	7/12/2016	SS001630347	SS001260003	1	OTHER THAN SMALL BUSINESS
	IGF::OT::IGF OTHER FUNCTIONS								
HEALTH AND ENVIRONMENT, KANSAS DEPARTMENT OF	KS	\$158,944.03	(\$96,447.14)	2016	5/16/2016	SS001461064		2	OTHER THAN SMALL BUSINESS
	IGF::OT::IGF OTHER FUNCTIONS								
HEALTH, NEW MEXICO DEPARTMENT OF	NM EXERCISE OPTION YEAR 2 ENUMERATION AT BIRTH (EAB) THE CONTRACTOR SHALL PROVIDE BIRTH RECORDS FOR THE PURPOSE OF OBTAINING SOCIAL SECURITY NUMBER (SSN) AT BIRTH IN ACCORDANCE WITH THE ATTACHED STATEMENT OF WORK.	\$98,286.27	(\$96,622.79)	2016	5/16/2016	SS001461073		2	OTHER THAN SMALL BUSINESS
	IGF::OT::IGF OTHER FUNCTIONS								
PUBLIC HEALTH, IOWA DEPARTMENT OF	IA EXERCISE OPTION YEAR 2 ENUMERATION AT BIRTH (EAB) THE CONTRACTOR SHALL PROVIDE BIRTH RECORDS FOR THE PURPOSE OF OBTAINING SOCIAL SECURITY NUMBER (SSN) AT BIRTH IN ACCORDANCE WITH THE ATTACHED STATEMENT OF WORK.	\$149,174.49	(\$99,854.93)	2016	4/12/2016	SS001461063		2	OTHER THAN SMALL BUSINESS

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(December 1, 2014 - December 1, 2016)

Vendor Name	Description of Requirement	Action Obligation	Base and All Options Value	Fiscal Year	Date Signed	PO/Delivery Order/Task Order/Call#	Parent Contract	Mod #	Contracting Officers Business Size Selection
ARKANSAS DEPARTMENT OF HEALTH	IGF::OT::IGF OTHER FUNCTIONS AR EXERCISE OPTION YEAR 2 ENUMERATION AT BIRTH (EAB) THE CONTRACTOR SHALL PROVIDE BIRTH RECORDS FOR THE PURPOSE OF OBTAINING SOCIAL SECURITY NUMBER (SSN) AT BIRTH IN ACCORDANCE WITH THE ATTACHED STATEMENT OF WORK.	\$149,031.36	(\$100,295.33)	2016	4/11/2016	SS001461050		2	OTHER THAN SMALL BUSINESS
WELCH CONSULTING, LTD	IGF::CT::IGF - EXPERT WITNESS SERVICES TO PROVIDE AS	\$0.00	(\$100,605.00)	2015	6/9/2015	SS001461104		2	OTHER THAN SMALL BUSINESS
HERMAN MILLER, INC.	STILLWATER, OK (RB46) - SERVICES (DESIGN, INSTALLATI	(\$101,022.08)	(\$101,022.08)	2016	7/29/2016	SS001530631	SS001260003	1	OTHER THAN SMALL BUSINESS
HERMAN MILLER, INC.	FALMOUTH, MA #VB88 - DESIGN PRODUCT ESTIMATE AN	(\$101,184.40)	(\$101,184.40)	2015	7/9/2015	SS001431097	SS001260003	2	OTHER THAN SMALL BUSINESS
PUBLIC HEALTH ILLINOIS DEPARTMENT OF (2628)	BIRTH RECORDS - STATE OF ILLINOIS - CONTRACT YEAR II	(\$106,808.79)	(\$106,808.79)	2015	2/18/2015	SS001030294	SS000860030	1	OTHER THAN SMALL BUSINESS
OFFICE OF THE GOVERNOR	IGF::OT::IGF OTHER FUNCTIONS ENUMERATION AT BIRTH PUERTO RICO	(\$108,833.60)	(\$108,833.60)	2015	1/26/2015	SS001330712	SS000860057	1	OTHER THAN SMALL BUSINESS
KONIAG SERVICES INC	SS00-09-60009 ELIMINATE SINGLE POINTS OF FAILURE IN	(\$110,776.18)	(\$110,776.18)	2015	9/2/2015		23 SS000960009	1	SMALL BUSINESS
PUBLIC HEALTH, MASSACHUSETTS DEPT OF	ELECTRONIC DEATH REGISTRATION - MASSACHUSETTS.	\$0.00	(\$112,545.00)	2015	12/11/2014	SS001260053		4	OTHER THAN SMALL BUSINESS
KONIAG SERVICES INC	CONTRACT CLOSEOUT	(\$116,305.18)	(\$116,305.18)	2015	5/20/2015		16 SS000960009	3	SMALL BUSINESS
KONIAG SERVICES INC	SECURITY OPERATIONS CENTER - REMEDIATION	(\$123,260.01)	(\$123,260.01)	2016	10/7/2015		28 SS000960009	1	SMALL BUSINESS
HEALTH AND HUMAN SERVICES, NEVADA DEPARTMENT OF	IGF::OT::IGF OTHER FUNCTIONS NV EXERCISE OPTION YEAR 2 ENUMERATION AT BIRTH (EAB) THE CONTRACTOR SHALL PROVIDE BIRTH RECORDS FOR THE PURPOSE OF OBTAINING SOCIAL SECURITY NUMBER (SSN) AT BIRTH IN ACCORDANCE WITH THE ATTACHED STATEMENT OF WORK.	\$130,905.23	(\$129,272.01)	2016	4/13/2016	SS001461072		2	OTHER THAN SMALL BUSINESS
HEALTHCARE SERVICES, CALIFORNIA DEPARTMENT OF	N/A PRIOR 03/01/2012 INVESTIGATIVE SERVICES	(\$130,102.12)	(\$130,102.12)	2015	9/16/2015	SS090862002		5	OTHER THAN SMALL BUSINESS
HERMAN MILLER, INC.	BALTIMORE, MD DO #R020 CHANGE IN SYSTEMS FURNIT	(\$132,598.45)	(\$132,598.45)	2016	1/8/2016	SS001530078	SS001260003	1	OTHER THAN SMALL BUSINESS
KONIAG SERVICES INC	CONTRACT CLOSEOUT	(\$134,929.97)	(\$134,929.97)	2015	8/13/2015		19 SS000960009	1	SMALL BUSINESS
HUMAN SERVICES, OREGON DEPARTMENT OF	IGF::OT::IGF OTHER FUNCTIONS OR EXERCISE OPTION YEAR 2 ENUMERATION AT BIRTH (EAB) THE CONTRACTOR SHALL PROVIDE BIRTH RECORDS FOR THE PURPOSE OF OBTAINING SOCIAL SECURITY NUMBER (SSN) AT BIRTH IN ACCORDANCE WITH THE ATTACHED STATEMENT OF WORK.	\$171,638.56	(\$137,079.00)	2016	4/19/2016	SS001461077		2	OTHER THAN SMALL BUSINESS
HEALTH, WASHINGTON STATE DEPARTMENT OF	IGF::OT::IGF OTHER FUNCTIONS WA EXERCISE OPTION YEAR 2 ENUMERATION AT BIRTH (EAB) THE CONTRACTOR SHALL PROVIDE BIRTH RECORDS FOR THE PURPOSE OF OBTAINING SOCIAL SECURITY NUMBER (SSN) AT BIRTH IN ACCORDANCE WITH THE ATTACHED STATEMENT OF WORK.	\$334,887.50	(\$140,883.00)	2016	5/16/2016	SS001461082		2	OTHER THAN SMALL BUSINESS
PUBLIC HEALTH, CONNECTICUT DEPARTMENT OF	IGF::OT::IGF OTHER FUNCTIONS CT EXERCISE OPTION YEAR 2 ENUMERATION AT BIRTH (EAB) THE CONTRACTOR SHALL PROVIDE BIRTH RECORDS FOR THE PURPOSE OF OBTAINING SOCIAL SECURITY NUMBER (SSN) AT BIRTH IN ACCORDANCE WITH THE ATTACHED STATEMENT OF WORK.	\$144,219.99	(\$141,518.41)	2016	4/11/2016	SS001461054		2	OTHER THAN SMALL BUSINESS
DEPARTMENT OF HEALTH UTAH	IGF::OT::IGF OTHER FUNCTIONS UT EXERCISE OPTION YEAR 2 ENUMERATION AT BIRTH (EAB) THE CONTRACTOR SHALL PROVIDE BIRTH RECORDS FOR THE PURPOSE OF OBTAINING SOCIAL SECURITY NUMBER (SSN) AT BIRTH IN ACCORDANCE WITH THE ATTACHED STATEMENT OF WORK.	\$195,688.07	(\$142,970.60)	2016	4/20/2016	SS001461081		2	OTHER THAN SMALL BUSINESS
KONIAG SERVICES INC	CONTINUE CONTRACTOR SERVICES ON CONTRACT SS00-	(\$143,737.78)	(\$143,737.78)	2015	9/1/2015		21 SS000960009	2	SMALL BUSINESS

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Vendor Name	Description of Requirement	Action Obligation	Base and All Options Value	Fiscal Year	Date Signed	PO/Delivery Order/Task Order/Call#	Parent Contract	Mod #	Contracting Officers Business Size Selection
HEALTH DEPARTMENT, OKLAHOMA STATE	IGF::OT::IGF OTHER FUNCTIONS OK EXERCISE OPTION YEAR 2 ENUMERATION AT BIRTH (EAB) THE CONTRACTOR SHALL PROVIDE BIRTH RECORDS FOR THE PURPOSE OF OBTAINING SOCIAL SECURITY NUMBER (SSN) AT BIRTH IN ACCORDANCE WITH THE ATTACHED STATEMENT OF WORK.	\$185,511.16	(\$147,618.85)	2016	4/18/2016	SS001461076		2	OTHER THAN SMALL BUSINESS
HEALTH & HUMAN SERVICES, NORTH CAROLINA DEPARTMENT OF	ELECTRONIC DEATH REGISTRATION - NORTH CAROLINA THE PURPOSE OF MODIFICATION NUMBER 4 IS TO EXERCISE OPTION YEAR THREE TO EXTEND THE TERM OF THE CONTRACT FROM JANUARY 1, 2015 THROUGH DECEMBER 31, 2015 FOR RECEIPT OF DEATH RECORDS.	\$0.00	(\$153,135.00)	2015	12/30/2014	SS001260049		4	OTHER THAN SMALL BUSINESS
HEALTH & HUMAN SERVICES, NORTH CAROLINA DEPARTMENT OF	ELECTRONIC DEATH REGISTRATION NORTH CAROLINA THE PURPOSE OF MODIFICATION NUMBER 4 IS TO EXERCISE OPTION YEAR IV TO EXTEND THE TERM OF THE CONTRACT FROM JANUARY 1, 2016 THROUGH DECEMBER 31, 2016 FOR RECEIPT OF ELECTRONIC DEATH RECORDS.	\$0.00	(\$157,285.00)	2016	12/9/2015	SS001260049		6	OTHER THAN SMALL BUSINESS
HERMAN MILLER, INC.	SAN LUIS OBISPO, CA C986 - DESIGN,INSTALLATION AND	(\$158,166.54)	(\$158,166.54)	2016	7/20/2016	SS001530547	SS001260003	1	OTHER THAN SMALL BUSINESS
HEALTH, MISSISSIPPI STATE DEPARTMENT OF	IGF::OT::IGF OTHER FUNCTIONS MS EXERCISE OPTION YEAR 2 ENUMERATION AT BIRTH (EAB) THE CONTRACTOR SHALL PROVIDE BIRTH RECORDS FOR THE PURPOSE OF OBTAINING SOCIAL SECURITY NUMBER (SSN) AT BIRTH IN ACCORDANCE WITH THE ATTACHED STATEMENT OF WORK.	\$144,873.25	(\$166,009.96)	2016	4/13/2016	SS001461069		2	OTHER THAN SMALL BUSINESS
HEALTH MENTAL HYGIENE MD DEPT	IGF::OT::IGF OTHER FUNCTIONS MD EXERCISE OPTION YEAR 2 ENUMERATION AT BIRTH (EAB) THE CONTRACTOR SHALL PROVIDE BIRTH RECORDS FOR THE PURPOSE OF OBTAINING SOCIAL SECURITY NUMBER (SSN) AT BIRTH IN ACCORDANCE WITH THE ATTACHED STATEMENT OF WORK.	\$270,225.77	(\$166,558.65)	2016	4/13/2016	SS001461067		3	OTHER THAN SMALL BUSINESS
HEALTH AND ENVIRONMENTAL CONTROL, SOUTH CAROLINA DEPARTMENT OF	IGF::OT::IGF OTHER FUNCTIONS SC EXERCISE OPTION YEAR 2 ENUMERATION AT BIRTH (EAB) THE CONTRACTOR SHALL PROVIDE BIRTH RECORDS FOR THE PURPOSE OF OBTAINING SOCIAL SECURITY NUMBER (SSN) AT BIRTH IN ACCORDANCE WITH THE ATTACHED STATEMENT OF WORK.	\$204,411.66	(\$169,262.09)	2016	5/16/2016	SS001461078		2	OTHER THAN SMALL BUSINESS
HEALTH SERVICES, WISCONSIN DEPARTMENT OF	IGF::OT::IGF OTHER FUNCTIONS WI EXERCISE OPTION YEAR 2 ENUMERATION AT BIRTH (EAB) THE CONTRACTOR SHALL PROVIDE BIRTH RECORDS FOR THE PURPOSE OF OBTAINING SOCIAL SECURITY NUMBER (SSN) AT BIRTH IN ACCORDANCE WITH THE ATTACHED STATEMENT OF WORK.	\$250,719.72	(\$186,506.33)	2016	4/20/2016	SS001461084		2	OTHER THAN SMALL BUSINESS
PUBLIC HEALTH, ALABAMA DEPARTMENT OF	IGF::OT::IGF OTHER FUNCTIONS AL EXERCISE OPTION YEAR 2 ENUMERATION AT BIRTH (EAB) THE CONTRACTOR SHALL PROVIDE BIRTH RECORDS FOR THE PURPOSE OF OBTAINING SOCIAL SECURITY NUMBER (SSN) AT BIRTH IN ACCORDANCE WITH THE ATTACHED STATEMENT OF WORK.	\$218,746.68	(\$191,627.52)	2016	4/11/2016	SS001461036		2	OTHER THAN SMALL BUSINESS

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Vendor Name	Description of Requirement	Action Obligation	Base and All Options Value	Fiscal Year	Date Signed	PO/Delivery Order/Task Order/Call#	Parent Contract	Mod #	Contracting Officers Business Size Selection
PUBLIC HEALTH AND ENVIRONMENT, COLORADO DEPARTMENT OF	IGF::OT::IGF OTHER FUNCTIONS CO EXERCISE OPTION YEAR 2 ENUMERATION AT BIRTH (EAB) THE CONTRACTOR SHALL PROVIDE BIRTH RECORDS FOR THE PURPOSE OF OBTAINING SOCIAL SECURITY NUMBER (SSN) AT BIRTH IN ACCORDANCE WITH THE ATTACHED STATEMENT OF WORK.	\$252,470.31	(\$194,401.26)	2016	4/11/2016	SS001461053		2	OTHER THAN SMALL BUSINESS
HEALTH & HUMAN SERVICES, NORTH CAROLINA DEPARTMENT OF	IGF::OT::IGF OTHER FUNCTIONS NC EXERCISE OPTION YEAR 2 ENUMERATION AT BIRTH (EAB) THE CONTRACTOR SHALL PROVIDE BIRTH RECORDS FOR THE PURPOSE OF OBTAINING SOCIAL SECURITY NUMBER (SSN) AT BIRTH IN ACCORDANCE WITH THE ATTACHED STATEMENT OF WORK.	\$516,211.19	(\$195,339.64)	2016	4/18/2016	SS001461074		2	OTHER THAN SMALL BUSINESS
HEALTH RESEARCH, INC.	ELECTRONIC DEATH REGISTRATION - NEW YORK STATE.	\$0.00	(\$195,570.00)	2015	12/15/2014	SS001260051		4	OTHER THAN SMALL BUSINESS
HEALTH AND SENIOR SERVICES NEW JERSEY DEPARTMENT OF	ELECTRONIC DEATH REGISTRATION-DEATH MATCH- NEW	(\$195,934.79)	(\$195,934.79)	2016	8/26/2016	SS001130345	SS000660065	3	OTHER THAN SMALL BUSINESS
INTEGRITY NATIONAL CORPORATION	CONTRACT CLOSEOUT	(\$198,218.87)	(\$198,218.87)	2015	12/16/2014	SS000860076		22	SMALL BUSINESS
DEPARTMENT OF HEALTH MINNESOTA	IGF::OT::IGF OTHER FUNCTIONS MN EXERCISE OPTION YEAR 2 ENUMERATION AT BIRTH (EAB) THE CONTRACTOR SHALL PROVIDE BIRTH RECORDS FOR THE PURPOSE OF OBTAINING SOCIAL SECURITY NUMBER (SSN) AT BIRTH IN ACCORDANCE WITH THE ATTACHED STATEMENT OF WORK.	\$259,351.56	(\$199,830.87)	2016	4/13/2016	SS001461068		2	OTHER THAN SMALL BUSINESS
HEALTH RESEARCH, INC.	ELECTRONIC DEATH REGISTRATION HEALTH RESEARCH INC. ON BEHALF OF THE STATE OF NEW YORK. THE PURPOSE OF MODIFICATION NUMBER 5 IS TO EXERCISE OPTION YEAR IV TO EXTEND THE TERM OF THE CONTRACT FROM JANUARY 1, 2016 THROUGH DECEMBER 31, 2016 FOR RECEIPT OF ELECTRONIC DEATH RECORDS.	\$0.00	(\$200,870.00)	2016	12/3/2015	SS001260051		5	OTHER THAN SMALL BUSINESS
HEALTH, FLORIDA DEPARTMENT OF	ELECTRONIC DEATH REGISTRATION-DEATH MATCH-FLOR	(\$204,622.09)	(\$204,622.09)	2016	9/2/2016	SS001130335	SS000860123	3	OTHER THAN SMALL BUSINESS
HEALTH, TENNESSEE DEPT OF	IGF::OT::IGF OTHER FUNCTIONS TN EXERCISE OPTION YEAR 2 ENUMERATION AT BIRTH (EAB) THE CONTRACTOR SHALL PROVIDE BIRTH RECORDS FOR THE PURPOSE OF OBTAINING SOCIAL SECURITY NUMBER (SSN) AT BIRTH IN ACCORDANCE WITH THE ATTACHED STATEMENT OF WORK.	\$330,255.96	(\$208,043.61)	2016	4/19/2016	SS001461080		3	OTHER THAN SMALL BUSINESS
CHFS-DEPARTMENT FOR COMMUNITY BASED SERVICES	IGF::OT::IGF OTHER FUNCTIONS KY EXERCISE OPTION YEAR 2 ENUMERATION AT BIRTH (EAB) THE CONTRACTOR SHALL PROVIDE BIRTH RECORDS FOR THE PURPOSE OF OBTAINING SOCIAL SECURITY NUMBER (SSN) AT BIRTH IN ACCORDANCE WITH THE ATTACHED STATEMENT OF WORK.	\$199,603.96	(\$210,466.86)	2016	4/12/2016	SS001461065		3	OTHER THAN SMALL BUSINESS
HERMAN MILLER, INC.	PANAMA CITY, FL #R668 - DESIGN SERVICES, INSTALLATI	(\$213,045.18)	(\$213,045.18)	2015	5/20/2015	SS001431078	SS001260003	2	OTHER THAN SMALL BUSINESS
PUBLIC HEALTH, MASSACHUSETTS DEPT OF	IGF::OT::IGF OTHER FUNCTIONS MA EXERCISE OPTION YEAR 2 ENUMERATION AT BIRTH (EAB) THE CONTRACTOR SHALL PROVIDE BIRTH RECORDS FOR THE PURPOSE OF OBTAINING SOCIAL SECURITY NUMBER (SSN) AT BIRTH IN ACCORDANCE WITH THE ATTACHED STATEMENT OF WORK.	\$275,202.29	(\$217,561.05)	2016	4/13/2016	SS001461071		2	OTHER THAN SMALL BUSINESS

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Vendor Name	Description of Requirement	Action Obligation	Base and All Options Value	Fiscal Year	Date Signed	PO/Delivery Order/Task Order/Call#	Parent Contract	Mod #	Contracting Officers Business Size Selection
HEALTH AND SENIOR SERVICES, MISSOURI DEPARTMENT OF	IGF::OT::IGF OTHER FUNCTIONS MO EXERCISE OPTION YEAR 2 ENUMERATION AT BIRTH (EAB) THE CONTRACTOR SHALL PROVIDE BIRTH RECORDS FOR THE PURPOSE OF OBTAINING SOCIAL SECURITY NUMBER (SSN) AT BIRTH IN ACCORDANCE WITH THE ATTACHED STATEMENT OF WORK.	\$291,882.44	(\$219,502.09)	2016	5/17/2016	SS001461094		2	OTHER THAN SMALL BUSINESS
INDIANA STATE DEPARTMENT OF HEALTH	IGF::OT::IGF OTHER FUNCTIONS IN EXERCISE OPTION YEAR 2 ENUMERATION AT BIRTH (EAB) THE CONTRACTOR SHALL PROVIDE BIRTH RECORDS FOR THE PURPOSE OF OBTAINING SOCIAL SECURITY NUMBER (SSN) AT BIRTH IN ACCORDANCE WITH THE ATTACHED STATEMENT OF WORK.	\$318,585.36	(\$236,187.87)	2016	4/12/2016	SS001461062		2	OTHER THAN SMALL BUSINESS
HEALTH, VIRGINIA DEPARTMENT OF	IGF::OT::IGF OTHER FUNCTIONS VA EXERCISE OPTION YEAR 2 ENUMERATION AT BIRTH (EAB) THE CONTRACTOR SHALL PROVIDE BIRTH RECORDS FOR THE PURPOSE OF OBTAINING SOCIAL SECURITY NUMBER (SSN) AT BIRTH IN ACCORDANCE WITH THE ATTACHED STATEMENT OF WORK.	\$389,908.14	(\$237,438.83)	2016	5/17/2016	SS001461087		2	OTHER THAN SMALL BUSINESS
KONIAG SERVICES INC	CONTRACTOR SUPPORT SOSS KSI SS00-09-60009 IN SUPP	(\$260,710.53)	(\$260,710.53)	2016	10/7/2015		31 SS000960009	1	SMALL BUSINESS
HEALTH RESEARCH, INC.	IGF::OT::IGF OTHER FUNCTION NY EXERCISE OPTION YEAR 2 ENUMERATION AT BIRTH (EAB) THE CONTRACTOR SHALL PROVIDE BIRTH RECORDS FOR THE PURPOSE OF OBTAINING SOCIAL SECURITY NUMBER (SSN) AT BIRTH IN ACCORDANCE WITH THE ATTACHED STATEMENT OF WORK.	\$460,016.15	(\$261,334.36)	2016	4/18/2016	SS001461093		2	OTHER THAN SMALL BUSINESS
COMMUNITY HEALTH, MICHIGAN DEPARTMENT OF	IGF::OT::IGF OTHER FUNCTIONS MI EXERCISE OPTION YEAR 2 ENUMERATION AT BIRTH (EAB) THE CONTRACTOR SHALL PROVIDE BIRTH RECORDS FOR THE PURPOSE OF OBTAINING SOCIAL SECURITY NUMBER (SSN) AT BIRTH IN ACCORDANCE WITH THE ATTACHED STATEMENT OF WORK.	\$425,609.90	(\$287,151.52)	2016	5/19/2016	SS001461066		2	OTHER THAN SMALL BUSINESS
ASSOCIATION INTERNATIONALE DE LA SECURITE SOCIALE (AISS)	SOCIAL SECURITY PROGRAMS THROUGHOUT THE WORLD	(\$290,713.00)	(\$290,713.00)	2016	7/15/2016	SS000960108		9	OTHER THAN SMALL BUSINESS
PUBLIC HEALTH SOLUTIONS	IGF::OT::IGF OTHER FUNCTIONS NYC EXERCISE OPTION YEAR 2 ENUMERATION AT BIRTH (EAB) THE CONTRACTOR SHALL PROVIDE BIRTH RECORDS FOR THE PURPOSE OF OBTAINING SOCIAL SECURITY NUMBER (SSN) AT BIRTH IN ACCORDANCE WITH THE ATTACHED STATEMENT OF WORK.	\$458,834.41	(\$291,444.68)	2016	4/13/2016	SS001461095		2	OTHER THAN SMALL BUSINESS
EXECUTIVE OFFICE OF THE COMMONWEALTH OF PUERTO RICO	IGF::OT::IGF OTHER FUNCTIONS PR EXERCISE OPTION YEAR 2 ENUMERATION AT BIRTH (EAB) THE CONTRACTOR SHALL PROVIDE BIRTH RECORDS FOR THE PURPOSE OF OBTAINING SOCIAL SECURITY NUMBER (SSN) AT BIRTH IN ACCORDANCE WITH THE ATTACHED STATEMENT OF WORK.	\$164,144.42	(\$318,988.76)	2016	5/16/2016	SS001461089		2	OTHER THAN SMALL BUSINESS
HEALTH & SENIOR SERVICES, NEW JERSEY DEPARTMENT OF	IGF::OT::IGF OTHER FUNCTIONS NJ EXERCISE OPTION YEAR 2 ENUMERATION AT BIRTH (EAB) THE CONTRACTOR SHALL PROVIDE BIRTH RECORDS FOR THE PURPOSE OF OBTAINING SOCIAL SECURITY NUMBER (SSN) AT BIRTH IN ACCORDANCE WITH THE ATTACHED STATEMENT OF WORK.	\$393,401.98	(\$319,476.47)	2016	4/13/2016	SS001461096		2	OTHER THAN SMALL BUSINESS
KONIAG SERVICES INC	CONTRACT CLOSEOUT	(\$371,074.91)	(\$371,074.91)	2015	5/19/2015		13 SS000960009	1	SMALL BUSINESS

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Vendor Name	Description of Requirement	Action Obligation	Base and All Options Value	Fiscal Year	Date Signed	PO/Delivery Order/Task Order/Call#	Parent Contract	Mod #	Contracting Officers Business Size Selection
PUBLIC HEALTH, GEORGIA DEPT OF	IGF::OT::IGF OTHER FUNCTIONS GA EXERCISE OPTION YEAR 2 ENUMERATION AT BIRTH (EAB) THE CONTRACTOR SHALL PROVIDE BIRTH RECORDS FOR THE PURPOSE OF OBTAINING SOCIAL SECURITY NUMBER (SSN) AT BIRTH IN ACCORDANCE WITH THE ATTACHED STATEMENT OF WORK.	\$525,599.05	(\$378,559.24)	2016	4/12/2016	SS001461058		2	OTHER THAN SMALL BUSINESS
HEALTH SERVICES, ARIZONA DEPT OF	IGF::OT::IGF OTHER FUNCTIONS AZ EXERCISE OPTION YEAR 2 ENUMERATION AT BIRTH (EAB) THE CONTRACTOR SHALL PROVIDE BIRTH RECORDS FOR THE PURPOSE OF OBTAINING SOCIAL SECURITY NUMBER (SSN) AT BIRTH IN ACCORDANCE WITH THE ATTACHED STATEMENT OF WORK.	\$324,284.87	(\$398,538.34)	2016	4/11/2016	SS001461051		2	OTHER THAN SMALL BUSINESS
HEALTH, OHIO DEPARTMENT OF	IGF::OT::IGF OTHER FUNCTIONS OH EXERCISE OPTION YEAR 2 ENUMERATION AT BIRTH (EAB) THE CONTRACTOR SHALL PROVIDE BIRTH RECORDS FOR THE PURPOSE OF OBTAINING SOCIAL SECURITY NUMBER (SSN) AT BIRTH IN ACCORDANCE WITH THE ATTACHED STATEMENT OF WORK.	\$523,852.13	(\$410,401.80)	2016	5/25/2016	SS001461091		2	OTHER THAN SMALL BUSINESS
PUBLIC HEALTH, ILLINOIS DEPARTMENT OF	IGF::OT::IGF OTHER FUNCTIONS IL EXERCISE OPTION YEAR 2 ENUMERATION AT BIRTH (EAB) THE CONTRACTOR SHALL PROVIDE BIRTH RECORDS FOR THE PURPOSE OF OBTAINING SOCIAL SECURITY NUMBER (SSN) AT BIRTH IN ACCORDANCE WITH THE ATTACHED STATEMENT OF WORK.	\$590,947.07	(\$417,024.67)	2016	4/11/2016	SS001461061		2	OTHER THAN SMALL BUSINESS
HEALTH, PENNSYLVANIA DEPARTMENT OF	IGF::OT::IGF OTHER FUNCTIONS PA EXERCISE OPTION YEAR 2 ENUMERATION AT BIRTH (EAB) THE CONTRACTOR SHALL PROVIDE BIRTH RECORDS FOR THE PURPOSE OF OBTAINING SOCIAL SECURITY NUMBER (SSN) AT BIRTH IN ACCORDANCE WITH THE ATTACHED STATEMENT OF WORK.	\$536,605.38	(\$424,365.76)	2016	5/16/2016	SS001461092		2	OTHER THAN SMALL BUSINESS
KONIAG SERVICES INC	CONTRACT CLOSEOUT	(\$443,183.55)	(\$443,183.55)	2015	5/12/2015		2 SS000960009	5	SMALL BUSINESS
HEALTH, FLORIDA DEPARTMENT OF	IGF::OT::IGF OTHER FUNCTIONS FL EXERCISE OPTION YEAR 2 ENUMERATION AT BIRTH (EAB) THE CONTRACTOR SHALL PROVIDE BIRTH RECORDS FOR THE PURPOSE OF OBTAINING SOCIAL SECURITY NUMBER (SSN) AT BIRTH IN ACCORDANCE WITH THE ATTACHED STATEMENT OF WORK.	\$833,493.70	(\$628,513.01)	2016	4/11/2016	SS001461056		2	OTHER THAN SMALL BUSINESS
CHIMES DISTRICT OF COLUMBIA INCORPORATED	JANITORIAL/CUSTODIAL SERVICES AT THE SSA METRO W	(\$662,181.68)	(\$662,181.68)	2016	10/27/2015	SS000860002		33	OTHER THAN SMALL BUSINESS
KONIAG SERVICES INC	CONTRACT CLOSEOUT	(\$781,012.51)	(\$781,012.51)	2015	5/20/2015		18 SS000960009	3	SMALL BUSINESS
STATE HEALTH SERVICES, TEXAS DEPARTMENT OF	IGF::OT::IGF OTHER FUNCTIONS TX EXERCISE OPTION YEAR 2 ENUMERATION AT BIRTH (EAB) THE CONTRACTOR SHALL PROVIDE BIRTH RECORDS FOR THE PURPOSE OF OBTAINING SOCIAL SECURITY NUMBER (SSN) AT BIRTH IN ACCORDANCE WITH THE ATTACHED STATEMENT OF WORK.	\$1,525,861.22	(\$827,912.08)	2016	5/16/2016	SS001461046		2	OTHER THAN SMALL BUSINESS
KONIAG SERVICES INC	SYSTEM OPERATIONS SUPPORT SERVICES (SOSS) - THE P	(\$1,065,726.18)	(\$1,065,726.18)	2016	10/8/2015		30 SS000960009	1	SMALL BUSINESS
PUBLIC HEALTH, CALIFORNIA DEPARTMENT OF	IGF::OT::IGF OTHER FUNCTIONS CA EXERCISE OPTION YEAR 2 ENUMERATION AT BIRTH (EAB) THE CONTRACTOR SHALL PROVIDE BIRTH RECORDS FOR THE PURPOSE OF OBTAINING SOCIAL SECURITY NUMBER (SSN) AT BIRTH IN ACCORDANCE WITH THE ATTACHED STATEMENT OF WORK.	\$1,881,616.34	(\$1,568,559.08)	2016	5/16/2016	SS001461044		2	OTHER THAN SMALL BUSINESS



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ALLIED HEALTH CARE SERVICES	MOD 31 CONTINUE TO FOLLOW-ON PERIOD VII.	\$1,919,671.82	(\$2,209,646.26)	2015	7/31/2015	SS000860128		31	OTHER THAN SMALL BUSINESS

Transition Team Member Document – Non-Public Information This document may only be disclosed to authorized Transition Team members

Vendor Name	Description of Requirement	Action Obligation	Base and All Options Value	Fiscal Year	Date Signed	PO/Delivery Order/Task Order/Call#	Parent Contract	Mod #	Contracting Officers Business Size Selection
INTERNATIONAL BUSINESS MACHINES CORPORATION	MAINFRAME HARDWARE, CAPACITY UPGRADES AND ASSOCIATED SUPPLIES.	\$300,000.00	\$810,000,000.00	2016	6/17/2016	SS001660010		0	OTHER THAN SMALL BUSINESS
DLT SOLUTIONS INCORPORATED	DISSAO CURRENTLY UTILIZES THE DELL CHANGEAUDITOR SUITE (FORMERLY QUEST) FOR ACTIVE FORENSIC ANALYSIS OF AGENCY USER/WORKSTATION/SERVER RESOURCES AND THE ACTIVE DIRECTORY (AD) INFRASTRUCTURE. OTSO/DISSAO WOULD LIKE TO EXTEND THE FUNCTION OF CHANGEAUDITOR TO INCLUDE SHAREPOINT ACTIVITY. DISSAO CURRENTLY UTILIZES THE DELL CHANGEAUDITOR SUITE (FORMERLY QUEST) FOR ACTIVE FORENSIC ANALYSIS OF AGENCY WORKSTATION/SERVER RESOURCES AND THE ACTIVE DIRECTORY (AD)	\$1,390,200.00	\$7,911,675.64	2015	5/28/2015	SS001530527	W91QUZ06A0004	0	SMALL BUSINESS
INTERNATIONAL BUSINESS MACHINES CORPORATION	ANNUAL MAINTENANCE OFF CONTRACT SS00-16-60010.	\$6,580,084.97	\$6,880,084.97	2016	6/27/2016	SS001630476	SS001660010	0	OTHER THAN SMALL BUSINESS
CENTERRA GROUP, LLC	NATIONAL SUPPORT CENTER ARMED PROTECTIVE SECURITY SERVICES BRIDGE CONTRACT  FPDS FUNCTION - IGF::CT::IGF	\$2,799,654.66	\$5,607,335.52	2016	8/31/2016	SS001660047		0	OTHER THAN SMALL BUSINESS
PHOENIX SOFTWARE INTERNATIONAL, INC.	MAINTENANCE ON PHOENIX SOFTWARE PRODUCTS; (E)JENS, FALCON, NEATEST AND LIFEWORKS.	\$1,059,829.00	\$5,328,917.00	2015	3/25/2015	SS001560023		0	OTHER THAN SMALL BUSINESS
GOODWILL INDUSTRIES OF THE CHESAPEAKE INCORPORATED	FOLLOW-ON YEAR 8: SS00-08-60004	\$5,160,617.23	\$5,160,617.23	2016	2/24/2016	SS000860004		31	OTHER THAN SMALL BUSINESS
DLT SOLUTIONS INCORPORATED	DELL WINDOWS MANAGEMENT AND QUEST ENTERPRISE SINGLE SIGN-ON SOFTWARE MAINTENANCE. THE PURPOSES OF MODIFICATION NUMBER 000002 ARE TO EXERCISE OPTION YEAR 1 CLINS 0004 TO 0020 FOR THE PERIOD OF PERFORMANCE FROM APRIL 30, 2016 THROUGH APRIL 29, 2017 AND ADD PRIVILEGED ACCESS MANAGEMENT SOLUTION.	\$4,884,845.60	\$5,060,186.44	2016	4/28/2016	SS001530527	W91QUZ06A0004	2	SMALL BUSINESS
GOODWILL INDUSTRIES OF THE CHESAPEAKE INCORPORATED	ADMIN. MOD.	\$5,030,182.46	\$5,030,182.46	2015	2/27/2015	SS000860004		29	OTHER THAN SMALL BUSINESS
FALON SOURCING SOLUTIONS LLC	IGF::CT::IGF CONTRACT FOR PRINTING OF SSN CARDS AND NOTICES AT NCC	\$0.00	\$4,541,686.80	2016	11/13/2015	SS001660006		0	SMALL BUSINESS
PITNEY BOWES INC.	IGF::OT::IGF CONTINUE MAINTENANCE OF PITNEY BOWES MAIL INSERTERS AND RELATED SOFTWARE.	\$691,632.00	\$4,362,912.00	2015	6/26/2015	SS001560041		0	OTHER THAN SMALL BUSINESS
XCEL PROTECTIVE SERVICES, INC.	IGF::OT::IGF ARMED GUARD SERVICES - SECOND SUPPORT CENTER THE SOCIAL SECURITY ADMINISTRATION REQUIRES ARMED AND OTHER PROTECTIVE SECURITY SERVICES TO PROTECT PEOPLE AND PROPERTY AT THE SOCIAL SECURITY ADMINISTRATIONS SECOND SUPPORT CENTER AND ADJUNCT RTP (RESEARCH TRIANGLE PARK) BUILDING IN DURHAM, NORTH CAROLINA.	\$2,108,772.00	\$4,237,006.50	2016	7/8/2016	SS001660027		0	SMALL BUSINESS
IRON DATA SOLUTIONS, INC. (DE)	IGF::OT::IGF: SS00-11-60059 TO 0081 - MICROPACT IT ENGINEERING SUPPORT SERVICES FOR IMPLEMENTATION OF NVF SWITCH AND EFI RELEASE 28.0/29.0/30.0/31.0	\$4,186,644.50	\$4,186,644.50	2016	9/20/2016	81 SS001160059		0	OTHER THAN SMALL BUSINESS
ROCKET SOFTWARE, INC.	NEW CONTRACT FOR PERPETUAL UNLIMITED LICENSING FOR MAINFRAME ROCKET SOFTWARE	\$1,718,903.00	\$4,045,307.00	2015	8/18/2015	SS001560048		0	OTHER THAN SMALL BUSINESS
CREATIVE BUSINESS SOLUTIONS, INC.	IGF::OT::IGF LABOR AND MOVING SERVICE CONTRACT	\$1,447,215.50	\$3,988,572.51	2015	7/16/2015	SS001560040		0	SMALL BUSINESS
LIFEBRIDGE HEALTH INCORPORATED	JANITORIAL/CUSTODIAL SERVICES AT THE SSA NCC IN WOODLAWN, MD, AND THE SSA NSC IN URBANA, MD.	\$3,721,563.20	\$3,721,563.20	2016	7/22/2016	SS000860001		29	OTHER THAN SMALL BUSINESS
LIFEBRIDGE HEALTH INCORPORATED	JANITORIAL/CUSTODIAL SERVICES AT THE SSA NCC IN WOODLAWN, MD, AND THE SSA NSC IN URBANA, MD.	\$3,660,291.75	\$3,660,291.75	2015	7/16/2015	SS000860001		28	OTHER THAN SMALL BUSINESS
W & T TRAVEL SERVICES LLC	IGF::CT::IGF SSA REQUIRES TRANSPORTATION SERVICES AT THEIR HEADQUARTERS COMPLEX IN BALTIMORE, MARYLAND, HOTELS IN THE BALTIMORE METROPOLITAN AREA, AND IN WASHINGTON, D.C.	\$676,290.00	\$3,437,811.96	2016	9/26/2016	SS001660052		0	SMALL BUSINESS
INTERNATIONAL BUSINESS MACHINES CORPORATION	SS00-16-60010 - MAINFRAME HARDWARE UPGRADE - DEC 2016 HARDWARE - CAPACITY - HW	\$3,144,100.43	\$3,144,100.43	2017	10/26/2016	SS001730008	SS001660010	0	OTHER THAN SMALL BUSINESS
SYNCSORT INCORPORATED	SOFTWARE MAINTENANCE AND LICENSE UPGRADES FOR SYNCSORT AND ZEN SOFTWARE (ESTABLISH A NEW 5-YEAR CONTRACT).	\$276,742.30	\$2,935,426.64	2015	9/25/2015	SS001560062		0	OTHER THAN SMALL BUSINESS

Vendor Name	Description of Requirement	Action Obligation	Base and All Options Value	Fiscal Year	Date Signed	PO/Delivery Order/Task Order/Call#	Parent Contract	Mod #	Contracting Officers Business Size Selection
NATIONAL DISABILITY RIGHTS NETWORK INC	REPRESENTATIVE PAYEE REVIEWS	\$265,568.22	\$2,508,068.22	2015	8/25/2015	SS000960111		26	OTHER THAN SMALL BUSINESS
DINO SOFTWARE CORPORATION	FY15 DINO T. REX RECOMPETE	\$427,913.93	\$2,504,104.67	2015	7/23/2015	SS001550208		0	SMALL BUSINESS
	IGF::CL::IGF								
NATIONAL DISABILITY RIGHTS NETWORK INC	REPRESENTATIVE PAYEE REVIEWS	\$2,242,500.00	\$2,242,500.00	2015	8/25/2015	SS001530883	SS000960111	0	OTHER THAN SMALL BUSINESS
	IGF::CL::IGF								
NATIONAL DISABILITY RIGHTS NETWORK INC	REPRESENTATIVE PAYEE REVIEWS	\$2,242,500.00	\$2,242,500.00	2015	8/25/2015	SS001530883	SS000960111	0	OTHER THAN SMALL BUSINESS
FALON SOURCING SOLUTIONS LLC	SECOND SUPPORT CENTER (SSC) PRINT MAIL FACILITY	\$0.00	\$2,196,379.08	2016	11/18/2015	SS001660005		0	SMALL BUSINESS
THE ARC OF BALTIMORE INCORPORATED (1428)	FOLLOW-ON YEAR 9 - GROUNDS MAINTENANCE	\$2,122,728.38	\$2,122,728.38	2016	7/25/2016	SS000860012		50	OTHER THAN SMALL BUSINESS
	PURCHASE ACTION SOFTWARE INTERNATIONAL EVENTACTION SOFTWARE LICENSES AND MAINTENANCE AND ASSOCIATED TRAINING.	\$1,200,000.00	\$2,064,000.00	2015	7/29/2015	SS001560044		0	OTHER THAN SMALL BUSINESS
MAZDA COMPUTER CORPORATION									
	FUNDING FOR HM FURNITURE PROJECTS HAVING A BONA FIDE NEED IN FY 2015								
HERMAN MILLER, INC.	SCHEDULE: MULTIPLE SITES INVOLVED. PERIOD OF PERFORMANCE TO BE DETERMINED. ATTACHED SPREADSHEET INCLUDES AN ESTIMATE COMPLETED DATE PER SITE.	\$1,980,524.28	\$1,980,524.28	2015	9/15/2015	SS001530979	SS001260003	0	OTHER THAN SMALL BUSINESS
TETON DATA SYSTEMS INC	IGF::CT::IGF STATIREF SUBSCRIPTION RENEWAL	\$306,250.00	\$1,969,390.00	2015	2/19/2015	SS001550052		0	SMALL BUSINESS
PITNEY BOWES GLOBAL FINANCIAL SERVICES LLC	SS00-13-60018 MAINTENANCE SERVICE AND METER RENTAL (OPTION YEAR 2)	\$1,861,666.00	\$1,861,666.00	2015	6/30/2015	SS001530672	SS001360018	0	OTHER THAN SMALL BUSINESS
HENSEL PHELPS SERVICES LLC	IGF::OT::IGF	\$1,590,237.00	\$1,590,237.00	2016	7/22/2016	SS001461106		8	OTHER THAN SMALL BUSINESS
	IGF::CT::IGF PG&E UTILITY SERVICES FOR FHFB. ELECTRICITY AND GAS (PP = 8/1/16-7/31/17).	\$1,493,652.00	\$1,493,652.00	2016	6/27/2016	SS091630003	GS00P07BSD0505	0	OTHER THAN SMALL BUSINESS
PACIFIC GAS AND ELECTRIC COMPANY									
	IGF::OT::IGF THIS IS A COST REIMBURSEMENT TASK ORDER FOR THE NATIONAL ACADEMY OF SCIENCES TO FORM A CONSENSUS COMMITTEE TO PROVIDE FINDINGS AND CONCLUSIONS ON IMPROVING HEALTH OUTCOMES FOR CHILDREN WITH DISABILITIES. THE COMMITTEE WILL: 1. PROVIDE A COMPREHENSIVE LIST OF PROGRAMS, SERVICES, AND TREATMENTS AVAILABLE (NATIONALLY, REGIONALLY, AND LOCALLY) FOR IMPROVING HEALTH OUTCOMES AMONG SSI CHILDREN (OF ALL AGES) WITH MENTAL, SPEECH, AND LANGUAGE DISORDERS, INCLUDING SSI YOUTH WITH MENTAL, SPEECH, AND LANGUAGE DISORDERS AS THEY TRANSITION FROM HIGH SCHOOL TO THE WORKPLACE OR HIGHER EDUCATION; 2. PROVIDE A COMPREHENSIVE, ANALYTICAL REVIEW OF EFFECTIVE AND EVIDENCE-BASED PROGRAMS, SERVICES, AND TREATMENTS THAT IMPROVE HEALTH OUTCOMES FOR SSI CHILDREN AND YOUTH WHILE IN SCHOOL AND AS THEY TRANSITION FROM HIGH SCHOOL TO THE WORKPLACE OR HIGHER EDUCATION; AND 3. PROVIDE FINDINGS AND CONCLUSIONS FOR SSA INVOLVEMENT AND FUTURE RESEARCH.	\$1,490,829.00	\$1,490,829.00	2016	6/3/2016	7 SS001360048		0	OTHER THAN SMALL BUSINESS
NATIONAL ACADEMY OF SCIENCES									
	THE PURPOSE OF THIS MODIFICATION IS NECESSARY TO EXERCISE FOLLOW-ON YEAR NINE (9) - JULY 1, 2016 TO JUNE 30, 2017.								
CROSSROADS BUILDING SERVICES INCORPORATED	N/A PRIOR 03/01/2012	\$1,459,561.62	\$1,459,561.62	2016	6/29/2016	SS000760045		33	OTHER THAN SMALL BUSINESS

Vendor Name	Description of Requirement	Action Obligation	Base and All Options Value	Fiscal Year	Date Signed	PO/Delivery Order/Task Order/Call#	Parent Contract	Mod #	Contracting Officers Business Size Selection
NATIONAL ACADEMY OF SCIENCES	NAS/IOM TASK ORDER FOR A CONSENSUS COMMITTEE TO PROVIDE AN OVERVIEW OF ASSISTIVE DEVICES THAT RELATE TO PHYSICAL AND MENTAL DISORDERS AND FUNCTIONING FOR ADULTS (INCLUDING YOUNG ADULTS AS THEY TRANSITION FROM HIGH SCHOOL TO THE WORKPLACE)&TO PROVIDE A COMPREHENSIVE REVIEW OF SELECTED ASSISTIVE DEVICES THAT RELATE TO PHYSICAL AND MENTAL DISORDERS AND FUNCTIONING FOR ADULTS (INCLUDING YOUNG ADULTS AS THEY TRANSITION FROM HIGH SCHOOL TO THE WORKPLACE). THE SELECTED ASSISTIVE DEVICES INCLUDE WHEELED/SEATED MOBILITY DEVICES AND UPPER EXTREMITY PROSTHESES. IGF::OT::IGF	\$1,423,609.00	\$1,423,609.00	2015	9/9/2015		6 SS001360048	0	OTHER THAN SMALL BUSINESS
PITNEY BOWES GLOBAL FINANCIAL SERVICES LLC	BUY METER MAINTENANCE SERVICES AND POSTAGE METER RENTALS	\$1,413,966.00	\$1,413,966.00	2016	6/29/2016	SS001630512	SS001360018	0	OTHER THAN SMALL BUSINESS
NATIONAL ACADEMY OF SCIENCES	IGF::OT::IGF CONSENSUS STUDY COMMITTEE TO PROVIDE FINDINGS AND CONCLUSIONS ON HEALTH CARE UTILIZATIONS AND DISABILITY.	\$1,389,752.00	\$1,389,752.00	2016	8/29/2016		8 SS001360048	0	OTHER THAN SMALL BUSINESS
PACIFIC GAS AND ELECTRIC COMPANY	IGF::CT::IGF FHFB UTILITIES - ELECTRICITY AND GAS (8/1/15-7/31/16)	\$1,389,444.00	\$1,389,444.00	2015	7/11/2015	SS091530013	GS00P07BSD0505	0	OTHER THAN SMALL BUSINESS
BIXAL SOLUTIONS INCORPORATED	IGF::OT::IGF SBA 8(A) IDIQ CONTRACT- BIXAL SOLUTIONS, INC.: WEBSITE DESIGN/DEVELOPMENT AND RELATED WEB CONTENT MANAGEMENT SYSTEM (WCMS) SERVICES.	\$0.00	\$1,307,522.34	2016	8/22/2016	SS001660007		0	SMALL BUSINESS
NATIONAL DISABILITY RIGHTS NETWORK INC	REPRESENTATIVE PAYEE REVIEWS - THE PURPOSE OF THIS MODIFICATION IS TO EXTEND "EXTENSION PERIOD 2" FOR A PERIOD OF 3 MONTHS. IGF::OT::IGF	\$132,784.11	\$1,254,034.11	2016	3/23/2016	SS000960111		28	OTHER THAN SMALL BUSINESS
HENSEL PHELPS SERVICES LLC	TWO MONTH EXTENSION	\$1,225,700.00	\$1,225,700.00	2017	11/23/2016	SS001461106		10	OTHER THAN SMALL BUSINESS
MICROSOFT CORPORATION SITZ IN REDMOND CORPORATION	IGF::CT::IGF TASK ORDER 27 AGAINST CONTRACT NUMBER SS00-13-60014 WITH MICROSOFT FOR OFFICE OF THE INSPECTOR GENERAL INVESTIGATIVE CASE MANAGEMENT	\$1,198,836.00	\$1,198,836.00	2016	6/30/2016		27 SS001360014	0	OTHER THAN SMALL BUSINESS
NATIONAL DISABILITY RIGHTS NETWORK INC	IGF::CT::IGF THE CONTRACTOR SHALL PROVIDE REPRESENTATIVE PAYEE REVIEWS.	\$1,121,250.00	\$1,121,250.00	2016	3/23/2016	SS001630252	SS000960111	0	OTHER THAN SMALL BUSINESS
MICROSOFT CORPORATION SITZ IN REDMOND CORPORATION	IGF::OT::IGF TASK ORDER 23 AGAINST MICROSOFT CONTRACT FOR CONTINUING SUPPORT SERVICES FROM MICROSOFT FOR LYNC SERVER 2013 AND SYSTEM CENTER CONFIGURATION MANAGER 2012 SOFTWARE.	\$371,791.00	\$1,115,383.00	2016	10/1/2015		23 SS001360014	0	OTHER THAN SMALL BUSINESS
FACTIVA, INC	IGF::CT::IGF SUBSCRIPTION RENEWAL TO FACTIVA.COM	\$202,694.40	\$1,086,941.40	2015	9/8/2015	SS001550153		0	OTHER THAN SMALL BUSINESS
TECHNICA LLC	IGF::CT::IGF THIS CONTRACT IS FOR SUPPLY TECHNICIANS TO RUN THE SUPPLY STORE AT ODAR IN FALLS CHURCH, VA.	\$205,881.96	\$1,045,600.80	2016	9/27/2016	SS001660055		0	SMALL BUSINESS
IRON DATA SOLUTIONS, INC. (DE)	IGF::OT::IGF IDIQ CONTRACT SS00-11-60059(IRON DATA SOLUTIONS, INC.) TASK ORDER 0075: CHANGE, ASSET, AND PROBLEM REPORTING SYSTEM (CAPRS)SUPPORT, NATIONAL VENDOR FILE (NVF)SYNCHRONIZATION PHASE III. PERIOD OF PERFORMANCE IS 09/25/2015 - 09/29/2016.	\$999,200.00	\$999,200.00	2015	7/24/2015		75 SS001160059	0	OTHER THAN SMALL BUSINESS
NOBIS ENTERPRISES, INC.	FILE CLERK SERVICES - CONTRACTOR SHALL PROVIDE FILE CLERK SERVICES TO THE CENTER FOR HUMAN RESOURCES (CHR) IN ACCORDANCE WITH THE STATEMENT OF WORK. IGF::CT::IGF	\$96,475.20	\$974,256.60	2016	3/3/2016	SS041660001		0	OTHER THAN SMALL BUSINESS
DLT SOLUTIONS INCORPORATED	MAINTAIN DELL WINDOWS MANAGEMENT SOFTWARE	\$972,148.50	\$972,148.50	2015	1/27/2015	SS001530230	W91QUZ06A0004	0	SMALL BUSINESS
INTERNATIONAL BUSINESS MACHINES CORPORATION	ACQUIRE MAINFRAME INFRASTRUCTURE HARDWARE FOR THE NSC AND SSC	\$966,900.00	\$966,900.00	2016	6/27/2016	SS001630478	SS001660010	0	OTHER THAN SMALL BUSINESS
EASTMAN KODAK COMPANY	IGF::OT::IGF MAINTENANCE OF TWO KODAK SOCIAL SECURITY CARD PRINTERS AND RELATED SOFTWARE.	\$138,298.74	\$962,750.10	2016	12/23/2015	SS001650047		0	OTHER THAN SMALL BUSINESS

Vendor Name	Description of Requirement	Action Obligation	Base and All Options Value	Fiscal Year	Date Signed	PO/Delivery Order/Task Order/Call#	Parent Contract	Mod #	Contracting Officers Business Size Selection
IRON DATA SOLUTIONS, INC. (DE)	IGF::OT::IGF IDIQ CONTRACT SS00-11-60059(IRON DATA SOLUTIONS, INC.) TASK ORDER 0074: EFI RELEASE 28.0, 29.0, 30.0&31.0 USER NEEDS ANALYSIS, LIMITED ENGLISH PROFICIENCY (LEP) BASE + PILOT, WORKLOAD SUPPORT UNITS (WSU) EXPANSION BASE, PILOT + RETROFIT, DISABILITY HEARING OFFICE (DHO) SAMPLING PILOT + RETROFIT. PERIOD OF PERFORMANCE IS AWARD THROUGH 6 MONTHS.	\$894,602.50	\$894,602.50	2015	6/18/2015	74	SS001160059	0	OTHER THAN SMALL BUSINESS
CONSOLIDATED EDISON COMPANY OF NEW YORK, INC.	IGF::CT::IGF PROVIDE ELECTRIC UTILITY TRANSMISSION AND DISTRIBUTION SERVICE TO THE ADDABBO FEDERAL BUILDING.	\$890,000.00	\$890,000.00	2015	7/28/2015	SS021530006	GS00P14BSD1058	0	OTHER THAN SMALL BUSINESS
CONSOLIDATED EDISON COMPANY OF NEW YORK, INC.	IGF::CT::IGF PROVIDE ELECTRIC UTILITY TRANSMISSION AND DISTRIBUTION SERVICE AT THE ADDABBO FEDERAL BUILDING AT 155-10 JAMAICA AVE, NY 11432 PERIOD OF PERFORMANCE FROM AUGUST 1, 2016 TO JUNE 31, 2017.  THE PURPOSE OF THIS MODIFICATION IS TO FIX THE ACCOUNT NUMBER. THE ACCOUNT NUMBER WAS MISSING A 0. THE CORRECT ACCOUNT NUMBER IS 295112 1300 0001 8.								
CONSOLIDATED EDISON COMPANY OF NEW YORK, INC.	ALL OTHER TERMS AND CONDITIONS REMAIN UNCHANGED.	\$840,000.00	\$840,000.00	2016	5/16/2016	SS021630006	GS00P14BSD1058	0	OTHER THAN SMALL BUSINESS
INTERNATIONAL BUSINESS MACHINES CORPORATION	MAINFRAME ZAAP AND ZIIP CAPACITY UPGRADES	\$779,733.96	\$779,733.96	2016	9/21/2016	SS001630732	SS001660010	0	OTHER THAN SMALL BUSINESS
COMPUWARE CORPORATION	IGF::CT::IGF SOLE SOURCE PURCHASE ORDER TO PROVIDE MODIFICATIONS TO COMPUWARE WORKBENCH SOFTWARE TO ISOLATE AND SANITIZE PERSONALLY IDENTIFIABLE INFORMATION/FEDERAL TAX INFORMATION (PII/FTI) DATA. PERIOD OF PERFORMANCE IS 12-MONTHS FROM DATE OF AWARD.	\$732,465.00	\$732,465.00	2015	3/17/2015	SS001560020		0	OTHER THAN SMALL BUSINESS
THE ARC OF BALTIMORE INCORPORATED (1428)	THE ARC FOY8	\$2,200,484.97	\$683,129.97	2015	7/29/2015	SS000860012		47	OTHER THAN SMALL BUSINESS
ADMIRAL ELEVATOR COMPANY, INC.	REMOTE MONITORING OF ELEVATORS AND ESCALATORS AT SSA HEADQUARTERS  IGF::OT::IGF	\$642,394.00	\$642,394.00	2015	9/30/2015	SS001560066		0	SMALL BUSINESS
FEDCAP REHABILITATION SERVICES INC	NEPSC-CUSTODIAL SERVICE CONTRACT (NISH): THE PURPOSE OF MODIFICATION NUMBER 20 IS TO AWARD FOLLOW-ON YEAR 8 FOR THE PERIOD OF PERFORMANCE FROM SEPTEMBER 1, 2016 THROUGH AUGUST 31, 2017.	\$3,915,287.88	\$607,638.80	2016	8/19/2016	SS000960002		20	OTHER THAN SMALL BUSINESS
GT SOFTWARE, INC.	MODIFICATION - CHANGE PERIOD OF PERFORMANCE ON BASE PERIOD AND OPTION YEARS TO RENEWAL OF SS00-14-51032	\$163,969.20	\$597,509.74	2015	12/11/2014	SS001560008		0	SMALL BUSINESS
MICROSOFT CORPORATION SITZ IN REDMOND CORPORATION	IGF::CT::IGF MODIFICATION 0001 TO TASK ORDER 27 AGAINST CONTRACT NUMBER SS00-13-60014 WITH MICROSOFT FOR OIG INVESTIGATIVE CASE MANAGEMENT TO ADD SERVICES WITHIN SCOPE AND ADDITIONAL FUNDING.	\$585,687.00	\$585,687.00	2016	9/8/2016	27	SS001360014	1	OTHER THAN SMALL BUSINESS
HENSEL PHELPS SERVICES LLC	IGF::OT::IGF  ONE MONTH EXTENSION	\$557,758.00	\$557,758.00	2016	9/27/2016	SS001461106		9	OTHER THAN SMALL BUSINESS

Vendor Name	Description of Requirement	Action Obligation	Base and All Options Value	Fiscal Year	Date Signed	PO/Delivery Order/Task Order/Call#	Parent Contract	Mod #	Contracting Officers Business Size Selection
MICROSOFT CORPORATION SITZ IN REDMOND CORPORATION	IGF::CT::IGF OSOHE REQUIRES MICROSOFT PROPRIETARY SUPPORT SERVICES FOR ENGINEERING AND CONSULTING TO ASSIST SSA WITH FURTHER DEVELOPING THE EXCHANGE 2013 INFRASTRUCTURE. THIS INCLUDES DEVELOPMENT, TESTING, AND IMPLEMENTATION OF ADDITIONAL REQUIREMENTS ASSOCIATED WITH THE MESSAGING INFRASTRUCTURE. THESE NEW REQUIREMENTS AND INFRASTRUCTURES WILL ENHANCE THE AGENCY'S CAPABILITIES DRIVEN BY POLICY AND ORGANIZATIONAL OPERATIONS DECISIONS.  AT A MINIMUM, THE CONTRACTOR WILL PROVIDE THE TASKS, ACTIVITIES AND DELIVERABLES DESCRIBED IN THE SOW. THE CONTRACTOR WILL SUBMIT DOCUMENTS AND DELIVERABLES IN MICROSOFT OFFICE 10, PROJECT 2010, OR VISIO PROFESSIONAL 2010 FORMAT; OR THE CURRENT VERSION OF THESE DOCUMENTS AS AVAILABLE TO AGENCY EMPLOYEES INVOLVED WITH THIS TASK UNDER OUR LICENSING AGREEMENT WITH MICROSOFT.	\$551,460.00	\$551,460.00	2016	6/28/2016	25	SS001360014	0	OTHER THAN SMALL BUSINESS
MICROSOFT CORPORATION SITZ IN REDMOND CORPORATION	IGF::CT::IGF FIRM FIXED PRICE TASK ORDER TO PROVIDE SUPPORT SERVICES FOR MICROSOFT SYSTEM CENTER CONFIGURATION MANAGER FOR THE DIVISION OF INTEGRATION AND ENVIRONMENTAL TESTING	\$137,865.00	\$551,460.00	2017	10/1/2016	30	SS001360014	0	OTHER THAN SMALL BUSINESS
MICROSOFT CORPORATION SITZ IN REDMOND CORPORATION	IGF::OT::IGF  TASK ORDER 24 IS BEING PLACED AGAINST CONTRACT SS00-13-60014. THIS TASK ORDER IS FOR MICROSOFT TO ASSISTANCE WITH THE MIGRATION FROM SHAREPOINT 2010 TO 2013 FOR COLLABORATION.	\$549,407.00	\$549,407.00	2016	2/18/2016	24	SS001360014	0	OTHER THAN SMALL BUSINESS
MICROSOFT CORPORATION SITZ IN REDMOND CORPORATION	IGF::OT::IGF  TASK ORDER 21 AGAINST MICROSOFT CONTRACT FOR CONTINUING SUPPORT SERVICES FROM MICROSOFT FOR WINDOWS 10 DEPLOYMENT AND IMAGE OPTIMIZATION.	\$542,832.00	\$542,832.00	2015	8/21/2015	21	SS001360014	0	OTHER THAN SMALL BUSINESS
POTOMAC EDISON COMPANY, THE	DELIVERY ORDER AGAINST GSA CONTRACT NUMBER GS-00P-08-BSD-0539 TO PROVIDE SERVICE FOR LOCAL DISTRIBUTION OF ELECTRIC POWER AND SPECIAL FACILITY DEDICATED CAPACITY TO THE NATIONAL SUPPORT CENTER IN URBANA MARYLAND THROUGH POTOMAC EDISON. FPDS FUNCTION: IGF::OT::IGF	\$541,944.00	\$541,944.00	2015	7/22/2015	SS001530732	GS00P08BSD0539	0	OTHER THAN SMALL BUSINESS
POTOMAC EDISON COMPANY, THE	DELIVERY ORDER AGAINST GSA CONTRACT NUMBER GS-00P-08-BSD-0539 TO PROVIDE LOCAL DISTRIBUTION OF ELECTRIC POWER TO THE NATIONAL SUPPORT CENTER IN URBANA IGF::OT::IGF	\$533,944.00	\$533,944.00	2016	7/22/2016	SS001630506	GS00P08BSD0539	0	OTHER THAN SMALL BUSINESS
MICROSOFT CORPORATION SITZ IN REDMOND CORPORATION	IGF::OT::IGF TASK ORDER 17 AGAINST MICROSOFT CONTRACT SS00-13-60014 FOR SHAREPOINT INFRASTRUCTURE MIGRATION SERVICES.	\$531,259.92	\$531,259.92	2015	1/14/2015	17	SS001360014	0	OTHER THAN SMALL BUSINESS
SOLAR TURBINES INCORPORATED	PROVIDE FUNDING FOR OPTION YEAR #9 OF THE SOLAR TURBINE MAINTENANCE CONTRACT AND CHANGE POC	\$527,180.94	\$527,180.94	2016	5/5/2016	SS000760043		23	OTHER THAN SMALL BUSINESS
MICROSOFT CORPORATION SITZ IN REDMOND CORPORATION	IGF::OT::IGF  TASK ORDER 19 AGAINST MICROSOFT CONTRACT FOR CONTINUING SUPPORT SERVICES FROM MICROSOFT FOR EXCHANGE SOFTWARE.	\$522,240.00	\$522,240.00	2015	7/8/2015	19	SS001360014	0	OTHER THAN SMALL BUSINESS
FEDCAP REHABILITATION SERVICES INC	NEPSC-CUSTODIAL SERVICE CONTRACT (NISH): THE PURPOSE OF MODIFICATION NUMBER 19 IS TO AWARD FOLLOW-ON YEAR 7 FOR THE PERIOD OF PERFORMANCE FROM SEPTEMBER 1, 2015 THROUGH AUGUST 31, 2016.	\$3,774,088.44	\$511,745.36	2015	8/31/2015	SS000960002		19	OTHER THAN SMALL BUSINESS
SOLAR TURBINES INCORPORATED	GENERATOR MAINTENANCE - NCC MOD TO EXERCISE OPTION PERIOD 8.	\$502,077.12	\$502,077.12	2015	5/29/2015	SS000760043		20	OTHER THAN SMALL BUSINESS
INTERNATIONAL BUSINESS MACHINES CORPORATION	ZEC12 PHYSICAL MAINFRAME HARDWARE UPGRADES	\$489,760.00	\$489,760.00	2017	10/1/2016	SS001730002	SS001660010	0	OTHER THAN SMALL BUSINESS

Vendor Name	Description of Requirement	Action Obligation	Base and All Options Value	Fiscal Year	Date Signed	PO/Delivery Order/Task Order/Call#	Parent Contract	Mod #	Contracting Officers Business Size Selection
	CUSTODIAL, MECHANICAL, MAINTENANCE, AND PII AND TRASH SORTING SERVICES AT THE SOCIAL SECURITY ADMINISTRATION (SSA) SECURITY WEST BUILDING IN BALTIMORE, MD.  NOTE: DUE TO A PRE-EXISTING LEASE AGREEMENT WITH THE GENERAL SERVICES ADMINISTRATION, ONLY TCG MANAGEMENT CORPORATION (HEREAFTER REFERRED TO AS "TCG") CAN PERFORM THE REQUIRED SERVICES. IN ADDITION, AS THE SOLE OWNER OF VARIOUS HVAC EQUIPMENT AT THE DESIGNATED PLACE OF PERFORMANCE, TCG WILL NOT PERMIT OPERATION OF SUCH EQUIPMENT BY ANY OTHER ENTITY DUE TO LIABILITY ISSUES. THUS, SSA INTENDS TO ACQUIRE SUPPORT ON A SOLE SOURCE BASIS WITH TCG.								
TCG PROPERTY CORPORATION	SERVICE CONTRACT FUNCTION TYPE = IGF::CT::IGF	\$77,638.92	\$463,030.16	2016	8/31/2016	SS001660039		0	SMALL BUSINESS
MOTION PICTURE LICENSING CORPORATION	MOTION PICTURE LICENSING CORPORATION UMBRELLA COPYRIGHT INFRINGEMENT LICENSE	\$88,500.00	\$460,000.00	2015	1/26/2015	SS001550068		0	SMALL BUSINESS
TIS AMERICAS, INC.	INCREASE IN LICENSING ALONG WITH THE INSTALLATION AND INTEGRATION EXPERTISE OF TIS TO ALLOW FOR THE AUTOMATION OF THE MANUAL PROFILING AND INDEXING PROCESS IN THE ATLANTA WORK TRACK (WT) CASE MANAGEMENT SYSTEM.	\$453,780.00	\$453,780.00	2016	9/27/2016	SS001660054		0	SMALL BUSINESS
NATIONAL ASSOCIATION FOR PUBLIC HEALTH STATISTICS AND INFORM	IGF::OT::IGF ORDER FOR NAPHIS ELECTRONIC VERIFICATION OF VITAL EVENTS (EVVE) SYSTEM	\$444,191.88	\$444,191.88	2016	6/30/2016	SS001630514	SS001260091	0	OTHER THAN SMALL BUSINESS
IRON DATA SOLUTIONS, INC. (DE)	IGF::OT::IGF: TASK ORDER 0078 AGAINST SSA IDIQ CONTRACT SS00-11-60059 FOR SERVICES TO PERFORM SERVER 2012 FIXES IN TORONTO AND ST. LOUIS, MO. PERFORMANCE PERIOD FROM DATE OF AWARD THROUGH APRIL 2016.	\$433,426.00	\$433,426.00	2015	9/17/2015	78 SS001160059		0	OTHER THAN SMALL BUSINESS
EATON CORPORATION	IGF::OT::IGF MAINTENANCE AND SERVICE FOR SOCIAL SECURITY ADMINISTRATION'S (SSA) NATIONAL COMPUTER CENTER FOUR 2,000 KVA UNINTERRUPTIBLE POWER SUPPLY (UPS) AND SUBSYSTEMS.	\$139,766.52	\$431,878.68	2015	9/29/2015	SS001560064		0	OTHER THAN SMALL BUSINESS
COMMONWEALTH EDISON COMPANY (8600)	IGF::CT::IGF COMMONWEALTH EDISON (COMED) CONTRACT	\$400,008.00	\$400,008.00	2016	8/1/2016	SS051630017	GS00P05BSD0361	0	OTHER THAN SMALL BUSINESS
COMMONWEALTH EDISON COMPANY (8600)	IGF::CT::IGF COMMONWEALTH EDISON CONTRACT  REQUEST FOR SERVICE TO PROVIDE TRANSMISSION OF ELECTRICAL SERVICE TO THE HAROLD WASHINGTON SOCIAL SECURITY CENTER.	\$400,008.00	\$400,008.00	2015	7/11/2015	SS051530022	GS00P05BSD0361	0	OTHER THAN SMALL BUSINESS
PITNEY BOWES INC.	SOLE SOURCE TO PITNEY BOWES FOR DF WORKS SERVER AND SOFTWARE UPGRADE	\$377,299.46	\$377,299.46	2015	9/10/2015	SS001560060		0	OTHER THAN SMALL BUSINESS
TIS AMERICAS, INC.	RENEWAL OF MAINTENANCE ON TOP IMAGE SYSTEMS (TIS) EFLOW SOFTWARE PRODUCTS ON CONTRACT NUMBER SS00-16-60004 FOR THE PERIOD OF PERFORMANCE FROM NOVEMBER 1, 2016 THROUGH OCTOBER 31, 2017.	\$375,350.00	\$375,350.00	2017	10/13/2016	SS001760004		0	SMALL BUSINESS
INNOVATION DATA PROCESSING, INC.	MAINTENANCE RENEWAL FOR INNOVATION DATA PROCESSING SOFTWARE	\$370,824.00	\$370,824.00	2016	3/29/2016	SS001660012		0	OTHER THAN SMALL BUSINESS
SKILLTRAN LLC	IGF::OT::IGF OCCUBROWSE SUBSCRIPTION RENEWAL	\$88,749.96	\$368,749.96	2015	8/25/2015	SS001550224		0	OTHER THAN SMALL BUSINESS
DLT SOLUTIONS INCORPORATED	MAINTAIN DELL DB/VIRTUALIZATION SOFTWARE	\$362,171.28	\$362,171.28	2015	5/29/2015	SS001431508	W91QUZ06A0004	1	SMALL BUSINESS
DALLAS LIGHTHOUSE FOR THE BLIND, INC.	IGF::OT::IGF MANAGE AND MAINTAIN THE MAIL ROOM AND SUPPLY ROOM AT SSA REGIONAL OFFICE IN DALLAS, TEXAS.	\$63,139.00	\$361,303.00	2015	7/21/2015	SS061560003		0	OTHER THAN SMALL BUSINESS
TIS AMERICAS, INC.	RENEWAL OF MAINTENANCE ON TOP IMAGE SYSTEMS (TIS) EFLOW SOFTWARE PRODUCTS FOR THE PERIOD OF PERFORMANCE FROM NOVEMBER 1, 2015 THROUGH OCTOBER 31, 2016.	\$351,830.00	\$351,830.00	2016	10/14/2015	SS001660004		0	SMALL BUSINESS
PECO ENERGY COMPANY	DISTRIBUTION OF ELECTRICITY FOR MATSSC IGF::CT::IGF	\$350,000.00	\$350,000.00	2015	6/19/2015	SS031530007	GS00P06BSD0447	0	OTHER THAN SMALL BUSINESS

Vendor Name	Description of Requirement	Action Obligation	Base and All Options Value	Fiscal Year	Date Signed	PO/Delivery Order/Task Order/Call#	Parent Contract	Mod #	Contracting Officers Business Size Selection
PECO ENERGY COMPANY	THIS DELIVERY ORDER IS AGAINST THE PECO GSA GWAC CONTRACT FOR THE TRANSMISSION OF ELECTRICITY FROM THE ENERGY PROVIDER, TALEN ENERGY.IGF::OT::IGF	\$350,000.00	\$350,000.00	2016	7/11/2016	SS031630009	GS00P16BSD1212	0	OTHER THAN SMALL BUSINESS
DLT SOLUTIONS INCORPORATED	MAINTAIN DELL DB/VIRTUALIZATION SOFTWARE	\$349,227.78	\$349,227.78	2016	4/22/2016	SS001431508	W91QUZ06A0004	2	SMALL BUSINESS
AHTNA ENGINEERING SERVICES	THE PURPOSE OF THIS MODIFICATION IS NECESSARY TO EXERCISE OPTION YEAR IX. AUGUST 1, 2016 TO JULY 31, 2017.  N/A PRIOR 03/01/2012 - NOT APPLICABLE-BASE AWARD ISSUED PRIOR TO 03/01/2012	\$11,237,651.16	\$342,671.16	2016	7/25/2016	SS000760063		33	SMALL BUSINESS
FUTRON INC	RECOVERY - THIS PROCUREMENT IS TO PROVIDE AN IT FIT OUT FOR TWO MULTI MEDIA CONFERENCING ROOMS AT THE NSC.	\$200,768.09	\$333,383.24	2015	9/10/2015	SS001530904	GS35F5400H	0	SMALL BUSINESS
BOWHEAD PROFESSIONAL SOLUTIONS, LLC	IGF::OT::IGF  THIS IS A ROUTINE TASK ORDER AGAINST CONTRACT SS00-14-61008 FOR OPTION YEAR II. THIS DELIVERY ORDER IS FOR IT SUPPORT SERVICES.	\$326,771.18	\$326,771.18	2015	1/23/2015	SS001530213	SS001461008	0	SMALL BUSINESS
QOGNIFY, INC.	IGF::CT::IGF NATIONAL SUPPORT CENTER (NSC) ELECTRONIC SECURITY SYSTEM COMPONENTS SERVICE AND SUPPORT AGREEMENT FOR THE SITUATOR AND VISION SYSTEMS	\$105,000.00	\$316,990.00	2016	9/30/2016	SS001660050		0	OTHER THAN SMALL BUSINESS
OBERTHUR TECHNOLOGIES OF AMERICA CORP	IGF::CT::IGF HSPD 12 CARDSTOCK REPLACEMENT  HOMELAND SECURITY PRESIDENTIAL DIRECTIVE 12 GUIDELINES REQUIRES THE AGENCY TO USE AND MAINTAIN CARDSTOCK FOR CREDENTIAL REPLACEMENT. THE PURCHASE OF CARDSTOCK TAKES PLACE EVERY THREE YEARS AND IS USED FOR CERTIFICATE AND BIOMETRIC RENEWAL, LIFECYCLE REPLACEMENT, AND EVENT DRIVEN REPLACEMENT.	\$315,000.00	\$315,000.00	2016	7/21/2016	SS001650188		0	OTHER THAN SMALL BUSINESS
MICROSOFT CORPORATION SITZ IN REDMOND CORPORATION	IGF::CT::IGF SIX MONTHS OF MCS SUPPORT FOR THE WINDOWS 10 DEPLOYMENT AND IMAGE OPTIMIZATION TASK.	\$302,757.00	\$302,757.00	2016	8/16/2016	29	SS001360014	0	OTHER THAN SMALL BUSINESS
WILLIAM DATA SYSTEMS, LLC	RENEWAL OF MAINTENANCE ON GOVERNMENT OWNED MAINFRAME SOFTWARE LICENSES OF WILLIAMS DATA SYSTEMS EXIGENCE ZEN TRACE, EXIGENCE GROUP TRACE AND IMPLEX (ZENN ENTERPRISE EXTENDER MONITOR - FERRET, ZEN OSA MONITOR AND ZEN NETWORK AUTOMATION) SOFTWARE. REFERENCE PURCHASE ORDER SS00-14-61017.	\$302,420.44	\$302,420.44	2015	12/19/2014	SS001560011		0	SMALL BUSINESS
SIGNET TECHNOLOGIES, INC.	IGF::CT::IGF - ENHANCED SERVICE PLAN FOR THE INTEGRATED LENEL ONGUARD SECURITY MANAGEMENT SYSTEMS	\$96,816.00	\$294,384.00	2015	7/13/2015	SS001550198		0	SMALL BUSINESS
IRON DATA SOLUTIONS, INC. (DE)	IGF::OT::IGF SS00-11-60059 O 0077 - MICROPACT MS OFFICE 2013 COMPLIANCE UPDATES: THE PURPOSE OF THIS ORDER IS TO HAVE MICROPACT ST. LOUIS AND TORONTO IMPLEMENT THE CHANGES FOR MICROSOFT OFFICE 2013 ON THEIR WINDOWS BASED SERVICES SOFTWARE TO ENSURE THIS APPLICATION RUNS ON THE NEW SERVER 2012 PLATFORM AND ARE COMPATIBLE FOR IMPLEMENTATION TO 47 DDS SITES.	\$275,623.00	\$275,623.00	2016	7/18/2016	77	SS001160059	0	OTHER THAN SMALL BUSINESS
BIXAL SOLUTIONS INCORPORATED	IGF::OT::IGF SBA 8(A) CONTRACT- BIXAL SOLUTIONS, INC.: WEBSITE DESIGN/DEVELOPMENT AND RELATED WEB CONTENT MANAGEMENT SYSTEM (WCMS) SERVICES. TASK ORDER 0001: OIG WEBSITE HOSTING	\$46,761.39	\$274,577.73	2016	8/23/2016	1	SS001660007	0	SMALL BUSINESS
HERMAN MILLER, INC.	DURHAM, NC #R328 RELOCATION - DESIGN, INSTALLATION AND PRODUCT FOR SYSTEMS FURNITURE	\$263,015.08	\$263,015.08	2015	7/10/2015	SS001530708	SS001260003	0	OTHER THAN SMALL BUSINESS



Vendor Name	Description of Requirement	Action Obligation	Base and All Options Value	Fiscal Year	Date Signed	PO/Delivery Order/Task Order/Call#	Parent Contract	Mod #	Contracting Officers Business Size Selection
MICROSOFT CORPORATION SITZ IN REDMOND CORPORATION	IGF::OT::IGF  TASK ORDER 20 AGAINST MICROSOFT CONTRACT FOR CONTINUING SUPPORT SERVICES FROM MICROSOFT FOR SYSTEM CENTER CONFIGURATION MANAGER (SCCM) SOFTWARE METERING&ASSET MANAGEMENT.	\$260,896.00	\$260,896.00	2015	8/20/2015	20	SS001360014	0	OTHER THAN SMALL BUSINESS
KEYPOINT GOVERNMENT SOLUTIONS, INC.	IGF::CT::IGF  BACKGROUND INVESTIGATIONS FOR ADMINISTRATIVE LAW JUDGES	\$250,000.00	\$250,000.00	2016	7/6/2016	SS001660026		0	OTHER THAN SMALL BUSINESS
NATIONAL ASSOCIATION FOR PUBLIC HEALTH STATISTICS AND INFORM	IGF::OT::IGF TECHNICAL ASSISTANCE AND TESTING OF STATE ELECTRONIC DEATH REGISTRATION SYSTEMS (EDRS).	\$0.00	\$240,226.00	2016	10/23/2015	SS001660002		0	OTHER THAN SMALL BUSINESS
IRON DATA SOLUTIONS, INC. (DE)	IGF::OT::IGF SS00-11-60059 TO 0082 - MICROPACT IT ENGINEERING SUPPORT SERVICES FOR ONGOING IMPLEMENTATION AND MAINTENANCE OF THE CHANGE, ASSET, AND PROBLEM REPORTING SYSTEM (CAPRS) MODULE OF THE SSA ELECTRONIC DISABILITY PROCESSING SYSTEM.	\$236,704.00	\$236,704.00	2016	8/31/2016	82	SS001160059	0	OTHER THAN SMALL BUSINESS
CRA INTERNATIONAL, INC.	IGF::OT::IGF EXPERT WITNESS SERVICES TO LITIGATE A CLASS ACTION BEFORE THE EEOC	\$75,043.00	\$236,256.00	2015	6/4/2015	SS001560036		0	OTHER THAN SMALL BUSINESS
ADMIRAL ELEVATOR COMPANY, INC.	IGF::OT::IGF  TASK ORDER #42 SS00-15-30359  NATIONAL COMPUTER CENTER 4TH FLOOR INNER CORE REMOVE CARPET TILE AND INSTALL NEW GFM REPLACEMENT CARPET TILE WITH GFM GLUE.	\$234,804.39	\$234,804.39	2015	4/27/2015	SS001530359	SS001060042	0	SMALL BUSINESS
BILLINGHURST, CRAIG MD	BILLINGHURST - CALL ORDER - CASES IGF::CL::IGF	\$233,758.50	\$233,758.50	2015	6/1/2015	13	SS061140003	0	SMALL BUSINESS
EMPLOYMENT RESEARCH CORPORATION	IGF::OT::IGF OGC REQUIRES THE SERVICES OF AN EXPERT (CONTRACTOR) TO LITIGATE AN ARBITRATION BETWEEN SSA AND THE AMERICAN FEDERATION OF GOVERNMENT EMPLOYEES (AFGE OR UNION) BEFORE ARBITRATOR JONATHAN KAUFMANN.	\$75,000.00	\$225,000.00	2016	7/14/2016	SS001660030		0	SMALL BUSINESS
SCHNIEWIND JR MD, HENRY	THE CONTRACTOR SHALL COMPLETE INDEPENDENT CASE REVIEWS IN ACCORDANCE WITH TERMS AND CONDITIONS SET FORTH IN THIS RMC BPA. IGF::CL::IGF	\$207,984.50	\$207,984.50	2016	3/18/2016	1	SS01164C031	0	SMALL BUSINESS
SCHNIEWIND JR MD, HENRY	THE CONTRACTOR SHALL COMPLETE INDEPENDENT CASE REVIEWS IN ACCORDANCE WITH TERMS AND CONDITIONS SET FORTH IN THIS RMC BPA. IGF::CL::IGF	\$207,984.50	\$207,984.50	2016	3/18/2016	1	SS01164C031	0	SMALL BUSINESS
AHTNA ENGINEERING SERVICES	SSANRC-CLERICAL CONTRACT - INCORPORATE REVISED PRICING PER CONTRACTOR'S REQUEST FOR EQUITABLE ADJUSTMENT.  N/A PRIOR 03/01/2012 - NOT APPLICABLE-BASE AWARD ISSUED PRIOR TO 03/01/2012	\$203,475.00	\$203,475.00	2016	12/11/2015	SS000760063		30	SMALL BUSINESS
TCG PROPERTY CORPORATION	IGF::OT::IGF - CONTRACT SS00-15-60056 FOR MECHANICAL MAINTENANCE, CUSTODIAL, AND TRASH SORTING SERVICES AT THE SOCIAL SECURITY ADMINISTRATION'S SECURITY WEST BUILDING IN BALTIMORE, MD.	\$65,857.08	\$198,464.28	2015	8/27/2015	SS001560056		0	SMALL BUSINESS
CARASOFT TECHNOLOGY CORPORATION	VMWARE MAINTENANCE RENEWAL FOR SS00-12-40047 CALL 4.	\$0.00	\$196,384.00	2015	9/23/2015	8	SS001240047	0	SMALL BUSINESS
PHOENIX SOFTWARE INTERNATIONAL, INC.	PHOENIX INTERNATIONAL SOFTWARE, INC. - ADDITIONAL LICENSE UPGRADE AND MAINTENANCE FEES DUE TO AN UPGRADE TO SYSTEM 81.	\$194,112.45	\$194,112.45	2015	2/24/2015	SS001060048		19	SMALL BUSINESS
ALLIED HEALTH CARE SERVICES	MOD 30 EXTEND FOLLOW-ON PERIOD VI UNTIL 7/31/2015.	\$184,323.65	\$184,323.65	2015	6/30/2015	SS000860128		30	OTHER THAN SMALL BUSINESS
HENSEL PHELPS SERVICES LLC	IGF::OT::IGF NATIONAL SUPPORT CENTER (NSC) OPERATIONS AND MAINTENANCE MOD 2 SUPPLEMENTAL AGREEMENT WITHIN SCOPE	\$182,094.00	\$182,094.00	2015	3/3/2015	SS001461106		3	OTHER THAN SMALL BUSINESS

Vendor Name	Description of Requirement	Action Obligation	Base and All Options Value	Fiscal Year	Date Signed	PO/Delivery Order/Task Order/Call#	Parent Contract	Mod #	Contracting Officers Business Size Selection
SCHNEIDER ELECTRIC USA, INC.	IGF::CT::IGF - PURCHASE ORDER SS00-15-50276 FOR TECHNICAL SUPPORT, PREVENTIVE AND ON-SITE MAINTENANCE, AND REMOTE DIAGNOSTIC SUPPORT FOR THE SCHNEIDER ELECTRIC POWERLOGIC MONITORING SYSTEM AT THE SOCIAL SECURITY ADMINISTRATION'S MAIN CAMPUS BUILDINGS AND NATIONAL COMPUTER CENTER IN BALTIMORE, MD.	\$38,477.19	\$181,924.07	2015	9/1/2015	SS001550276		0	OTHER THAN SMALL BUSINESS
PERFORMANCE ASSOCIATES, INC.	NEW CONTRACT FOR PERFORMANCE ASSOCIATES PAI/O DRIVER FOR Z/OS AND TAPE MAINTENANCE RENEWAL REFERENCE OLD CONTRACT SS00-13-60023	\$58,267.00	\$180,101.00	2016	10/2/2015	SS001660001		0	SMALL BUSINESS
AVANTGARDE TRANSLATIONS, INC.	IGF::CT::IGF CRITICAL FUNCTION  PERIOD OF PERFORMANCE: 09/30/2015 - 9/29/2016  CONTRACTOR TO PROVIDE TRANSLATION OF ENGLISH LANGUAGE DOCUMENTS INTO ANY 21 FOREIGN TRANSLATION AND UPDATES OF PREVIOUSLY TRANSLATED WORK IN ACCORDANCE WITH THE PRICES ESTABLISHED BY THE CONTRACT IN SECTION A AND THE TERMS OF SECTION B OF THE CONTRACT. ACTUAL PUBLICATIONS TO BE TRANSLATED WILL BE SENT WITH A WORK ORDER AS DESCRIBED IN CONTRACT SECTION C-4.4 ORDERING OFFICIAL. THIS TASK ORDER FULFILLS THE GUARANTEED MINIMUM FOR OPTION YEAR 3 OF THE CONTRACT.	\$180,000.00	\$180,000.00	2015	7/14/2015	SS001530679	SS001260096	0	SMALL BUSINESS
AMERICAN MEDICAL ASSOCIATION	IGF::CT::IGF AMERICAN MEDICAL ASSOCIATION - DIRECTORY OF PHYSICIANS PROFILE SUBSCRIPTION RENEWAL	\$180,000.00	\$180,000.00	2016	6/9/2016	SS001650136		0	OTHER THAN SMALL BUSINESS
AMERICAN MEDICAL ASSOCIATION	IGF::CT::IGF AMERICAN MEDICAL ASSOCIATION SUBSCRIPTION RENEWAL	\$180,000.00	\$180,000.00	2015	6/17/2015	SS001550171		0	OTHER THAN SMALL BUSINESS
AVANTGARDE TRANSLATIONS, INC.	IGF::OT::IGF OTHER FUNCTION TRANSLATION SERVICES TO CONVERT SSA'S PUBLICATIONS INTO OVER 21 DIFFERENT LANGUAGES. THESE FUNDS WILL BE APPLIED TO OPTION YEAR 4 OF CONTRACT SS00-12-60096 WITH ADVANTGARDE TRANSLATIONS.	\$180,000.00	\$180,000.00	2016	8/4/2016	SS001630633	SS001260096	0	SMALL BUSINESS
IRON DATA SOLUTIONS, INC. (DE)	IGF::OT::IGF OTHER FUNCTION TASK ORDER TO PROVIDE THE 47 DDS SITES CURRENTLY USING THE MICROPACT SOFTWARE WITH ACCESS TO CONTRACTORS PERSONNEL DURING THE ADDITIONAL HOURS OF 6:00 A.M. TO 8:00 A.M. EST AND 5:00 P.M. TO 10:00 P.M. EST.	\$44,950.00	\$178,360.00	2017	10/1/2016	83	SS001160059	0	OTHER THAN SMALL BUSINESS
IRON DATA SOLUTIONS, INC. (DE)	IGF::OT::IGF IDIQ CONTRACT SS00-11-60059(IRON DATA SOLUTIONS, INC.)-- TASK ORDER 0079: EXTENDED SERVICE COVERAGE (ESC)TO 47 DDS SITES CURRENTLY USING THE IRON DATA SOFTWARE.	\$174,720.00	\$174,720.00	2016	10/2/2015	79	SS001160059	0	OTHER THAN SMALL BUSINESS
LOOK SOFTWARE PTY. LTD.	MAINTAIN LOOK NEWLOOK AND SMARTCLIENT SOFTWARE	\$174,294.00	\$174,294.00	2015	5/1/2015	SS001560033		0	OTHER THAN SMALL BUSINESS
LOOK SOFTWARE PTY. LTD.	RENEWAL OF SS00-15-60033 FOR MAINTENANCE ON LOOK SMARTCLIENT.	\$174,294.00	\$174,294.00	2016	6/1/2016	SS001660018		0	OTHER THAN SMALL BUSINESS
DEES, MD, TOM M	DEES - CALL ORDER - RMC  IGF::CL::IGF	\$173,995.00	\$173,995.00	2015	5/13/2015	13	SS061140009	0	SMALL BUSINESS
LIPSKI, MARCIA	PERIOD OF PERFORMANCE 04/01/2016 TO 03/31/2017. THE CONTRACTOR SHALL COMPLETE INDEPENDENT CASE REVIEWS IN ACCORDANCE WITH THE TERMS AND CONDITIONS SET FORTH IN THE RMC BPA. IGF::CL::IGF	\$173,021.00	\$173,021.00	2016	3/21/2016	1	SS01164C032	0	SMALL BUSINESS
HERMAN MILLER, INC.	CHARLESTON, SC XY18 DESIGN, ODAR SECONDARY ACTION, PRODUCT AND INSTALLATION FOR SYSTEMS FURNITURE	\$168,465.20	\$168,465.20	2016	4/12/2016	SS001630293	SS001260003	0	OTHER THAN SMALL BUSINESS
FUTURENET SECURITY SOLUTIONS, LLC	PERIMETER SECURITY SYSTEM MAINTENANCE AND REPAIR FOR THE SECOND SUPPORT CENTER IN DURHAM, NC.  FPDS FUNCTION: IGF::OT::IGF	\$27,912.00	\$167,460.00	2016	9/30/2016	SS001660053		0	OTHER THAN SMALL BUSINESS
HERMAN MILLER, INC.	SAN LUIS OBISPO, CA C986 - DESIGN,INSTALLATION AND PRODUCT ESTIMATE FOR SYSTEMS FURNITURE	\$165,996.54	\$165,996.54	2015	5/29/2015	SS001530547	SS001260003	0	OTHER THAN SMALL BUSINESS

Vendor Name	Description of Requirement	Action Obligation	Base and All Options Value	Fiscal Year	Date Signed	PO/Delivery Order/Task Order/Call#	Parent Contract	Mod #	Contracting Officers Business Size Selection
BOWHEAD PROFESSIONAL SOLUTIONS, LLC	IGF::OT::IGF  THE SOCIAL SECURITY ADMINISTRATION (SSA) HAS A REQUIREMENT FOR CONTRACTOR SERVICES TO SUPPORT OUR AUTOMATED DATA PROCESSING CAPABILITIES AT CLAIMS-TAKING FOREIGN SERVICE POSTS (FSP) SITES.  JUSTIFICATION: THESE SERVICES ARE REQUIRED TO PROVIDE SUPPORT FOR RELOCATIONS (CURRENT BUILDING LOCATION TO ANOTHER BUILDING LOCATION), INSTALLATIONS AND UPGRADES OF INTELLIGENT WORKSTATIONS (IWS) AND LOCAL AREA NETWORK (LAN) COMPONENTS IN VARIOUS FSP SITES. THE SERVICES PROVIDES FOR THE COMPLETE INSTALLATION OF NEW FSP SITES AND TECHNOLOGY REFRESHMENTS AT EXISTING SITES. THE PROJECT WILL BE MULTI-PHASED IN NATURE AND WILL REQUIRE SITE VISITS, INSTALLATION, TRAINING, SHIPPING, AND PROJECT MANAGEMENT.	\$165,936.76	\$165,936.76	2015	12/19/2014	SS001530142	SS001461008	1	SMALL BUSINESS
MILA C. R. BACALLA MD	CHICAGO REGION MEDICAL CONSULTANT IGF::CT::IGF	\$164,232.00	\$164,232.00	2016	6/27/2016		2 SS05164C001	0	SMALL BUSINESS
EASTMAN KODAK COMPANY	PURCHASE NEW CONTROLLERS FOR KODAK VL2000 CARD PRINTERS	\$162,000.00	\$162,000.00	2015	8/10/2015	SS001550233		0	OTHER THAN SMALL BUSINESS
OUTTZ, JAMES & ASSOCIATES	IGF::OT::IGF OFFICE OF GENERAL COUNSEL, EXPERT WITNESS CONSULTING SERVICES FOR LITGATION OF A CLASS ACTION PENDING BEFORE EEOC	\$74,800.00	\$159,800.00	2015	5/26/2015	SS001560037		0	SMALL BUSINESS
MICROSOFT CORPORATION SITZ IN REDMOND CORPORATION THE ARC OF BALTIMORE INCORPORATED (1428)	IGF::CT::IGF TASK ORDER FOR MICROSOFT SOLUTION FOR ODP REDUCING THE DISABILITY BACKLOG USING PROGRAMMATIC DATA. SOCIAL SECURITY ADMINISTRATION (SSA) OFFICE OF RETIREMENT AND DISABILITY POLICY (ORDP) REQUIRES MICROSOFT CONSULTING SERVICES WITH DEEP KNOWLEDGE OF MICROSOFT BUSINESS INTELLIGENCE TOOLS WITHIN SQL SERVER, SHAREPOINT AND MICROSOFT OFFICE COMPONENTS TO REVIEW AND MAKE APPLICATION AND ARCHITECTURE RECOMMENDATIONS, TRANSFER KNOWLEDGE AND HELP ODPMI LEVERAGE THE FULL CAPABILITIES OF EXISTING MICROSOFT TOOLS SSA HAS ALREADY LICENSED. THE OFFICE OF DISABILITY PROGRAMS (ODP) HAS BROUGHT SEVERAL RELATED PROJECTS TOGETHER UNDER A CONSOLIDATED INITIATIVE TO ADDRESS STRATEGIC GOALS: 1. ELIMINATE OUR HEARINGS BACKLOG AND PREVENT ITS RECURRENCE; AND 2. IMPROVE THE SPEED AND QUALITY OF OUR DISABILITY PROCESS.	\$156,702.00	\$156,702.00	2016	8/4/2016	28 SS000860012	SS001360014	0	OTHER THAN SMALL BUSINESS
HELP/SYSTEMS, LLC	RIVER JACK STONE PROJECT RENEWAL OF SS00-16-50015 AND SS00-16-5009L FOR MAINTENANCE ON HELPSYSTEMS VULNERABILITY ASSESSMENT AND BYTWARE.	\$151,654.00	\$151,654.00	2016	5/10/2016			49	OTHER THAN SMALL BUSINESS
		\$150,757.00	\$150,757.00	2017	11/1/2016	SS001750022		0	OTHER THAN SMALL BUSINESS
MICROSOFT CORPORATION SITZ IN REDMOND CORPORATION	IGF::OT::IGF TASK ORDER 18 TO CONTRACT SS00-13-60014. MICROSOFT WILL PROVIDE ENGINEERING AND CONSULTING SERVICES FOR THE OFFICE OF RETIREMENT AND DISABILITY POLICY.	\$149,384.00	\$149,384.00	2015	2/9/2015	18 SS001360014		0	OTHER THAN SMALL BUSINESS
HERMAN MILLER, INC.	LENEXA, KS 1779 PHASED RECONFIGURATION FOR SYSTEMS FURNITURE	\$146,520.78	\$146,520.78	2015	7/8/2015	SS001530687	SS001260003	0	OTHER THAN SMALL BUSINESS
PHILADELPHIA, CITY OF- WATER DEPARTMENT	POTABLE WATER AND WATER FOR FIRE SUPPRESSION FOR MATSSC, PERIOD OF PERFORMANCE 08/01/2015 TO 07/31/2016 IGF::CT::IGF	\$146,294.00	\$146,294.00	2015	6/16/2015	SS031550012		0	OTHER THAN SMALL BUSINESS
PHILADELPHIA, CITY OF- WATER DEPARTMENT	REGION 3 UTILITIES - THIS AWARD IS FOR PROCUREMENT OF WATER AND FIRE SUPPRESSION SERVICES FOR THE SOCIAL SECURITY ADMINISTRATION LOCATED AT 300 SPRING GARDEN STREET, PHILADELPHIA PA 19123. PERIOD OF PERFORMANCE IS 8/1/2016 THROUGH 7/31/2017 IGF::OT::IGF	\$146,293.56	\$146,293.56	2016	6/7/2016	SS031650005		0	OTHER THAN SMALL BUSINESS

Vendor Name	Description of Requirement	Action Obligation	Base and All Options Value	Fiscal Year	Date Signed	PO/Delivery Order/Task Order/Call#	Parent Contract	Mod #	Contracting Officers Business Size Selection
HERMAN MILLER, INC.	CASA GRANDE, AZ #R903 - DESIGN, INSTALLATION AND PRODUCT ESTIMATE FOR SYSTEMS FURNITURE	\$146,176.96	\$146,176.96	2015	4/16/2015	SS001530416	SS001260003	0	OTHER THAN SMALL BUSINESS
HERMAN MILLER, INC.	PANAMA CITY, FL #R668 - INSTALLATION SERVICES AND PRODUCT FOR SYSTEMS FURNITURE	\$142,045.06	\$142,045.06	2015	5/18/2015	SS001530514	SS001260003	0	OTHER THAN SMALL BUSINESS
NEW YORK, CITY OF	IGF::CT::IGF WATER AND SEWER SERVICES AT THE JOSEPH P ADDABBO BUILDING IN JAMAICA, NY.	\$140,000.00	\$140,000.00	2016	6/13/2016	SS021650006		0	OTHER THAN SMALL BUSINESS
KANG CHANG-WUK MD PA	IGF::CT::IGF NEW CALL ORDER FOR BPA 6/1/2015 DR. KANG SS00-11-40086	\$139,400.00	\$139,400.00	2016	11/15/2015	8	SS001140086	2	SMALL BUSINESS
HERMAN MILLER, INC.	BRUNSWICK, GA C614 DESIGN, PRODUCT AND INSTALLATION FOR SYSTEMS FURNITURE	\$137,435.08	\$137,435.08	2017	10/28/2016	SS001730021	SS001260003	0	OTHER THAN SMALL BUSINESS
WILLIAM BACKLUND MD	BACKLUND - MC, REGION 10 ADD FUNDING AND CASES IGF::CL::IGF CLOSELY ASSOCIATED	\$136,000.00	\$136,000.00	2016	2/8/2016	2	SS10154C004	0	SMALL BUSINESS
HERMAN MILLER, INC.	J169 SADDLEBROOK (TSC), NJ - DESIGN, INSTALLATION AND PRODUCT ESTIMATE FOR SYSTEMS FURNITURE	\$134,146.50	\$134,146.50	2015	3/16/2015	SS001530321	SS001260003	0	OTHER THAN SMALL BUSINESS
EDAC SYSTEMS, INC.	DEBT MANAGEMENT SCANNER FOR MATPSC	\$132,394.86	\$132,394.86	2016	9/21/2016	SS001650260		0	SMALL BUSINESS
BROWN, ROY C	BROWN, MC, SS10-15-4C001 ADD FUNDS AND CASES IGF::CL::IGF CLOSELY ASSOCIATED	\$130,500.00	\$130,500.00	2016	2/8/2016	2	SS10154C001	0	SMALL BUSINESS
NEW YORK, CITY OF	IGF::CT::IGF WATER AND SEWER SERVICES AT THE JOSEPH P ADDABBO BUILDING IN JAMAICA NY.	\$130,000.00	\$130,000.00	2015	6/10/2015	SS021550007		0	OTHER THAN SMALL BUSINESS
BALTIMORE SOUND ENGINEERING, INC.	REPAIR THE SSA PUBLIC ADDRESS SYSTEM	\$129,205.00	\$129,205.00	2015	5/6/2015	SS001530427	SS001360029	0	SMALL BUSINESS
EDAC SYSTEMS, INC.	MAINTENANCE FOR IBML SCANNERS.	\$128,444.95	\$128,444.95	2017	11/1/2016	SS001750018		0	SMALL BUSINESS
D R MYERS DISTRIBUTING CO	DOCUTECTOR FORGERY DETECTION DATABASE SUBSCRIPTION FOR SSA DIGITAL LIBRARY	\$42,540.00	\$127,620.00	2016	2/12/2016	SS001650050		0	SMALL BUSINESS
EMERGENT, LLC	MAINTENANCE ON INTERCEDE MYID SOFTWARE	\$126,631.63	\$126,631.63	2016	12/23/2015	SS001650042		0	OTHER THAN SMALL BUSINESS
PITNEY BOWES INC.	MAINTENANCE ON PITNEY BOWES SERVERS AND SOFTWARE	\$126,060.51	\$126,060.51	2015	12/31/2014	SS001550061		0	OTHER THAN SMALL BUSINESS
MICROSOFT CORPORATION SITZ IN REDMOND CORPORATION	IGF::CT::IGF  THE SOCIAL SECURITY ADMINISTRATION (SSA) OFFICE OF INSPECTOR GENERAL (OIG) REQUIRES MICROSOFT CONSULTING SERVICES (MCS) TO PROVIDE ENGINEERING AND CONSULTING ASSISTANCE TO DESIGN, BUILD, AND DEPLOY AN ALLEGATION CALL CENTER SOLUTION. THIS IS BEING ORDERED AS A TASK ORDER AGAINST EXISTING CONTRACT SS00-13-60014	\$124,991.00	\$124,991.00	2015	9/16/2015	22	SS001360014	0	OTHER THAN SMALL BUSINESS
IMMIXTECHNOLOGY, INC.	RENEWAL OF SS00-16-51003 FOR MAINTENANCE ON HP FORTIFY	\$124,466.38	\$124,466.38	2017	10/6/2016	SS001750011		0	OTHER THAN SMALL BUSINESS
AFFIGENT, LLC	PURCHASE OF ORACLE ADVANCED COMPRESSION PLUS SUPPORT	\$123,974.19	\$123,974.19	2016	8/16/2016	SS001630668	W91QUZ09A0001	0	OTHER THAN SMALL BUSINESS
IMMIXTECHNOLOGY, INC.	MAINTENANCE ON VARIOUS FORTIFY SOFTWARE LICENSES	\$120,236.65	\$120,236.65	2016	10/6/2015	SS001651003		0	OTHER THAN SMALL BUSINESS
INNOVATION DATA PROCESSING, INC.	THE PURCHASE OF ADDITIONAL MSU'S TO SUPPORT THE MARCH 21, 2015 HARDWARE MAINFRAME UPGRADES DUE TO THE NSC TRANSITION.	\$117,896.80	\$117,896.80	2015	3/11/2015	SS001550008		3	OTHER THAN SMALL BUSINESS
KANG CHANG-WUK MD PA	IGF::CT::IGF NEW CALL ORDER FOR BPA 6/1/2015 DR. KANG SS00-11-40086	\$116,030.00	\$116,030.00	2015	4/15/2015	8	SS001140086	0	SMALL BUSINESS
MAURICE PROUT	THE PURPOSE OF THIS ACTION IS TO ADD INDEPENDENT CASE REVIEWS AT THE BPA RATES. IGF::CL::IGF	\$115,425.00	\$115,425.00	2016	3/15/2016	3	SS03154C021	0	SMALL BUSINESS
HERMAN MILLER, INC.	EX97 - OAKLAND (ODAR), CA - REQUISITION IS TO ORDER REMAINING DESIGN SERVICES AND NEW INSTALLATION AND PRODUCT FOR SYSTEMS FURNITURE.	\$114,240.00	\$114,240.00	2015	7/23/2015	SS001530403	SS001260003	1	OTHER THAN SMALL BUSINESS
HEALTHEWAY, INC.	IGF::OT::IGF MODIFICATION TO REVISE SECTION A PRICING TABLES AND SECTION B-1 STATEMENT OF WORK (SCOPE)TO THE SOLE-SOURCE MEMBERSHIP AGREEMENT/CONTRACT WITH THE NEW NON-FOR-PROFIT HEALTHEWAY THAT OPERATIONALLY MANAGES THE EHEALTH EXCHANGE	\$0.00	\$114,000.00	2015	3/2/2015	SS001360012		2	OTHER THAN SMALL BUSINESS
HERMAN MILLER, INC.	STILLWATER, OK (RB46) - SERVICES (DESIGN, INSTALLATION AND ESTIMATED PRODUCT FOR SYSTEMS FURNITURE	\$111,201.08	\$111,201.08	2015	6/17/2015	SS001530631	SS001260003	0	OTHER THAN SMALL BUSINESS

Vendor Name	Description of Requirement	Action Obligation	Base and All Options Value	Fiscal Year	Date Signed	PO/Delivery Order/Task Order/Call#	Parent Contract	Mod #	Contracting Officers Business Size Selection
MAXIMUS FEDERAL SERVICES, INC.	TICKET PROGRAM DATA OPERATIONS CENTER MANAGER (TPDOCM)  IGF::CT::IGF	\$111,057.00	\$111,057.00	2015	9/28/2015	SS001360046		3	OTHER THAN SMALL BUSINESS
CAMPION SERVICES INC	IGF::OT::IGF OGC WILL REQUIRE THE SERVICES OF AN EXPERT TO ASSIST IN A ARBITRATION CASE. A EXPERT WILL BE NEEDED TO ANALYZE THE "ADMINISTRATIVE LAW JUDGE WORK ANALYSIS STUDY" AND ALSO ANALYZE THE QUALIFICATIONS AND TESTIMONY OF THE UNION WITNESSES. THE CONTRACTOR WILL PROVIDE REPORTS, DECLARATIONS, AND TESTIMONY DETAILING THE UNIONS ANALYSIS IN THIS ARBITRATION.	\$110,000.00	\$110,000.00	2016	4/26/2016	SS001650106		0	SMALL BUSINESS
THOMSON REUTERS (PROFESSIONAL) UK LTD	IGF::OT::IGF WECOMPLY TRAINING SUBSCRIPTION CONTAINING A FULL ETHICS AND COMPLIANCE LIBRARY.	\$110,000.00	\$110,000.00	2015	8/3/2015	SS001550232		0	OTHER THAN SMALL BUSINESS
IRON DATA SOLUTIONS, INC. (DE)	IGF::OT::IGF  IDIQ CONTRACT SS00-11-60059(IRON DATA SOLUTIONS, INC.)-- TASK ORDER 0071: IRON DATA ST. LOUIS AND TORONTO WINDOWS 2012 SERVER, WINDOWS IE11 COMPATABILITY AND OPERABILITY TESTING								
PDFTRON SYSTEMS INC	PERIOD OF PERFORMANCE: 12/15/2014 THROUGH 06/15/2015 PDFNET LICENSES FOR DCE-FECS	\$109,192.00	\$109,192.00	2015	12/15/2014	71 SS001160059		0	OTHER THAN SMALL BUSINESS
HELP/SYSTEMS, LLC	MAINTENANCE RENEWAL- ISERIES AUDIT AND VULNERABILITY ASSESSMENT TOOL (COMPLIANCE MONITOR)	\$106,311.00	\$106,311.00	2016	10/19/2015	SS001650015		0	OTHER THAN SMALL BUSINESS
CHICAGO SOFT, LTD.	CHICAGO SOFTWARE MVS QUICK/REF	\$104,518.00	\$104,518.00	2016	5/16/2016	SS001650114		0	SMALL BUSINESS
M-TECH MECHANICAL, LLC	IGF::OT::IGF  OVERHAUL CHILLER NUMBER 6 IN THE WEST LOW RISE BUILDING INCLUDING UPGRADING STARTER AND CONTROL PANEL	\$101,345.00	\$101,345.00	2015	8/24/2015	SS001550252		0	SMALL BUSINESS
MICROPACT GLOBAL, INC.	RENEWAL OF SS00-16-50017 FOR MAINTENANCE ON MICROPACT GLOBAL, FORMERLY IRON DATA SOFTWARE. THIS SOFTWARE SUPPORTS ALL ASPECTS OF THE CLAIMS ADJUDICATION FUNCTION, INCLUDING THE ABILITY TO RECEIVE AND CLOSE ELECTRONIC DISABILITY CASES; REQUEST AND PAY FOR MEDICAL EVIDENCE AND CONSULTATIVE EXAMINATIONS AS WELL AS PERFORM MEDICAL ASSESSMENTS AND PREPARE DISABILITY DETERMINATIONS.	\$100,876.93	\$100,876.93	2017	10/21/2016	SS001750012		0	OTHER THAN SMALL BUSINESS
IRON DATA SOLUTIONS, INC. (DE)	IGF::OT::IGF IDIQ CONTRACT SS00-11-60059(IRON DATA SOLUTIONS, INC.) TASK ORDER 0073: IMPLEMENT CDB/DI CHANGES TO ENSURE CORRECT SYSTEMS OVERRIDE(SO)CODES ARE PASSED IN THE NATIONAL DISABILITY DETERMINATION SERVICE SYSTEM (NDDSS), UPDATE DDS FORMS TO REFLECT CURRENT REGULATORY AND POLICY REQUIREMENTS. PERIOD OF PERFORMANCE IS AWARD THROUGH 3-MONTHS (CLIN 1), AND AWARD THROUGH 4-MOTNHS (CLINS 2/3).	\$100,387.00	\$100,387.00	2015	3/12/2015	73 SS001160059		0	OTHER THAN SMALL BUSINESS
TECHFIRST, INC.	IGF::CT::IGF SIGN LANGUAGE INTERPRETER SERVICES NEEDED AS A REASONABLE ACCOMMODATION FOR EMPLOYEES WHO ARE DEAF OF HARD OF HEARING	\$100,000.00	\$100,000.00	2017	10/25/2016	SS001750014		0	SMALL BUSINESS
IRON DATA SOLUTIONS, INC. (DE)	RENEWAL OF MAINTENANCE ON IRON DATA SOFTWARE FROM PREVIOUS ORDER SS00-15-50033.	\$96,532.98	\$96,532.98	2016	10/29/2015	SS001650017		0	OTHER THAN SMALL BUSINESS
MICROSOFT CORPORATION SITZ IN REDMOND CORPORATION	IGF::CT::IGF TASK ORDER 26 FOR MICROSOFT SYSTEM CENTER CONFIGURATION MANAGER (SCCM) OPERATING SYSTEM DEPLOYMENT (OSD) CONFIGURATION CONSULTING	\$95,823.00	\$95,823.00	2016	6/29/2016	26 SS001360014		0	OTHER THAN SMALL BUSINESS
HERMAN MILLER, INC.	ROCKINGHAM, NC C342 DESIGN, PRODUCT AND INSTALLATION SERVICES FOR SYSTEMS FURNITURE	\$95,734.35	\$95,734.35	2016	5/2/2016	SS001630347	SS001260003	0	OTHER THAN SMALL BUSINESS

Vendor Name	Description of Requirement	Action Obligation	Base and All Options Value	Fiscal Year	Date Signed	PO/Delivery Order/Task Order/Call#	Parent Contract	Mod #	Contracting Officers Business Size Selection
TECHFIRST, INC.	IGF::CT::IGF SIGN LANGUAGE INTERPRETER SERVICES NEEDED AS A REASONABLE ACCOMMODATION FOR AN EMPLOYEE WHO IS DEAF OR HARD OF HEARING	\$95,443.20	\$95,443.20	2016	7/18/2016	SS001650200		0	SMALL BUSINESS
BOWHEAD PROFESSIONAL SOLUTIONS, LLC	IGF::OT::IGF  THE SOCIAL SECURITY ADMINISTRATION (SSA) HAS A REQUIREMENT FOR CONTRACTOR SERVICES TO SUPPORT OUR AUTOMATED DATA PROCESSING CAPABILITIES AT CLAIMS-TAKING FOREIGN SERVICE POSTS (FSP) SITES.  JUSTIFICATION: THESE SERVICES ARE REQUIRED TO PROVIDE SUPPORT FOR RELOCATIONS (CURRENT BUILDING LOCATION TO ANOTHER BUILDING LOCATION), INSTALLATIONS AND UPGRADES OF INTELLIGENT WORKSTATIONS (IWS) AND LOCAL AREA NETWORK (LAN) COMPONENTS IN VARIOUS FSP SITES. THE SERVICES PROVIDES FOR THE COMPLETE INSTALLATION OF NEW FSP SITES AND TECHNOLOGY REFRESHMENTS AT EXISTING SITES. THE PROJECT WILL BE MULTI-PHASED IN NATURE AND WILL REQUIRE SITE VISITS, INSTALLATION, TRAINING, SHIPPING, AND PROJECT MANAGEMENT.	\$93,074.72	\$93,074.72	2015	12/8/2014	SS001530142	SS001461008	0	SMALL BUSINESS
R S I CORP	RENEWAL OF MAINTENANCE FOR RSI CORP BUFFER POOL TOOL SOFTWARE	\$87,499.99	\$87,499.99	2016	10/29/2015	SS001650019		0	OTHER THAN SMALL BUSINESS
HERMAN MILLER, INC.	LAS VEGAS, NV (ODAR) SX71 DESIGN, PRODUCT AND RELOCATION SERVICES FOR SYSTEMS FURNITURE.	\$86,344.64	\$86,344.64	2015	1/6/2015	SS001530196	SS001260003	0	OTHER THAN SMALL BUSINESS
NATIONAL GRID USA SERVICE COMPANY, INC.	IGF::CT::IGF GAS UTILITY SERVICE TO THE ADDABBO BUILDING, 155-10 JAMAICA AVE, JAMAICA NY 11432 FROM 08/01/2015 TO 07/31/2016.	\$85,000.00	\$85,000.00	2015	7/27/2015	SS021530007	GS00P12BSD0879	0	OTHER THAN SMALL BUSINESS
RICHMOND, CITY OF	CONTRACTOR SHALL PROVIDE SUPERVISION, LABOR, MATERIALS, AND NECESSARY EQUIPMENT TO MAINTAIN THE SEWER AND DRAIN SYSTEMS LOCATED AT THE SOCIAL SECURITY ADMINISTRATION'S FRANK HAGEL FEDERAL BUILDING, 1221 NEVIN AVE., RICHMOND, CA 94801-3123. IGF::CT::IGF	\$84,181.08	\$84,181.08	2017	11/17/2016	SS091751003		0	OTHER THAN SMALL BUSINESS
BOWHEAD PROFESSIONAL SOLUTIONS, LLC	IGF::OT::IGF  THIS IS A ROUTINE TASK ORDER AGAINST CONTRACT SS00-14-61008 FOR OPTION YEAR II. THIS DELIVERY ORDER IS FOR IT SUPPORT SERVICES.	\$83,705.72	\$83,705.72	2015	5/8/2015	SS001530213	SS001461008	1	SMALL BUSINESS
INNOVATION DATA PROCESSING, INC.	THIS MODIFICATION IS BEING ISSUED TO RELEASE FUNDING IN THE AMOUNT OF \$83,095.00.	\$83,095.00	\$83,095.00	2015	4/20/2015	SS001550008		4	OTHER THAN SMALL BUSINESS
ACROLINX GMBH	ACROLINX PLAIN LANGUAGE EDITING SOFTWARE - 500 SUBSCRIPTION LICENSES FOR THE OFFICE OF COMMUNICATIONS.	\$82,500.00	\$82,500.00	2015	8/27/2015	SS001550269		0	OTHER THAN SMALL BUSINESS
SCHNEIDER ELECTRIC USA, INC.	IGF::CT::IGF - TECHNICAL SUPPORT, PREVENTIVE MAINTENANCE, ON-SITE MAINTENANCE, AND REMOTE DIAGNOSTIC SUPPORT FOR THE SCHNEIDER ELECTRIC POWERLOGIC MONITORING SYSTEM AT THE SOCIAL SECURITY ADMINISTRATIONS SECURITY WEST BUILDING.	\$16,483.36	\$82,416.80	2015	8/31/2015	SS001550277		0	OTHER THAN SMALL BUSINESS
KANG CHANG-WUK MD PA	DR. KANG MODIFICATION TO ADD CASES SS00-11-40086 IGF::CT::IGF	\$82,000.00	\$82,000.00	2015	1/21/2015	7	SS001140086	0	SMALL BUSINESS
JACOB TENDLER MD	DR. TENDLER MODIFICATION TO ADD CASES SS00-11-40032 IGF::CT::IGF	\$82,000.00	\$82,000.00	2015	1/13/2015	6	SS001140032	0	SMALL BUSINESS
ZUNIGA MD, LUIS M	DR. ZUNIGA MODIFICATION TO ADD CASES SS00-11-40021 IGF::OT::IGF	\$82,000.00	\$82,000.00	2015	1/13/2015	5	SS001140021	0	SMALL BUSINESS
SHI INTERNATIONAL CORP.	SONATYPE NEXUS MAINTENANCE	\$81,650.00	\$81,650.00	2016	3/29/2016	SS001650090		0	OTHER THAN SMALL BUSINESS
T.I.S. AMERICA INC.	EFLOW COMPLETION LICENSES	\$81,200.00	\$81,200.00	2015	5/14/2015	SS001550121		0	SMALL BUSINESS

Vendor Name	Description of Requirement	Action Obligation	Base and All Options Value	Fiscal Year	Date Signed	PO/Delivery Order/Task Order/Call#	Parent Contract	Mod #	Contracting Officers Business Size Selection
TIS AMERICAS, INC.	TIS EFLOW CUSTOM STATION LICENSES TO CREATE VIRTUAL COUPONS FOR THE MATPSC / REMITTANCE AND ACCOUNTING UNIT.	\$80,080.00	\$80,080.00	2016	7/20/2016	SS001650191		0	SMALL BUSINESS
NATIONAL GRID USA SERVICE COMPANY, INC.	IGF::OT::IGF GAS UTILITY SERVICE TO THE ADDABBO FEDERAL BUILDING, AT 155-10 JAMAICA AVE, JAMAICA NY 11432 PERIOD OF PERFORMANCE 08/01/2016 TO 07/31/2017.	\$80,000.00	\$80,000.00	2016	7/28/2016	SS021630004	GS00P12BSD0879	0	OTHER THAN SMALL BUSINESS
TENACITY, INC.	THE PROCUREMENT OF A NEW TEXT OVER INTERNET PROTOCOL (TOIP) COMPUTER-BASED SOLUTION	\$40,000.00	\$80,000.00	2015	6/15/2015	SS001560035		0	SMALL BUSINESS
AMERICAN SERVICE NETWORK CORPORATION	IGF::CT::IGF EEO PROGRAM CONSULTANT SERVICES FOR OCRES (DIRECT 8A AWARD)	\$79,953.75	\$79,953.75	2015	6/12/2015	SS001550172		0	SMALL BUSINESS
HERMAN MILLER, INC.	EX97 - OAKLAND (ODAR), CA - REQUISITION IS TO ORDER REMAINING DESIGN SERVICES AND NEW INSTALLATION AND PRODUCT FOR SYSTEMS FURNITURE.	\$78,865.52	\$78,865.52	2015	4/14/2015	SS001530403	SS001260003	0	OTHER THAN SMALL BUSINESS
CROSSROADS BUILDING SERVICES INCORPORATED	JANITORIAL/CUSTODIAL SERVICES FOR FRANK HAGEL FEDERAL BUILDING, RICHMOND, CALIFORNIA. FOLLOW-ON YEAR EIGHT - JULY 1, 2015 TO JUNE 30, 2016								
VXD SYSTEMS INC.	N/A PRIOR 03/01/2012	\$1,433,078.22	\$77,787.08	2015	6/22/2015	SS000760045		31	OTHER THAN SMALL BUSINESS
	TONER FOR THE PANASONIC PANAFAX MACHINES	\$77,144.90	\$77,144.90	2016	9/30/2016	SS091652004		0	SMALL BUSINESS
SECURITY DETECTION, INC.	WE SEEK TO AWARD A FIRM-FIXED-PRICE PURCHASE ORDER FOR THE PURCHASE AND INSTALLATION OF NEW L-3 X-RAY SCANNER MACHINES AT AGENCY HEADQUARTERS IN WOODLAWN, MARYLAND.	\$75,762.63	\$75,762.63	2016	9/6/2016	SS001650242		0	SMALL BUSINESS
CALDWELL MD, LARRY V	REQUEST FOR NEW CALL ORDER FOR LARRY CALDWELL FOR CASES AND NON CASE SERVICE HOURS								
	IGF::CL::IGF	\$75,060.00	\$75,060.00	2016	3/14/2016		1 SS04164C035	0	SMALL BUSINESS
PACIFIC GAS AND ELECTRIC COMPANY	FHFB UTILITIES- GAS AND ELECTRIC (8/1/14 - 7/31/15)								
	IGF::CT::IGF CRITICAL FUNCTIONS	\$75,000.00	\$75,000.00	2015	7/11/2015	SS091430001	GS00P07BSD0505	1	OTHER THAN SMALL BUSINESS
GALLAGHER BENEFIT SERVICES, INC.	IGF::OT::IGF PURCHASE ORDER FOR RENEWAL OF ELECTRONIC SUBSCRIPTION ENTITLED, GVISOR.								
	PREVIOUSLY PURCHASED UNDER SS00-12-50086.	\$25,000.00	\$75,000.00	2015	12/18/2014	SS001550050		0	OTHER THAN SMALL BUSINESS
LEAD TECHNOLOGIES, INC.	LEADTOOLS DOCUMENT IMAGING SDK VERSION 14.5 SW - ANNUAL SOFTWARE MAINTENANCE - MAINTENANCE RENEWAL ON PURCHASE ORDER SS00-15-50148	\$75,000.00	\$75,000.00	2016	6/2/2016	SS001650144		0	SMALL BUSINESS
HERMAN MILLER, INC.	SAN RAFAEL, CA #5988 - RELOCATION WITH DEMOUNTABLE WALL FOR SYSTEMS FURNITURE	\$73,566.58	\$73,566.58	2016	9/15/2016	SS001630801	SS001260003	0	OTHER THAN SMALL BUSINESS
HERMAN MILLER, INC.	EVANSVILLE, IN RX84 - DESIGN, INSTALLATION AND PRODUCT ESTIMATE FOR SYSTEMS FURNITURE.	\$71,935.30	\$71,935.30	2015	2/6/2015	SS001530255	SS001260003	0	OTHER THAN SMALL BUSINESS
RICHMOND, CITY OF	CONTRACTOR SHALL PROVIDE SUPERVISION, LABOR, MATERIAL, AND NECESSARY EQUIPMENT TO MAINTAIN THE SEWER AND DRAIN SYSTEMS LOCATED AT THE FRANK HAGEL FEDERAL BUILDING, 1221 NEVIN AVENUE, RICHMOND, CA 94801.								
	IGF::CT::IGF	\$71,021.04	\$71,021.04	2016	2/5/2016	SS091651002		0	OTHER THAN SMALL BUSINESS
BOWHEAD PROFESSIONAL SOLUTIONS, LLC	IGF::OT::IGF THE SOCIAL SECURITY ADMINISTRATION (SSA) HAS A REQUIREMENT TO FUND TECHNICAL SUPPORT SERVICES SUPPORTING AUTOMATED DATA PROCESSING CAPABILITIES AND RELOCATIONS (MOVES)AT CLAIMS-TAKING FSP SITES. TWO SITES OSLO, NORWAY AND LONDON, ENGLAND WILL RELOCATE(MOVE)FROM THEIR CURRENT LOCATION TO ANOTHER LOCATION FROM DECEMBER 2016 THROUGH APRIL 30, 2017.								
	ATTN: GREG SHANKLIN	\$70,736.98	\$70,736.98	2017	10/21/2016	SS001730013	SS001461008	0	SMALL BUSINESS
UGI PENN NATURAL GAS, INC.	IGF::OT::IGF TO PROVIDE NATURAL GAS UTILITY SERVICE FOR WBD0C	\$70,000.00	\$70,000.00	2016	7/21/2016	SS001650193		0	SMALL BUSINESS
HERMAN MILLER, INC.	CHICAGO, IL ODAR #AX26 THE OFFICE IS ADDING 7 NEW WORKSTATIONS TO ACCOMMODATE EMPLOYEES MOVING INTERNALLY. DESIGN SERVICES, INSTALLATION SERVICES AND ESTIMATED PRODUCT IS REQUIRED FOR THIS PROJECT.	\$69,278.24	\$69,278.24	2015	4/29/2015	SS001530452	SS001260003	0	OTHER THAN SMALL BUSINESS

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AMERICAN SERVICE NETWORK CORPORATION	IGF::CT::IGF EEO PROGRAM CONSULTANT SERVICES FOR OCRES (DIRECT BA AWARD)	\$68,227.20	\$68,227.20	2016	12/29/2015	SS001550172		1	SMALL BUSINESS
VIDEK INC	MAINTENANCE OF VIDEK 8600 TRACK AND TRACE SYSTEM	\$68,120.00	\$68,120.00	2016	5/12/2016	SS001650134		0	SMALL BUSINESS
PHILADELPHIA, CITY OF	AWARD FOR THE DISTRIBUTION OF NATURAL GAS FOR THE MATSSC	\$67,711.00	\$67,711.00	2015	6/17/2015	SS031530004	GS00P08BSD0546	0	OTHER THAN SMALL BUSINESS
RICHMOND, CITY OF	BUILDING SANITARY SEWER/STORM FEES	\$67,455.00	\$67,455.00	2015	1/26/2015	SS091551004		0	OTHER THAN SMALL BUSINESS
THE ARC OF BALTIMORE INCORPORATED (1428)	LANDSCAPING AND RENOVATION: TREE AND SHRUB REMOVAL, AND REDESIGNING FLOWER BEDS	\$67,294.17	\$67,294.17	2016	9/20/2016	SS000860012		51	OTHER THAN SMALL BUSINESS
NERO INC	RENEWAL ON NERO 9 SOFTWARE LICENSE MAINTENANCE	\$86,321.09	\$67,263.27	2017	11/3/2016	SS001560003		2	SMALL BUSINESS
HERMAN MILLER, INC.	ALBUQUERQUE NM ODAR #YX12 INSTALLATION OF 11 E-01 SYSTEMS FURNITURE WORKSTATIONS.	\$67,154.74	\$67,154.74	2015	5/20/2015	SS001530521	SS001260003	0	OTHER THAN SMALL BUSINESS
HENSEL PHELPS SERVICES LLC	ONYX WORKSTATION	\$66,582.00	\$66,582.00	2015	9/8/2015	SS001530816	SS001461106	0	OTHER THAN SMALL BUSINESS
KOFAX, INC.	MAINTAIN KOFAX MARKVIEW INVOICING SOFTWARE	\$66,561.80	\$66,561.80	2015	12/18/2014	SS001550048		0	SMALL BUSINESS
UGI PENN NATURAL GAS, INC.	IGF::CT::IGF DELIVERY OF GAS SERVICE TO WBD0C 1150 EAST MOUNTAIN DRIVE WILKES BARRE PA	\$66,500.00	\$66,500.00	2015	7/29/2015	SS001550223		0	OTHER THAN SMALL BUSINESS
MICROSOFT CORPORATION SITZ IN REDMOND CORPORATION	IGF::OT::IGF  MODIFICATION 1 TO TASK ORDER 18 TO CONTRACT SS00-13-60014. MICROSOFT WILL PROVIDE ENGINEERING AND CONSULTING SERVICES FOR THE OFFICE OF RETIREMENT AND DISABILITY POLICY. THE HOURS INITIALLY ORDERED WERE EXHAUSTED AND ADDITIONAL HOURS ARE BEING ORDERED TO COMPLETE THE REQUIRED TASK UNDER THE EXISTING PERIOD OF PERFORMANCE.	\$65,750.00	\$65,750.00	2015	8/20/2015	18 SS001360014		1	OTHER THAN SMALL BUSINESS
CRA INTERNATIONAL, INC.	IGF::OT::IGF MODIFICATION TO OBLIGATE ADDITIONAL FUNDING FOR EXPERT WITNESS SERVICES TO LITIGATE A CLASS ACTION BEFORE THE EEOC	\$65,245.00	\$65,245.00	2016	11/25/2015	SS001560036		4	OTHER THAN SMALL BUSINESS
HERMAN MILLER, INC.	ST GEORGE, UT RA07 DESIGN, INSTALL, ESTIMATED PRODUCT FOR OFFICE RELOCATION FOR SYSTEMS FURNITURE.	\$64,513.29	\$64,513.29	2015	3/30/2015	SS001530355	SS001260003	0	OTHER THAN SMALL BUSINESS
FEDERAL PRISON INDUSTRIES INC	SXO MID BACK CHAIR, BLACK WEB SKU: SXO6100BLK0301 ERGONOMICALLY DESIGNED BACK FRAME WITH BUILT-IN LUMBAR SUPPORT. ENERGY ABSORBING SEAT. ADJUSTABLE ARMS. UPHOLSTERED, MESH BACK. COLOR: BLACK ALL PURPOSE BACK POCKET. CASTERS 250 LB. WEIGHT LIMIT	\$63,342.96	\$63,342.96	2016	9/12/2016	SS011650009		0	OTHER THAN SMALL BUSINESS
MEADOWDALE MEDICAL CONSULTING, PLLC	MERRILL, MC, REGION 10 ADD FUNDING AND CASES IGF::CL::IGF CLOSELY ASSOCIATED	\$62,640.00	\$62,640.00	2016	2/8/2016	4 SS10154C000		0	SMALL BUSINESS
LAWRENCE SCHAFFZIN	PERIOD OF PERFORMANCE -04/01/2016 - 07/31/2016. THE CONTRACTOR SHALL COMPLETE INDEPENDENT CASE REVIEWS IN ACCORDANCE WITH THE TERMS AND CONDITIONS SET FORTH IN HIS RMC BPA. IGF::CL::IGF	\$62,640.00	\$62,640.00	2016	3/16/2016	3 SS03154C018		0	SMALL BUSINESS
NATIONAL ASSOCIATION FOR PUBLIC HEALTH STATISTICS AND INFORM	IGF::OT::IGF TASK ORDER SS00-17-30016 IS BEING ISSUED FOR THE TESTING AND TECHNICAL ASSISTANCE FOR STATES IMPLEMENTING ELECTRONIC DEATH REGISTRATION SYSTEMS.	\$62,568.00	\$62,568.00	2017	10/24/2016	SS001730016	SS001660002	0	OTHER THAN SMALL BUSINESS
GOODWILL INDUSTRIES OF THE CHESAPEAKE INCORPORATED	LOADING DOCK SERVICES - RMB BUILDING	\$62,512.06	\$62,512.06	2015	9/16/2015	SS000860004		30	OTHER THAN SMALL BUSINESS
PLURALSIGHT, LLC	IGF::OT::IGF PLURALSIGHT PLUS E-LEARNING SUBSCRIPTION	\$62,300.00	\$62,300.00	2016	7/28/2016	SS001650187		0	OTHER THAN SMALL BUSINESS



Vendor Name	Description of Requirement	Action Obligation	Base and All Options Value	Fiscal Year	Date Signed	PO/Delivery Order/Task Order/Call#	Parent Contract	Mod #	Contracting Officers Business Size Selection
ALABAMA GOODWILL INDUSTRIES, INC.	IGF::CL::IGF WAREHOUSE SERVICES AT BSSC, FOLLOW-ON YEAR 1	\$225,878.88	\$60,978.48	2016	6/30/2016	SS041461003		2	OTHER THAN SMALL BUSINESS
CRA INTERNATIONAL, INC.	IGF::OT::IGF MODIFICATION TO OBLIGATE ADDITIONAL FUNDING FOR EXPERT WITNESS SERVICES TO LITIGATE A CLASS ACTION BEFORE THE EEOC	\$59,955.00	\$59,955.00	2015	9/1/2015	SS001560036		1	OTHER THAN SMALL BUSINESS
ENOVITY, INC.	THE CONTRACTOR SHALL PROVIDE ALL SUPERVISION, LABOR, EQUIPMENT, MATERIAL, AND SUPPORT TO MONITOR THE COMPLEX MECHANICAL SYSTEMS THAT ENSURE AIR QUALITY, AND OCCUPANT COMFORT / SAFETY AT THE SOCIAL SECURITY ADMINISTRATION, RICHMOND, CALIFORNIA. IGF::CT::IGF	\$59,512.88	\$59,512.88	2016	8/26/2016	SS091651017		0	OTHER THAN SMALL BUSINESS
DATA PROCESSING TECHNIQUES INC	RENEW MAINTENANCE ON SS00-15-50122, DATA PROCESSING TECHNIQUES, INC. MAINFRAME PDS MONITOR SOFTWARE	\$59,486.00	\$59,486.00	2016	4/12/2016	SS001650101		0	SMALL BUSINESS
AROON SUANSILPPONGSE DR	DR. SUANSILPPONGSE MODIFICATION TO ADD CASES SS00-11-40032 IGF::CT::IGF	\$57,400.00	\$57,400.00	2015	1/13/2015	5	SS001140034	0	SMALL BUSINESS
IRON DATA SOLUTIONS, INC. (DE)	IGF::OT::IGF IDIQ CONTRACT SS00-11-60059(IRON DATA SOLUTIONS, INC.) TASK ORDER 0080: MICROSOFT OFFICE 2013 COMPATIBILITY TESTING FOR IMPLEMENTATION TO 47 SITES.	\$57,251.00	\$57,251.00	2016	11/12/2015	80	SS001160059	0	OTHER THAN SMALL BUSINESS
PUBLIC HEALTH, IOWA DEPARTMENT OF	NON-ELECTRONIC DEATH REGISTRATION - IOWA THE PURPOSE OF MODIFICATION NUMBER 4 IS TO EXERCISE OPTION YEAR THREE TO EXTEND THE TERM OF THE CONTRACT FROM JANUARY 1, 2015 THROUGH DECEMBER 31, 2015 FOR RECEIPT OF ELECTRONIC DEATH RECORDS.	\$0.00	\$57,195.00	2015	12/22/2014	SS001260041		4	OTHER THAN SMALL BUSINESS
WOLTERS KLUWER FINANCIAL SERVICES, INC.	RENEWAL OF MAINTENANCE ON 150 TEAMMATE AUDIT MANAGEMENT SYSTEM SOFTWARE LICENSES FOR THE PERIOD OF PERFORMANCE FROM JULY 1, 2016 THROUGH JUNE 30, 2017 FOR THE OFFICE OF THE INSPECTOR GENERAL.	\$57,105.00	\$57,105.00	2016	6/7/2016	SS001650021		0	OTHER THAN SMALL BUSINESS
HERMAN MILLER, INC.	ST GEORGE, UT RA07 DESIGN, INSTALL, ESTIMATED PRODUCT FOR OFFICE RELOCATION FOR SYSTEMS FURNITURE.	\$56,476.68	\$56,476.68	2015	7/28/2015	SS001530355	SS001260003	1	OTHER THAN SMALL BUSINESS
AMERICAN PSYCHIATRIC ASSOCIATION	PSYCHIATRY ONLINE DSM-5 RENEWAL	\$54,918.00	\$54,918.00	2016	12/29/2015	SS001650029		0	OTHER THAN SMALL BUSINESS
STANLEY CONVERGENT SECURITY SOLUTIONS, INC.	IDS MAINTENANCEFOR 6 MONTHS FOR SSA OFFICES IN REGION I AND II. IGF::OT::IGF	\$54,426.00	\$54,426.00	2016	2/18/2016	SS021650003		0	OTHER THAN SMALL BUSINESS
WOLTERS KLUWER FINANCIAL SERVICES, INC.	RENEWAL OF MAINTENANCE ON 150 TEAMMATE AUDIT MANAGEMENT SYSTEM SOFTWARE LICENSES SS00-15-50090 FOR THE PERIOD OF PERFORMANCE FROM JULY 1, 2015 THROUGH JUNE 30, 2016.	\$54,390.00	\$54,390.00	2015	6/9/2015	SS001550162		0	OTHER THAN SMALL BUSINESS
DATA PROCESSING TECHNIQUES INC	RENEW MAINTENANCE ON SS00-13-50095 PDS MONITOR SOFTWARE	\$53,000.00	\$53,000.00	2015	4/21/2015	SS001550122		0	SMALL BUSINESS
CHICAGO SOFT, LTD.	RENEWAL OF SS00-14-51117 CHICAGO SOFT LTD. MVS/QUICK-REF SOFTWARE MAINTENANCE.	\$52,822.00	\$52,822.00	2015	4/28/2015	SS001550129		0	SMALL BUSINESS
AMERICAN PSYCHIATRIC ASSOCIATION	PSYCHIATRY ONLINE PREMIUM SUBSCRIPTION RENEWAL	\$52,806.00	\$52,806.00	2015	12/18/2014	SS001550044		0	OTHER THAN SMALL BUSINESS
WOLTERS KLUWER FINANCIAL SERVICES, INC.	THIS REQUISITION WILL PROVIDE THE OFFICE OF AUDIT WITH AUDIT MANAGEMENT SOFTWARE.	\$51,818.00	\$51,818.00	2015	3/17/2015	SS001550090		0	OTHER THAN SMALL BUSINESS
HPI/GSA - 2B, L.P.	IGF::OT::IGF DAYTIME CLEANING SERVICES FOR THE DALLAS REGIONAL OFFICE IN DALLAS, TEXAS	\$51,682.20	\$51,682.20	2016	2/25/2016	SS061650001		0	OTHER THAN SMALL BUSINESS
ASSOCIATION FOR COMPUTING MACHINERY, INC.	ACCESS TO THE ASSOCIATION COMPUTING MACHINERY (ACM) DIGITAL LIBRARY	\$16,824.00	\$51,486.11	2016	5/10/2016	SS001650127		0	OTHER THAN SMALL BUSINESS
NOETIX CORPORATION	NOETIX FINANCIAL - SS00-16-50001	\$51,269.24	\$51,269.24	2017	10/5/2016	SS001750010		0	SMALL BUSINESS
NOETIX CORPORATION	RENEWAL OF SS00-15-50013 ON MAINTENANCE OF NOETIX TECHNOLOGIES SOFTWARE	\$51,269.24	\$51,269.24	2016	10/8/2015	SS001650001		0	OTHER THAN SMALL BUSINESS
DREAM MANAGEMENT, INC.	IGF::OT::IGF SS00-12-60085 EQUITABLE ADJUSTMENT	\$51,000.00	\$51,000.00	2015	9/17/2015	SS001260085		8	SMALL BUSINESS

Vendor Name	Description of Requirement	Action Obligation	Base and All Options Value	Fiscal Year	Date Signed	PO/Delivery Order/Task Order/Call#	Parent Contract	Mod #	Contracting Officers Business Size Selection
SABREE, INC.	IGF::OT::IGF  REMOVAL OF EXISTING CARPET TILE, VINYL ASBESTOS FLOOR TILE (VAT) AND ASSOCIATED MASTIC IN ROOM GD-7 WEST HIGH RISE BUILDING.	\$50,933.68	\$50,933.68	2016	9/9/2016	SS001630701	SS001461113	0	SMALL BUSINESS
ROCK CREEK PUBLISHING GROUP	IGF::CT::IGF  CONTRACT SS00-10-60086 TASK ORDER 0014 - SSA WEBSITE HOSTING SERVICES	\$50,906.72	\$50,906.72	2015	8/8/2015	14	SS001060086	0	SMALL BUSINESS
SABREE, INC.	IGF::OT::IGF  MODIFICATION TO RENEGOTIATE CONTRACT CLINS RATES FOR ASBESTOS RENOVATION AND REMOVAL SERVICES AT THE SOCIAL SECURITY ADMINISTRATION HEADQUARTERS BUILDINGS AND OUTLYING BUILDINGS LOCATED IN BALTIMORE, MD.	\$0.00	\$50,775.28	2016	9/6/2016	SS001461113		5	SMALL BUSINESS
ULINE, INC.	N/A SUPPLIES - PURCHASE ORDER SS00-15-50237 WITH ULINE, INC. FOR SHELVING AND STORAGE RELATED ITEMS.	\$50,308.73	\$50,308.73	2015	8/8/2015	SS001550237		0	OTHER THAN SMALL BUSINESS
THOMAS S ROWE MD	REQUEST FOR NEW CALL ORDER FOR CASES FOR T. ROWE IGF::CL::IGF	\$50,040.00	\$50,040.00	2016	3/23/2016	1	SS04164C047	0	SMALL BUSINESS
PACIFIC GAS AND ELECTRIC COMPANY	FHFB UTILITIES- GAS AND ELECTRIC (8/1/14 - 7/31/15) IGF::CT::IGF CRITICAL FUNCTIONS	\$50,000.00	\$50,000.00	2015	9/22/2015	SS091430001	GS00P07BSD0505	2	OTHER THAN SMALL BUSINESS
PHILADELPHIA, CITY OF	THE PURPOSE OF THIS ACQUISITION IS TO ISSUE A DELIVERY ORDER AGAINST THE GSA GWAC CONTRACT FOR THE DISTRIBUTION OF NATURAL GAS PROVIDED BY DIRECT ENERGY TO THE SSA, MATSSC LOCATED AT 300 SPRING GARDEN STREET, PHILADELPHIA, PA 19123. IGF::OT::IGF	\$50,000.00	\$50,000.00	2016	6/22/2016	SS031630007	GS00P08BSD0546	0	OTHER THAN SMALL BUSINESS
EDAC SYSTEMS, INC.	THE OFFICE OF TELECOMMUNICATIONS AND SYSTEMS OPERATIONS REQUEST IBM DATACAP/EDAC DOCUSENSE FORMS.	\$49,752.28	\$49,752.28	2015	4/8/2015	SS001550107		0	SMALL BUSINESS
YAPONDJIAN-ALVARADO, MARIA	REGION V MEDICAL CONSULTANT SERVICES FOR THE SOCIAL SECURITY ADMINISTRATION. REVIEWS BY MEDICAL CONSULTANT OF DISABILITY CLAIM CASE FILES FOR AGENCY DISABILITY PROGRAM.. THIS IS TO FUND A NEW CALL ORDER FOR INDEPENDENT CASE REVIEWS AGAINST SS05-15-4C004, CALL ORDER 2, DR MARIA YAPONDJIAN-ALVARADO. IGF::CL::IGF	\$49,269.60	\$49,269.60	2016	6/29/2016	2	SS05154C004	0	SMALL BUSINESS
STANLEY CONVERGENT SECURITY SOLUTIONS, INC.	IDS MAINTENANCE FOR 6 MONTHS FOR SSA OFFICES IN REGION I AND II. IGF::OT::IGF	\$49,026.00	\$49,026.00	2016	8/5/2016	SS021650003		1	OTHER THAN SMALL BUSINESS
SABREE, INC.	IGF::OT::IGF ASBESTOS ABATEMENT - 1ST, 2ND, 3RD FLOOR LINKS BETWEEN WHR AND ALT BUILDINGS	\$48,202.40	\$48,202.40	2016	9/14/2016	SS001630750	SS001461113	0	SMALL BUSINESS
CHICAGO SOFT, LTD.	CHICAGO SOFTWARE MVS/QUICK-REF SOFTWARE 180 DAY LICENSE LEASE AND MAINTENANCE FOR NATIONAL SUPPORT CENTER (NSC) TRANSITION	\$48,000.00	\$48,000.00	2015	2/23/2015	SS001550081		0	SMALL BUSINESS
INTERNET SYSTEMS CONSORTIUM, INC.	INTERNET SYSTEMS CONSORTIUM BIND (BERKELEY INTERNET NAME DOMAIN) SOFTWARE	\$48,000.00	\$48,000.00	2015	3/16/2015	SS001550087		0	OTHER THAN SMALL BUSINESS
AROON SUANSILPPONGSE DR	PERIOD OF PERFORMANCE- 04/01/2016 TO 07/31/2016. THE CONTRACTOR SHALL COMPLETE INDEPENDENT CASE REVIEWS IN ACCORDANCE WITH TERMS AND CONDITIONS SET FORTH IN THE RMC BPA. IGF::CL::IGF	\$47,556.00	\$47,556.00	2016	3/17/2016	2	SS03154C017	0	SMALL BUSINESS
THE AXON GROUP	PERIOD OF PERFORMANCE- 4/1/2016-7/31/2016 THE CONTRACTOR SHALL COMPLETE INDEPENDENT CASE REVIEWS IN ACCORDANCE WITH THE TERMS AND CONDITIONS SET FORTH IN HIS RMC BPA IGF::CL::IGF	\$47,046.00	\$47,046.00	2016	3/16/2016	3	SS03154C020	0	SMALL BUSINESS
SNOWBOUND SOFTWARE CORPORATION	RENEWAL OF SS00-16-50024 FOR MAINTENANCE ON SNOWBOUND RASTERMASTER	\$46,839.58	\$46,839.58	2017	11/30/2016	SS001750028		0	SMALL BUSINESS
SNOWBOUND SOFTWARE CORPORATION	SNOWBOUND SOFTWARE MAINTENANCE RENEWAL	\$46,839.58	\$46,839.58	2016	11/30/2015	SS001650024		0	SMALL BUSINESS

Vendor Name	Description of Requirement	Action Obligation	Base and All Options Value	Fiscal Year	Date Signed	PO/Delivery Order/Task Order/Call#	Parent Contract	Mod #	Contracting Officers Business Size Selection
OPEX CORPORATION	THE PURPOSE OF THIS AWARD IS TO PROVIDE PREVENTATIVE MAINTENANCE AND REPAIR ON TWO (2) OPEX MODEL PS51 RAPID EXTRACTION DESKS (SERIAL # 12719, 15138) AND ONE (1) OMATION 306 LETTER OPENER (SERIAL #ZE1045) FOR 1 BASE YEAR AND 4 OPTION YEARS.IGF::OT::IGF								
	PERIOD OF PERFORMANCE:	\$8,496.44	\$46,776.68	2016	7/5/2016	SS031650007			0 SMALL BUSINESS
HPI/GSA - 2B, L.P.	IGF::OT::IGF DAYTIME CLEANING SERVICES	\$46,446.45	\$46,446.45	2015	3/20/2015	SS061550002			0 SMALL BUSINESS
SOFTWARE AG GOVERNMENT SOLUTIONS INC.	RENEWAL AND CO-TERMINATION OF SS00-15-30015 AND SS00-14 31915 FOR MAINTENANCE ON TERRACOTTA SOFTWARE.	\$46,290.86	\$46,290.86	2015	8/27/2015	SS001550256			0 OTHER THAN SMALL BUSINESS
JOHNSON CONTROLS, INC.	METASYS AUTOMATIC REDUNDANCY SOFTWARE, INSTALLATION SERVICES, AND SERVERS UPGRADE IGF::OT::IGF	\$46,192.36	\$46,192.36	2015	9/20/2015	SS001550306			0 OTHER THAN SMALL BUSINESS
SABREE, INC.	IGF::OT::IGF ASBESTOS ABATEMENT FOR SSA WEST HIGH RISE BUILDING, ROOM G-150 AND HALLWAY	\$45,665.97	\$45,665.97	2016	9/9/2016	SS001630688	SS001461113		0 SMALL BUSINESS
LOCUM, INC.	IGF::CT::IGF CLOSELY ASSOCIATED - MEDICAL CONSULTANT SERVICES FOR REGION 8 FOR THE SOCIAL SECURITY ADMINISTRATION. REVIEWS BY MEDICAL CONSULTANT OF DISABILITY CLAIM CASE FILES FOR AGENCY DISABILITY PROGRAM. SPECIALTY - PSYCHOLOGIST	\$45,600.00	\$45,600.00	2016	5/24/2016		3 SS08154C003		0 SMALL BUSINESS
HORTON MECHANICAL CONTRACTORS, INC.	IGF::CT::IGF ALTMAYER BOILERS #1-4 REPAIRS, CALIBRATION&TESTING	\$45,500.00	\$45,500.00	2016	1/15/2016	SS001650057			0 SMALL BUSINESS
OPEX CORPORATION	RENEW MAINTENANCE FOR OPEX MPS 40 MAILROOM EQUIPMENT. IGF::CT::IGF	\$44,392.50	\$44,392.50	2016	3/3/2016	SS001650072			0 SMALL BUSINESS
R S I CORP	RENEWAL OF MAINTENANCE FOR RSI CORP BUFFER POOL TOOL SOFTWARE	\$0.00	\$43,750.00	2016	1/28/2016	SS001650019			1 OTHER THAN SMALL BUSINESS
ACCELLOS, INC.	ACCELLOS RADIO BEACON	\$43,121.53	\$43,121.53	2016	2/22/2016	SS001650071			0 OTHER THAN SMALL BUSINESS
SHI INTERNATIONAL CORP.	JPDFPROCESS IS A JAVA LIBRARY TO CREATE AND MANIPULATE WITH PDF DOCUMENTS THAT CAN BE USED TO DELIVER CUSTOMIZED PDF CONTENT TO YOUR USERS OR TO PROCESS INCOMING PDF CONTENT.	\$43,014.43	\$43,014.43	2015	5/27/2015	SS001550150			0 OTHER THAN SMALL BUSINESS
DEREK J. O'BRIEN, M.D., P.C.	REQUEST FOR NEW CALL ORDER FOR D. O'BRIEN IGF::CL::IGF	\$41,700.00	\$41,700.00	2016	3/23/2016		1 SS04164C005		0 SMALL BUSINESS
YORK TELECOM CORPORATION	IGF::OT::IGF OTHER FUNCTIONS VARIOUS COMPONENTS OF HARDWARE AND INSTALLATION FOR A NINE-SCREEN VIDEO WALL.	\$41,541.69	\$41,541.69	2015	9/28/2015	SS001550317			0 SMALL BUSINESS
CARRIER CORPORATION	TO BUY CRITICAL SPARE PARTS FOR THE CHILLERS AT THE NATIONAL SUPPORT CENTER.	\$41,277.17	\$41,277.17	2015	6/24/2015	SS001550174			0 OTHER THAN SMALL BUSINESS
HERMAN MILLER, INC.	SAN JUAN, PR #Z271 - FIELD OFFICE EXPERIENCED A SMALL FIRE THAT CAUSED DAMAGED TO FOUR WORKSTATIONS THAT NEED TO BE REPLACE DUE TO WATER AND SMOKE.	\$41,222.16	\$41,222.16	2016	9/12/2016	SS001630770	SS001260003		0 OTHER THAN SMALL BUSINESS
ACCELLOS, INC.	CONTINUED MAINTENANCE OF ACCELLOS RADIO BEACON SOFTWARE	\$41,068.13	\$41,068.13	2015	3/16/2015	SS001550083			0 SMALL BUSINESS
PHILIP D WALLS MD	DR. WALLS MODIFICATION TO ADD CASES SS00-11-40024 IGF::CT::IGF	\$41,000.00	\$41,000.00	2015	1/21/2015		6 SS001140024		0 SMALL BUSINESS
NUANCE COMMUNICATIONS, INC.	NUANCE PURCHASE FOR DMA EXERCISING OPTION YEAR 2	\$40,800.00	\$40,800.00	2015	1/12/2015	SS001350078			2 SMALL BUSINESS
HERMAN MILLER, INC.	TUCSON,AZ XA908 - DESIGN, INSTALLATION AND PRODUCT ESTIMATE FOR SYSTEMS FURNITURE	\$40,105.40	\$40,105.40	2015	5/14/2015	SS001530505	SS001260003		0 OTHER THAN SMALL BUSINESS
PENNSYLVANIA - AMERICAN WATER COMPANY	IGF::OT::IGF PROVIDE WATER UTILITY SERVICE FOR WBDOC 1150 EAST MOUNTAIN DRIVE WILKES-BARRE, PA 18702	\$40,000.00	\$40,000.00	2015	7/15/2015	SS001550211			0 OTHER THAN SMALL BUSINESS
PENNSYLVANIA - AMERICAN WATER COMPANY	IGF::OT::IGF TO PROVIDE PUBLIC WATER UTILITY SERVICE FOR WBDOC	\$40,000.00	\$40,000.00	2016	7/21/2016	SS001650192			0 OTHER THAN SMALL BUSINESS
WEISBERG, ROBERT A MD	PERIOD OF PERFORMANCE- 04/01/2016 - 07/31/2016. THE CONTRACTOR SHALL COMPLETE INDEPENDENT CASE REVIEWS IN ACCORDANCE WITH THE TERMS AND CONDITIONS SET FORTH IN THE BPA. IGF::CL::IGF	\$40,000.00	\$40,000.00	2016	3/17/2016		2 SS03154C007		0 SMALL BUSINESS

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HELP/SYSTEMS, LLC	HELPSYSTEMS BYTWARE STANDGUARD ANTIVIRUS	\$38,865.00	\$38,865.00	2015	3/9/2015	SS001550075		0	SMALL BUSINESS
DLT SOLUTIONS INCORPORATED	DELL DATABASE/VIRTUALIZATION (TOAD) - MAINTENANCE RENEWAL	\$12,943.50	\$38,830.50	2016	5/4/2016	SS001630328	W91QUZ06A0004	0	SMALL BUSINESS
TONE SOFTWARE INC	RENEWAL OF SS00-15-50134 FOR MAINTENANCE ON TONE SOFTWARE	\$38,001.00	\$38,001.00	2016	5/3/2016	SS001650116		0	SMALL BUSINESS
PATTERSON POPE, INC.	IGF::CT::IGF STANDARD MAINTENANCE FOR LEKTRIEVERS	\$7,420.00	\$37,668.00	2016	2/9/2016	SS041650004		0	OTHER THAN SMALL BUSINESS
CORPORATE EXECUTIVE BOARD COMPANY, THE	MEMBERSHIP RENEWAL TO CORPORATE EXECUTIVE BOARD - LEARNING AND DEVELOPMENT LEADERSHIP COUNCIL. 10/1/15-9/30/16	\$37,498.00	\$37,498.00	2015	8/20/2015	SS001550253		0	SMALL BUSINESS
ACCUSOFT CORPORATION	RENEWAL OF SS00-15-50159 FOR MAINTENANCE ON ACCUSOFT BARCODE, SCANFIX AND IMAGEGEAR SOFTWARE.	\$37,087.78	\$37,087.78	2016	5/13/2016	SS001650132		0	SMALL BUSINESS
NEOPOST USA INC.	THE PURPOSE OF THIS CONTRACT IS TO FUND METER RENTALS FOR ALL NEOPOST AND HASLER MAIL METERS CURRENTLY LEASED BY OUR AGENCY. THE AGENCY PAYS THE METER RENTAL EXPENSES INCURRED BY DISABILITY DETERMINATION SERVICES (DDS) OFFICES AND PRINTING CONTRACTORS (RETAINED BY THE AGENCY TO PRINT WORKLOADS) WHO USE NEOPOST USA INC. METERS.	\$7,350.24	\$36,751.20	2015	12/29/2014	SS001550057		0	OTHER THAN SMALL BUSINESS
WORKFORCE DEVELOPMENT, IOWA	SSA AND THE IOWA WORKFORCE DEVELOPMENT HAVE ENTERED INTO AGREEMENTS TO ELECTRONICALLY ACCESS STATE WAGE/UNEMPLOYMENT AND WORKERS COMP RECORDS. WE ARE REQUESTING A BASE YEAR AND FOUR ONE-YEAR OPTIONS. THIS IS A SOLE SOURCE REQUIREMENT FOR IOWA WORKFORCE DEVELOPMENT (SEE ATTACHED SSJ). IGF::OT::IGF	\$7,200.00	\$36,000.00	2016	6/17/2016	SS071650007		0	OTHER THAN SMALL BUSINESS
FEDERAL PRISON INDUSTRIES INC	THIS IS A REQUEST FOR THE EXECUTIVE OFFICE FURNITURE FOR THE NEWLY ESTABLISHED FALLS CHURCH SATELLITE NHC OFFICE.	\$35,424.00	\$35,424.00	2016	8/1/2016	SS001650203		0	OTHER THAN SMALL BUSINESS
COMPUTER MANAGEMENT SCIENCES INC	MAINTAIN COMPUTER MANAGEMENT SCIENCES CPXPRT SOFTWARE	\$35,000.00	\$35,000.00	2016	10/6/2015	SS001651006		0	OTHER THAN SMALL BUSINESS
CHICAGO SOFT, LTD.	OLD ORDER SS00-15-50081 RENEWAL OF CHICAGO SOFT LTD. MVS/QUICK REF SOFTWARE MAINTENANCE AND UPGRADE.	\$34,893.00	\$34,893.00	2015	9/8/2015	SS001550284		0	SMALL BUSINESS
SOFTMART GOVERNMENT SERVICES, INC	JREBEL IS A PLUGIN TO RATIONAL APPLICATION DEVELOPER (RAD) / WEBSHERE APPLICATION SERVER (WAS) IN THE LOCAL WORKSTATION ENVIRONMENT. IT IS ESSENTIAL FOR THE OFFICE OF SYSTEMS BECAUSE IT SAVES THE DEVELOPERS TIME WHEN MAKING AND DEPLOYING CHANGES FOR MAJOR APPLICATIONS.	\$34,859.00	\$34,859.00	2015	7/30/2015	SS001550231		0	SMALL BUSINESS
ACCUSOFT CORPORATION	THE OFFICE OF TELECOMMUNICATIONS AND SYSTEMS OPERATIONS REQUEST ACCUSOFT PEGASUS PRIORITY SUPPORT, BARCODE, SCANFIX XPRESS (INCLUDES BARCODE XPRESS, SCANFIX, ISIS AND PDF)AND IMAGEGEAR OCR .NET	\$34,784.82	\$34,784.82	2015	6/8/2015	SS001550159		0	SMALL BUSINESS
HERMAN MILLER, INC.	BLUEFIELD WV #G311 DESIGN, INSTALLATION SERVICES AND PRODUCT FOR SYSTEMS FURNITURE	\$34,207.05	\$34,207.05	2015	7/16/2015	SS001530737	SS001260003	0	OTHER THAN SMALL BUSINESS
CHRISTOS S DAGADAKIS MD	IGF::CT::IGF TO FUND INDEPENDENT CASE REVIEWS AGAINST BPA SS10-15-4C003, DAGADAKIS, MC, REG. 10	\$34,176.00	\$34,176.00	2015	3/20/2015		1 SS10154C003	0	SMALL BUSINESS
HERMAN MILLER, INC.	HARTFORD (ODAR), CT #AX68 DESIGN, PRODUCT AND INSTALLATION SERVICES FOR SYSTEMS FURNITURE	\$33,594.65	\$33,594.65	2015	8/6/2015	SS001530825	SS001260003	0	OTHER THAN SMALL BUSINESS
IRON DATA SOLUTIONS, INC. (DE)	IGF::OT::IGF IDIQ CONTRACT SS00-11-60059(IRON DATA SOLUTIONS, INC.)-- TASK ORDER 0072: IRON DATA RETURNED CLAIMS WITH MODIFIED DETERMINATION PROJECT, ST. LOUIS DISABILITY PROCESSING UNITS SAMPLING PROJECT.	\$33,046.00	\$33,046.00	2015	2/12/2015		72 SS001160059	0	OTHER THAN SMALL BUSINESS
HERMAN MILLER, INC.	GLEN BURNIE, MD DO X283 REQUIRES FIVE (5) ADDITIONAL INTERVIEWING WORKSTATIONS FOR SYSTEMS FURNITURE	\$32,959.70	\$32,959.70	2016	5/2/2016	SS001630352	SS001260003	0	OTHER THAN SMALL BUSINESS
MARY MCLARNON MD	THIS IS A MODIFICATION TO ADD INDEPENDENT CASE REVIEWS TO THE EXISTING CALL ORDER #0011. DUE TO ADDITIONAL WORKLOAD, IT IS NECESSARY TO INCREASE EXISTING CALL ORDER FOR THIS RMC. THE REGION II RMC EVALUATES MEDICAL EVIDENCE FOR TITLE II AND TITLE XVI DISABILITY CLAIMS. REVIEWS. IGF::CL::IGF	\$32,648.00	\$32,648.00	2015	9/21/2015		11 SS021140095	2	SMALL BUSINESS

Vendor Name	Description of Requirement	Action Obligation	Base and All Options Value	Fiscal Year	Date Signed	PO/Delivery Order/Task Order/Call#	Parent Contract	Mod #	Contracting Officers Business Size Selection
INNOVATION DATA PROCESSING, INC.	THE PURCHASE OF ADDITIONAL MSU'S TO SUPPORT THE SEPTEMBER 19, 2015 AND THE OCTOBER 3, 2015 HARDWARE MAINFRAME UPGRADES DUE TO THE NSC TRANSITION.	\$32,006.40	\$32,006.40	2015	8/25/2015	SS001550008		6	OTHER THAN SMALL BUSINESS
NETEC INTERNATIONAL INC	CUSTOMER INFORMATION CONTROL SYSTEM (CICS) FILE ALLOCATION TOOL SOFTWARE KNOWN AS CICS APPLICATION FILE CONTROL SYSTEM (CAFC) MANUFACTURED BY NETEC INTERNATIONAL, INC.	\$32,000.00	\$32,000.00	2015	7/30/2015	SS001550239		0	SMALL BUSINESS
WILLIAM BACKLUND MD	NEW CALL ORDER TO ADD CASES FOR DR. BACKLUND IGF::CL::IGF CLOSELY ASSOCIATED	\$31,875.00	\$31,875.00	2017	10/25/2016		4 SS10154C004	0	SMALL BUSINESS
TONE SOFTWARE INC	MAINTENANCE ON DYNA-STEP CPU LICENSE FOR 12 MONTHS	\$31,089.00	\$31,089.00	2015	5/19/2015	SS001550134		0	OTHER THAN SMALL BUSINESS
HERMAN MILLER, INC.	JACKSONVILLE, FL IX41 PRODUCT AND INSTALLATION FOR SYSTEMS FURNITURE	\$30,969.06	\$30,969.06	2015	7/22/2015	SS001530759	SS001260003	0	OTHER THAN SMALL BUSINESS
DLT SOLUTIONS INCORPORATED	IGF::CT::IGF THIS IS FOR THE PURCHASE OF 100 LICENSES OF DELL TOAD DATA POINT PROFESSIONAL. THESE ARE ESSENTIAL FOR THE OFFICE OF SYSTEMS TO IMPLEMENT DATABASE MANAGEMENT AND ANALYSIS.	\$30,769.00	\$30,769.00	2016	9/23/2016	SS001630815	W91QUZ06A0004	0	SMALL BUSINESS
INTERIOR RESOURCE GROUP INC	FURNITURE FOR THE SEATTLE WASHINGTON OFFICE	\$30,524.97	\$30,524.97	2016	9/29/2016	SS101650005		0	SMALL BUSINESS
HERMAN MILLER, INC.	LUMBERTON, NC B338 DESIGN, INSTALLATION AND PRODUCT FOR SYSTEMS FURNITURE.	\$30,519.34	\$30,519.34	2015	12/15/2014	SS001431713	SS001260003	1	OTHER THAN SMALL BUSINESS
ADMIRAL ELEVATOR COMPANY, INC.	IGF::OT::IGF  TASK ORDER #44 SS00-15-30660  REMOVE WORN AND FRAYED ROLLED CARPET AND REPLACE WITH CARPET TILES.	\$30,479.42	\$30,479.42	2015	7/9/2015	SS001530660	SS001060042	0	SMALL BUSINESS
PHOENIX SOFTWARE INTERNATIONAL, INC.	PHOENIX INTERNATIONAL SOFTWARE, INC. - ADDITIONAL LICENSE UPGRADE AND MAINTENANCE FEES DUE TO AN UPGRADE TO SYSTEM 81.	\$30,430.86	\$30,430.86	2015	12/9/2014	SS001060048		18	SMALL BUSINESS
SZS CONSULTING LTD	IGF::OT::IGF OTHER FUNCTION  MAINFRAME SOFTWARE CONSULTING TO ASSIST SSA IN OBTAINING THE BEST VALUE WHEN EXCERCISING OPTION YEAR 1 OF THE IBM MAINFRAME SOFTWARE TASK ORDER SS00-15-30081.	\$30,000.00	\$30,000.00	2015	9/28/2015	SS001550316		0	OTHER THAN SMALL BUSINESS
AROON SUANSILPPONGSE DR	DR. SUANSILPPONGSE MODIFICATION TO ADD CASES SS00-11-40032  IGF::CT::IGF	\$29,520.00	\$29,520.00	2015	4/27/2015		5 SS001140034	1	SMALL BUSINESS
INTEGRATED SECURITY TECHNOLOGIES, INC.	HIGF::CT::IGF ID PIVCLASS MAINTENANCE SERVICE AND SUPPORT AGREEMENT FOR THE NATIONAL SUPPORT CENTER	\$29,474.50	\$29,474.50	2016	9/28/2016	SS001650266		0	SMALL BUSINESS
CHRISTOS S DAGADAKIS MD	DR. DAGADAKIS - REGION 10 ADD FUNDING AND CASE IGF::CL::IGF CLOSELY ASSOCIATED	\$29,440.00	\$29,440.00	2016	2/9/2016		2 SS10154C003	0	SMALL BUSINESS
JAMES R BUSKIRK MD	DR. BUSKIRK, BPA SS10-15-4C005 IGF::CL::IGF ADDITION OF INDEPENDENT CASE REVIEWS	\$29,410.00	\$29,410.00	2016	12/29/2015		2 SS10154C005	0	SMALL BUSINESS

Vendor Name	Description of Requirement	Action Obligation	Base and All Options Value	Fiscal Year	Date Signed	PO/Delivery Order/Task Order/Call#	Parent Contract	Mod #	Contracting Officers Business Size Selection
ECOMMERCE INTELLIGENCE CORPORATION	SSA HAS CONTRACT SS00-12-60095 WITH E-NOR TO PROVIDE GOOGLE ANALYTICS. THE AGENCY USES GOOGLE ANALYTICS FOR REPORTING ON PUBLIC WEB ACTIVITY TO SSA CONTROLLED WEBSITES. AS OF MAY 2016, GOOGLE ANALYTICS CLASSIC IS NO LONGER SUPPORTED BY GOOGLE. THIS MEANS GOOGLE WILL NO LONGER BE PROVIDING SYSTEM PATCHES, UPDATES TO CODING, OR TROUBLESHOOTING SYSTEM ERRORS. THERE IS AN IMMEDIATE NEED TO MIGRATE TO UNIVERSAL ANALYTICS TO UPGRADE OUR SYSTEM AND CONTINUE SUPPORT.  OCOMM NEEDS THE CONTRACTOR, E-NOR, TO PROVIDE THE SERVICES TO COMPLETE THE MIGRATION FROM GOOGLE ANALYTICS CLASSIC TO ANALYTICS 360 UNIVERSAL. THIS INCLUDES REPLACES OLDER DOMAIN SCRIPTS WITH ANALYTICS.JS SCRIPTS. AS PART OF THIS MIGRATION, GOOGLE TAG MANAGER AND AUDIENCE CENTER 360 SHALL BE INCLUDED. OCOMM ALSO REQUIRES THE CONTRACTOR TO CREATE A SCRIPT THAT WILL RUN ON THE SSA HOMEPAGE TO AUTOMATICALLY DETECT WHEN USERS CLICK ON A TILE.  A STATEMENT OF WORK IS INCLUDED IN THIS REQUISITION THAT OUTLINES THE ISSUE, THE SCOPE OF WORK INCLUDING THE MIGRATION SERVICES, TAG MANAGER SERVICES, AND THE DELIVERABLES, A PROJECT TIMELINE, AND PRICE QUOTE.	\$29,185.00	\$29,185.00	2016	9/30/2016	SS001650274		0	OTHER THAN SMALL BUSINESS
TETON DATA SYSTEMS INC	STATIREF MEDICAL TEXTBOOKS ONLINE - MODIFICATION TO FUND ONE MONTH.	\$29,166.67	\$29,166.67	2015	12/29/2014	SS001050174		12	SMALL BUSINESS
TETON DATA SYSTEMS INC	STATIREF MEDICAL TEXTBOOKS ONLINE - MODIFICATION TO FUND ONE MONTH.	\$29,166.67	\$29,166.67	2015	1/22/2015	SS001050174		13	SMALL BUSINESS
HERMAN MILLER, INC.	GERMANTOWN, PA B218 - DESIGN, INSTALLATION AND PRODUCT FOR SYSTEMS FURNITURE	\$29,052.34	\$29,052.34	2015	3/19/2015	SS001530326	SS001260003	0	OTHER THAN SMALL BUSINESS
SABREE, INC.	IGF::OT::IGF ADD ADDITIONAL CLINS FOR CARPET TILE REMOVAL ONLY  ASBESTOS REMEDIATION AND REMOVAL SERVICE FIRM-FIXED PRICE (IDIQ) CONTRACT AT THE SOCIAL SECURITY ADMINISTRATION'S HEADQUARTERS BUILDINGS AND OUTLYING BUILDINGS LOCATED IN BALTIMORE, MARYLAND	\$0.00	\$28,872.00	2015	12/15/2014	SS001461113		1	SMALL BUSINESS
EAST BAY MUNICIPL UTILTY DISTR	FHFB UTILITIES - WATER (PP = 11/1/16-10/31/17). TO PROVIDE WATER SERVICES FOR THE BUILDING, DRINKING FOUNTAINS AND FIRE SUPPRESSION AT THE FRANK HAGEL FEDERAL BUILDING. SOLE SOURCE CONTRACT.  IGF::CT::IGF	\$28,380.00	\$28,380.00	2017	10/18/2016	SS091751001		0	OTHER THAN SMALL BUSINESS
HERMAN MILLER, INC.	OWINGS MILLS, MD #197 - RECONFIGURE TWO (2) X3-01 WORKSTATIONS #28 AND #29 TO A MA-95 AND ONE (1) NEW MA-95 FOR SYSTEMS FURNITURE.	\$28,369.62	\$28,369.62	2016	8/3/2016	SS001630619	SS001260003	0	OTHER THAN SMALL BUSINESS
HERMAN MILLER, INC.	TO RECONFIGURED TWO (2) X3-01 WORKSTATIONS AND ADD ONE (1) MA-95. TO ACCOMMODATE THE REDEPLOYED EMPLOYEES, WE NEED TO RECONFIGURE TWO STUDENT CUBICLES AND ADD ONE MA TO THE BALTIMORE NORTHEAST FIELD OFFICE - SYSTEMS FURNITURE	\$28,369.62	\$28,369.62	2016	8/3/2016	SS001630624	SS001260003	0	OTHER THAN SMALL BUSINESS
TECHFIRST, INC.	IGF::CT::IGF SIGN LANGUAGE INTERPRETER SERVICES AS A REASONABLE ACCOMMODATION FOR AN EMPLOYEE WHO IS DEAF OR HARD OF HEARING	\$28,334.70	\$28,334.70	2016	9/13/2016	SS001650255		0	SMALL BUSINESS
NEOPOST USA INC.	IGF::OT::IGF STANDARD MAINTENANCE FOR NEOPOST FOLDER INSERTER	\$5,634.12	\$28,170.60	2016	2/4/2016	SS041650003		0	OTHER THAN SMALL BUSINESS
SHI INTERNATIONAL CORP.	COREL WINZIP AND PREMIUM ENTERPRISE	\$27,728.79	\$27,728.79	2016	4/15/2016	SS001650103		0	OTHER THAN SMALL BUSINESS

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HARRIS, THERESE	RIGIF::CL::IGF CLOSELY ASSOCIATED MODIFICATION TO CALL ORDER ADDITION 350 INDEPENDENT DISABILITY CASE REVIEWS AT \$79.07 FOR A TOTAL OF \$27,674.50.	\$27,674.50	\$27,674.50	2016	2/1/2016	10	SS011140018	1	SMALL BUSINESS
HERMAN MILLER, INC.	CONCORD, NH #A010 DESIGN, INSTALLATION AND PRODUCT FOR SYSTEMS FURNITURE	\$27,540.05	\$27,540.05	2015	12/3/2014	SS001530141	SS001260003	0	OTHER THAN SMALL BUSINESS
HERMAN MILLER, INC.	SYSTEMS FURNITURE - SARASOTA, FL X667 DESIGN, PRODUCT AND INSTALLATION	\$27,454.74	\$27,454.74	2017	11/28/2016	SS001730045	SS001260003	0	OTHER THAN SMALL BUSINESS
FIRELINE CORPORATION, THE	IGF::OT::IGF - PURCHASE ORDER SS00-15-50289 FOR TAPE STORAGE LIBRARY SUPPRESSION SYSTEM REMOVAL FROM THE NATIONAL COMPUTER CENTER (NCC) IN BALTIMORE, MD.	\$27,450.00	\$27,450.00	2015	9/17/2015	SS001550289		0	OTHER THAN SMALL BUSINESS
CREATIVE BUSINESS SOLUTIONS, INC.	IGF::OT::IGF LABOR AND MOVING SERVICE CONTRACT. MOD 4; EQUITABLE ADJUSTMENT DUE TO CBA/SCA INCREASES EFFECTIVE 8/1/2016.	\$26,464.00	\$27,274.00	2016	9/29/2016	SS001560040		4	SMALL BUSINESS
TONE SOFTWARE INC	MODIFICATION 001 TO UPGRADE LICENSE AND MAINTENANCE ON DYNA-STEP CPU LICENSE FOR 12 MONTHS	\$26,786.00	\$26,786.00	2015	9/11/2015	SS001550134		1	OTHER THAN SMALL BUSINESS
PITNEY BOWES INC.	PRINT MAIL FACILITY PRODUCTION INVENTORY	\$26,701.05	\$26,701.05	2016	3/16/2016	SS001650085		0	OTHER THAN SMALL BUSINESS
ADMIRAL ELEVATOR COMPANY, INC.	IGF::OT::IGF  TASK ORDER #50  REPLACE APPROXIMATELY 450 SQUARE YARD OF WORN AND DAMAGED CARPET WITHIN THE NATIONAL COMPUTER CENTER CAFE LOUNGE	\$26,258.00	\$26,258.00	2015	8/25/2015	SS001530830	SS001060042	0	SMALL BUSINESS
LEVIN PROFESSIONAL SERVICES, INC.	COMPIX MEDIA CYNERG2 SYSTEMS FOR GRAPHIC DISPLAY FOR LIVE BROADCAST AND WEBINAR PRODUCTIONS. THIS GRAPHICS GENERATOR WILL BE A REPLACEMENT FOR OUR EXISTING UNIT. IT WILL ALLOW FOR 4K RESOLUTION LOWER THIRD GRAPHICS ON PRODUCTIONS.	\$25,866.50	\$25,866.50	2016	9/12/2016	SS001650232		0	SMALL BUSINESS
EAST BAY MUNICIPL UTILITY DISTR	FHFB - UTILITIES - WATER SERVICE. (PP = 11/1/15-10/31/16) TO PROVIDE WATER SERVICE FOR THE BUILDING, DRINKING FOUNTAINS AND FIRE SUPPRESSION AT FRANK HAGEL FEDERAL BUILDING.	\$25,800.00	\$25,800.00	2016	10/8/2015	SS091651001		0	OTHER THAN SMALL BUSINESS
HERMAN MILLER, INC.	B167 KAPOLEI, HI - DESIGN, INSTALLATION AND PRODUCT FOR SYSTEMS FURNITURE.	\$25,623.05	\$25,623.05	2015	5/13/2015	SS001530499	SS001260003	0	OTHER THAN SMALL BUSINESS
DEMAND TECHNOLOGY SOFTWARE, INC.	DEMAND TECHNOLOGY PERFORMANCE SENTRY	\$25,527.00	\$25,527.00	2017	10/27/2016	SS001750016		0	SMALL BUSINESS
DEMAND TECHNOLOGY SOFTWARE, INC.	MAINTAIN DEMAND TECHNOLOGY PERFORMANCE SENTRY SOFTWARE	\$25,527.00	\$25,527.00	2016	10/6/2015	SS001650002		0	SMALL BUSINESS
MICROPACT, INC.	RENEWAL OF SS00-15-50261 FOR MAINTENANCE ON MICROPACT ICOMPLAINTS AND NO FEAR SOFTWARE.	\$25,299.57	\$25,299.57	2016	7/21/2016	SS001650185		0	OTHER THAN SMALL BUSINESS
GALLAGHER BENEFIT SERVICES, INC.	IGF::OT::IGF PURCHASE ORDER FOR RENEWAL OF ELECTRONIC SUBSCRIPTION ENTITLED, GVISOR.  PREVIOUSLY PURCHASED UNDER SS00-12-50086.	\$25,000.00	\$25,000.00	2016	12/23/2015	SS001550050		1	OTHER THAN SMALL BUSINESS
GREEN CONTRACTING COMPANY, INC.	INSTALL LINE STOP ON WATER MAIN IN ACCORDANCE WITH THE ATTACHED STATEMENT OF WORK	\$24,800.00	\$24,800.00	2016	8/12/2016	SS001650221		0	OTHER THAN SMALL BUSINESS
HAROLD E RAMSEY MD	DR. RAMSEY MODIFICATION TO ADD CASES SS00-11-40052  IGF::CT::IGF	\$24,600.00	\$24,600.00	2015	1/13/2015	5	SS001140052	0	SMALL BUSINESS
MSDSPRO, LLC	IGF::CT::IGF MATERIAL SAFETY DATA SHEETS SUBSCRIPTION.	\$24,180.00	\$24,180.00	2016	7/14/2016	SS001650183		0	OTHER THAN SMALL BUSINESS
TOMMY NOBIS ENTERPRISES, INC.	ICHR FILE CLERK SERVICES	\$24,139.14	\$24,139.14	2015	8/26/2015	SS041160000		10	OTHER THAN SMALL BUSINESS
TOMMY NOBIS ENTERPRISES, INC.	ICHR FILE CLERK SERVICES	\$24,139.14	\$24,139.14	2016	12/17/2015	SS041160000		11	OTHER THAN SMALL BUSINESS
CARAHSOFT TECHNOLOGY CORP.	TO PURCHASE 3 MONTHS OF MAINTENANCE FOR HP EDISCOVERY SOFTWARE IN ORDER TO CO-TERMINATE WITH THE MAJORITY OF THE HP SOFTWARE MAINTENANCE PURCHASED WITH BPA SS00-11-40003, WHICH HAS EXPIRED	\$23,993.11	\$23,993.11	2016	6/23/2016	SS001650164		0	OTHER THAN SMALL BUSINESS

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GETTY IMAGES (US), INC	IGF::OT::IGF ONE-YEAR (1) SUBSCRIPTION TO ISTOCK SIGNATURE 750 TEAMSHARE SUBSCRIPTION	\$23,758.00	\$23,758.00	2016	5/4/2016	SS001650121		0	OTHER THAN SMALL BUSINESS
HENSEL PHELPS SERVICES LLC	IGF::CT::IGF	\$23,749.00	\$23,749.00	2016	2/11/2016	SS001630177	SS001461106	0	OTHER THAN SMALL BUSINESS
HERMAN MILLER, INC.	KISSIMMEE, FL AA16 DESIGN, INSTALLATION AND PRODUCT FOR SYSTEMS FURNITURE	\$23,613.99	\$23,613.99	2015	3/27/2015	SS001530349	SS001260003	0	OTHER THAN SMALL BUSINESS
HERMAN MILLER, INC.	ELIZABETHTOWN, KY #C449, INSTALLER HOURS AND PRODUCT FOR SYSTEMS FURNITURE	\$23,490.84	\$23,490.84	2016	7/18/2016	SS001630556	SS001260003	0	OTHER THAN SMALL BUSINESS
COMPUTER MANAGEMENT SCIENCES INC	MAINTAIN COMPUTER MANAGEMENT SCIENCES CPEXPRT SOFTWARE	\$0.00	\$23,333.34	2016	11/19/2015	SS001651006		1	OTHER THAN SMALL BUSINESS
HERMAN MILLER, INC.	LAKEPORT, CA #AA32 - INSTALLATION AND PRODUCT ESTIMATE FOR SYSTEMS FURNITURE	\$23,093.70	\$23,093.70	2015	6/23/2015	SS001530651	SS001260003	0	OTHER THAN SMALL BUSINESS
AUDIMATION SERVICES INC	AUDIMATION CASEWARE IDEA SOFTWARE MAINTENANCE RENEWAL	\$22,750.00	\$22,750.00	2016	1/12/2016	SS001650056		0	SMALL BUSINESS
AUDIMATION SERVICES INC	RENEWAL OF SS00-14-51070 MAINTENANCE OF IDEA SW FOR THE OFFICE OF THE INSPECTOR GENERAL (OIG).	\$22,750.00	\$22,750.00	2015	1/15/2015	SS001550066		0	OTHER THAN SMALL BUSINESS
HERMAN MILLER, INC.	SUMTER, SC A595 DESIGN, PRODUCT AND INSTALLATION FOR SYSTEMS FURNITURE	\$22,591.70	\$22,591.70	2016	4/7/2016	SS001630289	SS001260003	0	OTHER THAN SMALL BUSINESS
NERO INC	RENEWAL ON NERO 9 SOFTWARE LICENSE MAINTENANCE	\$86,321.09	\$22,421.09	2016	10/19/2015	SS001560003		1	SMALL BUSINESS
HERMAN MILLER, INC.	DALLAS, TEXAS # 5B86 SYSTEMS FURNITURE - 2ND FLOOR INSTALLATION&PRODUCT	\$22,304.94	\$22,304.94	2015	5/29/2015	SS001530550	SS001260003	0	OTHER THAN SMALL BUSINESS
INTERGRAL INFORMATION SOLUTIONS GMBH	RENEWAL MAINTENANCE ON FUSIONREACTOR SOFTWARE PRODUCTS	\$22,157.00	\$22,157.00	2015	4/1/2015	SS001550097		0	SMALL BUSINESS
M-TECH MECHANICAL, LLC	IGF::CT::IGF  MECHANICAL SHAFT SEAL REPLACEMENT - EMERGENCY REPAIRS; YORK 1200 TON YK CENTRIFUGAL CHILLER #3, LOCATED AT THE SSA, ALTMAYER BUILDING.	\$22,132.00	\$22,132.00	2016	2/3/2016	SS001650061		0	SMALL BUSINESS
HPI/GSA - 2B, L.P.	IGF::OT::IGF RMC HVAC REQUISITION	\$21,960.00	\$21,960.00	2015	6/26/2015	SS061550005		0	OTHER THAN SMALL BUSINESS
HPI/GSA - 2B, L.P.	IGF::OT::IGF PROVIDE RO OVERTIME AIR-CONDITIONING/HEATING FOR THE 8TH FLOOR ANNEX DPU AND ALL OTHER COMPONENTS SSA COMPONENTS LOCATED AT 1301 YOUNG ST. DALLAS TX 75202.	\$21,600.00	\$21,600.00	2016	9/8/2016	SS061650006		0	OTHER THAN SMALL BUSINESS
HPI/GSA - 2B, L.P.	IGF::OT::IGF RMC HVAC REQUISITION	\$21,240.00	\$21,240.00	2016	6/14/2016	SS061650004		0	OTHER THAN SMALL BUSINESS
HERMAN MILLER, INC.	WINDER, GA YC31 DESIGN, PRODUCT AND INSTALLATION OF 5 WORKSTATIONS FOR SYSTEMS FURNITURE	\$20,714.64	\$20,714.64	2016	5/2/2016	SS001630348	SS001260003	0	OTHER THAN SMALL BUSINESS
ROBERTA A SCHULMAN PHD	DR. SCHULMAN MODIFICATION TO ADD CASES SS00-11-40041  IGF::CT::IGF	\$20,500.00	\$20,500.00	2015	2/12/2015		6 SS001140041	1	SMALL BUSINESS
HERMAN MILLER, INC.	BEDFORD HEIGHTS, NY #A160 - TWO NEW HIRES AND REQUIRE TWO NEW SYSTEMS FURNITURE WORKSTATIONS	\$20,475.08	\$20,475.08	2016	7/22/2016	SS001630593	SS001260003	0	OTHER THAN SMALL BUSINESS
NATIONAL JOURNAL GROUP INC	IGF::OT::IGF FY 2017 ANNUAL SUBSCRIPTION RENEWAL FOR NATIONAL JOURNAL	\$20,010.00	\$20,010.00	2017	10/1/2016	SS001750002		0	SMALL BUSINESS
I/S MANAGEMENT STRATEGIES LTD	RENEWAL OF SS00-15-50037 MAINTENANCE OF I/S MANAGEMENT STRATEGIES SW	\$20,000.00	\$20,000.00	2016	11/5/2015	SS001650022		0	OTHER THAN SMALL BUSINESS
HERMAN MILLER, INC.	YAKIMA, WA I919 - RECONFIGURATION OF TWO X-95 WORKSTATIONS (#19 AND #20)INTO MA WORKSTATIONS FOR SYSTEMS FURNITURE.	\$19,856.70	\$19,856.70	2015	1/12/2015	SS001530208	SS001260003	0	OTHER THAN SMALL BUSINESS
PITNEY BOWES INC.	MAILROOM SUPPLIES NEEDED FOR THE OPERATION OF THE MAIL METERING EQUIPMENT.	\$19,713.30	\$19,713.30	2015	8/12/2015	SS001550255		0	OTHER THAN SMALL BUSINESS
EASTMAN KODAK COMPANY	THIS IS THE ANNUAL PROCUREMENT OF INK FOR SSA'S VL2000 KODAK PRINTERS, OTHERWISE KNOWN AS THE SSN CARD PRINTERS.  THE PROCUREMENT INCLUDE INK AND SPECIALIZED KODAK CLEANER NEEDS FOR BOTH THE NCC AND SSC SITES. DUE TO STORAGE LIMITATIONS IN THE SSC, SHIPMENTS WILL BE DELIVERED TO THE NCC AND NCC STAFFS WILL SEND INK TO THE SSC AS NEEDED.	\$19,600.00	\$19,600.00	2015	4/17/2015	SS001550120		0	OTHER THAN SMALL BUSINESS
HPI/GSA - 2B, L.P.	IGF::OT::IGF RO OVERTIME UTILITIES FY15	\$19,560.00	\$19,560.00	2015	8/7/2015	SS061550003		0	OTHER THAN SMALL BUSINESS



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ROCKET SOFTWARE, INC.	MAINTENANCE ON ROCKET DASD SOFTWARE AND ROCKET ALDON SOFTWARE	\$19,541.70	\$19,541.70	2015	3/31/2015	SS001550025		1	OTHER THAN SMALL BUSINESS
TELESTREAM, INC.	THE OCOMM REQUEST SEVEN LICENSES OF CAPTIONMAKER-PRO SOFTWARE, TWO LICENSES OF CAPTIONMAKER-ENTERPRISE SOFTWARE AND ONE YEAR OF MAINTENANCE AND SUPPORT PER LICENSE	\$19,428.00	\$19,428.00	2015	6/9/2015	SS001550163		0	OTHER THAN SMALL BUSINESS
HERMAN MILLER, INC.	KOSCIUSKO, MS #CB15 - DESIGN, INSTALLATION AND PRODUCT FOR SYSTEMS FURNITURE	\$19,422.56	\$19,422.56	2015	3/19/2015	SS001530325	SS001260003	0	OTHER THAN SMALL BUSINESS
VIZUALL, INC	RENEW MAINTENANCE FOR VIZUALL, SCHEDUALL SILVER SERVICE SOFTWARE. SS00-14-51276	\$19,124.10	\$19,124.10	2015	5/12/2015	SS001550142		0	SMALL BUSINESS
THREATGUARD, INC.	THE OFFICE OF TELECOMMUNICATIONS AND SYSTEMS OPERATION REQUEST RENEWAL OF SS00-14-51162 THREATGUARD SECUTOR PRIME AUDITOR LICENSES&MAINTENANCE	\$19,000.00	\$19,000.00	2015	6/9/2015	SS001550164		0	SMALL BUSINESS
HEALTH SERVICES, ARIZONA DEPT OF	NON-ELECTRONIC DEATH RECORDS - ARIZONA THE PURPOSE OF MODIFICATION NUMBER 5 IS TO EXERCISE OPTION YEAR THREE TO EXTEND THE TERM OF THE CONTRACT FROM JANUARY 1, 2015 THROUGH DECEMBER 31, 2015 FOR RECEIPT OF ELECTRONIC DEATH RECORDS.	\$0.00	\$18,935.00	2015	12/16/2014	SS001260014		5	OTHER THAN SMALL BUSINESS
NATIONAL JOURNAL GROUP INC	FY 2016 SUBSCRIPTION TO THE NATIONAL JOURNAL WWW.NATIONALJOURNAL.COM PERIOD OF PERFORMANCE 10/01/2015 - 9/30/2016.	\$18,720.00	\$18,720.00	2016	10/1/2015	SS001650004		0	SMALL BUSINESS
HERMAN MILLER, INC.	BOCA RATON, FL IC16 DESIGN AND INSTALLATION FOR SYSTEMS FURNITURE	\$18,409.59	\$18,409.59	2016	11/10/2015	SS001630048	SS001260003	0	OTHER THAN SMALL BUSINESS
REPLIWEB, INC.	MAINTENANCE ON ATTUNITY REPLIWEB	\$18,391.80	\$18,391.80	2016	6/6/2016	SS001650133		0	SMALL BUSINESS
HERMAN MILLER, INC.	SYSTEMS FURNITURE CONTRACT - SUMTER, SC #1595 DESIGN, PRODUCT AND INSTALLATION	\$18,371.64	\$18,371.64	2017	11/28/2016	SS001730046	SS001260003	0	OTHER THAN SMALL BUSINESS
HERMAN MILLER, INC.	ALBUQUERQUE NM ODAR #YX12 INSTALLATION OF 11 E-01 SYSTEMS FURNITURE WORKSTATIONS.	\$18,190.14	\$18,190.14	2015	8/6/2015	SS001530521	SS001260003	1	OTHER THAN SMALL BUSINESS
EMPLOYMENT DEVELOPMENT, CALIFORNIA DEPARTMENT OF	CALIFORNIA EMPLOYMENT DEVELOPMENT DEPARTMENT IGF::CT::IGF  CALIFORNIA EDD IS THE STATE AGENCY RESPONSIBLE FOR ADMINISTERING AND PROVIDING INFORMATION ON STATE DISABILITY INSURANCE (SDI) BENEFITS. SDI BENEFITS OFFSET SSDI PAYMENTS. IN ORDER TO ACCURATELY PAY BENEFICIARIES, SDI PAYMENT ACCOUNTS MUST BE VERIFIED.  THE EDD AGREES TO PROVIDE CONFIDENTIAL CURRENT AND ARCHIVE DISABILITY INSURANCE CLAIM HISTORY TO SSA. SSA WILL USE THE INFORMATION FOR THE PURPOSE OF DETERMINING THE AMOUNT OF SOCIAL SECURITY BENEFITS PAYABLE UNDER TITLE II SECTION 224 OF THE SOCIAL SECURITY ACT (42 U.S.C. 424A) AS REQUIRED BY SECTION 1137 OF THE SOCIAL SECURITY ACT (42 U.S.C. 1320B-7), SECTION 1106 OF THE SOCIAL SECURITY ACT (42 U.S.C. 1306), THE PRIVACY ACT (5 U.S.C. 552), AND THE FREEDOM OF INFORMATION ACT (5 U.S.C.552).	\$18,000.00	\$18,000.00	2016	6/14/2016	SS091652002		0	OTHER THAN SMALL BUSINESS
EMPLOYMENT DEVELOPMENT, CALIFORNIA DEPARTMENT OF	IGF::CT::IGF  THE CALIFORNIA EMPLOYMENT DEVELOPMENT DEPARTMENT (EDD) IS THE PROVIDER FOR BENEFICIARY DISABILITY INFORMATION.	\$18,000.00	\$18,000.00	2015	9/3/2015	SS091551010		0	OTHER THAN SMALL BUSINESS
SABREE, INC.	IGF::OT::IGF  CAGE CODE: 4KUQ1  REMOVE OF CARPET TILE/FLOOR TILE IN ROOM 633 ALTMeyer BUILDING.	\$17,813.91	\$17,813.91	2015	12/10/2014	SS001530082	SS001461113	0	SMALL BUSINESS
HERMAN MILLER, INC.	MT. PLEASANT TX FO #X122. INSTALLATION OF A P-01 WORKSTATION, 1 / 2 OTHER WORKSTATIONS AFFECTED; TOTAL 3.	\$17,696.96	\$17,696.96	2016	1/11/2016	SS001630136	SS001260003	0	OTHER THAN SMALL BUSINESS

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FUTURENET SECURITY SOLUTIONS, LLC	IGF::OT::IGF - PURCHASE ORDER SS00-15-50192 FOR VEHICLE BARRIER PARTS AND REPAIR AT THE SECOND SUPPORT CENTER (SSC) IN DURHAM, NC.	\$17,689.00	\$17,689.00	2015	7/8/2015	SS001550192			0 OTHER THAN SMALL BUSINESS
SIGNET TECHNOLOGIES, INC.	IGF::OT::IGF OTHER FUNCTION LENEL PART NUMBER: NEC ECLANX64-R2-R3X64 EXPRESSCLUSTER X LAN 64 BIT (R1 OR R2) UPGRADE, TWO UNINTERRUPTIBLE POWER SUPPLY, AND INSTALLATION SERVICES FOR THE OFFICE OF DISABILITY ADJUDICATION AND REVIEW, 5107 LEESBURG PIKE, FALLS CHURCH, VIRGINIA.	\$17,627.84	\$17,627.84	2015	3/16/2015	SS001550093			0 SMALL BUSINESS
HENSEL PHELPS SERVICES LLC	IGF::OT::IGF  PROVIDE FOUR (4) DEDICATED WORKSTATIONS WITH ASSOCIATED HARDWARE AND SOFTWARE FOR THE BUILDING AUTOMATION SYSTEM (BAS) AT THE NSC. THE BAS IS CURRENTLY EMBEDDED WITHIN THE SIEMENS PROCESS CONTROL SYSTEM (PCS7) THAT IS CAUSING UNSTABLE OPERATION OF BOTH SYSTEMS.	\$17,432.35	\$17,432.35	2016	3/29/2016	SS001630253	SS001461106		0 OTHER THAN SMALL BUSINESS
HELP/SYSTEMS, LLC	MAINTENANCE RENEWAL- ISERIES AUDIT AND VULNERABILITY ASSESSMENT TOOL (COMPLIANCE MONITOR)	\$17,405.00	\$17,405.00	2015	8/21/2015	SS001550015			1 OTHER THAN SMALL BUSINESS
JOHNSON CONTROLS, INC.	IGF::CT::IGF  CAGE CODE: 25244  SERVICE TO PERFORM EMERGENCY REPAIRS TO THE NCC UTILITY BUILDING 1000 TON YK YORK CENTRIFUGAL CHILLER LUBE OIL PUMP.	\$17,380.00	\$17,380.00	2015	12/8/2014	SS001550043			0 OTHER THAN SMALL BUSINESS
FEDERAL PRISON INDUSTRIES INC	NATIONAL COMPUTER CENTER FILTER ORDER	\$17,104.80	\$17,104.80	2015	5/19/2015	SS001550146			0 OTHER THAN SMALL BUSINESS
HERMAN MILLER, INC.	PORTLAND, OR CBT28 ODAR - RECONFIGURATION SYSTEMS FURNITURE	\$17,073.68	\$17,073.68	2015	2/3/2015	SS001530240	SS001260003		0 OTHER THAN SMALL BUSINESS
BLUE TECH INC.	RENEW MAINTENANCE FOR NTPS SAN 64-BIT SOFTWARE.	\$17,000.00	\$17,000.00	2015	5/5/2015	SS001550136			0 SMALL BUSINESS
HERMAN MILLER, INC.	UPPER DARBY, PA #X243 SYSTEMS FURNITURE CONTRACT - ADD AND CREATE NEW NUMBERS FOR TWO (2) NEW MA-11 WORKSTATIONS TO SUPPORT NEW HIRES	\$16,997.08	\$16,997.08	2016	9/15/2016	SS001630803	SS001260003		0 OTHER THAN SMALL BUSINESS
LABOR AND INDUSTRY, MONTANA DEPARTMENT OF	DATA EXCHANGE CHARGES FOR ACCESS TO MONTANA STATE RECORDS ONLINE USED TO VERIFY SSA CLAIMANTS RECORDS.	\$16,893.36	\$16,893.36	2016	8/10/2016	SS081650002			0 OTHER THAN SMALL BUSINESS
REPLIWEB, INC.	MAINTAIN ATTUNITY REPLIWEB SOFTWARE	\$16,777.80	\$16,777.80	2015	6/29/2015	SS001550180			0 SMALL BUSINESS
HERMAN MILLER, INC.	NAPLES, FL YC18, DESIGN, INSTALL AND PRODUCT FOR SYSTEMS FURNITURE	\$16,646.70	\$16,646.70	2015	8/25/2015	SS001530886	SS001260003		0 OTHER THAN SMALL BUSINESS
UNITED STATES POSTAL SERVICE	POST OFFICE BOX RENTAL RENEWAL. THE PURPOSE OF THIS AWARD IS TO RENEW THE WBD0C POST OFFICE BOXES USED TO SEPARATE INBOUND MAIL TO BE DELIVERED TO SPECIFIC COMPONENTS. IGF::CL::IGF	\$16,640.00	\$16,640.00	2016	6/2/2016	SS031650006			0 OTHER THAN SMALL BUSINESS
UNITED STATES POSTAL SERVICE	THE PURPOSE OF THIS MODIFICATION IS TO CHANGE THE PAYMENT TYPE FROM PURCHASE CARD TO INVOICE. THIS MODIFICATION WILL RESTORE THE FUNDING TO THIS AWARD. IGF::CL::IGF	\$16,640.00	\$16,640.00	2016	7/12/2016	SS031650006			2 OTHER THAN SMALL BUSINESS
HERMAN MILLER, INC.	IE29 WEST SACRAMENTO, CA - SYSTEMS FURNITURE - TO RECONFIGURE (2) X-3 WORKSTATIONS TO (2) MA-95 WORKSTATIONS.	\$16,524.70	\$16,524.70	2015	12/12/2014	SS001530158	SS001260003		0 OTHER THAN SMALL BUSINESS
HERBERT KUSHNER	DR. KUSHNER MODIFICATION TO ADD CASES SS00-11-40079  IGF::CT::IGF	\$16,400.00	\$16,400.00	2015	1/14/2015		6 SS001140079		0 SMALL BUSINESS
DANIEL R MALONE	DR. MALONE MODIFICATION TO ADD CASES SS00-11-40073  IGF::CT::IGF	\$16,400.00	\$16,400.00	2015	1/13/2015		6 SS001140073		0 SMALL BUSINESS
JACOB TENDLER MD	DR. TENDLER MODIFICATION TO ADD CASES SS00-11-40032  IGF::CT::IGF	\$16,400.00	\$16,400.00	2015	4/23/2015		6 SS001140032		1 SMALL BUSINESS

Vendor Name	Description of Requirement	Action Obligation	Base and All Options Value	Fiscal Year	Date Signed	PO/Delivery Order/Task Order/Call#	Parent Contract	Mod #	Contracting Officers Business Size Selection
	DR. UNGER MODIFICATION TO ADD CASES SS00-11-40027								
UNGER MD, H THOMAS	IGF::CT::IGF	\$16,400.00	\$16,400.00	2015	1/13/2015	7	SS001140027	0	SMALL BUSINESS
COVERBIND CORPORATION	COVERBIND 9000 BINDING MACHINE THAT INCLUDES A ONE (1) YEAR ANNUAL EXTENDED WARRANTY.	\$16,321.40	\$16,321.40	2015	7/23/2015	SS001550225		0	SMALL BUSINESS
PCMG, INC.	RED GIANT ADOBE SOFTWARE PLUG-IN WILL ALLOW THE BROADCAST CENTER TO DESIGN AND BUILD GRAPHICS FOR VIDEO MORE QUICKLY AND EFFICIENTLY. THIS PRODUCT IS A PLUG-IN FOR MULTIPLE GRAPHIC PACKAGES THAT WE USE IN THE BROADCAST CENTER. THIS IS COMPATIBLE WITH ADOBE SOFTWARE AND OUR AVID EDITING SOFTWARE.	\$16,195.95	\$16,195.95	2016	8/2/2016	SS001650198		0	OTHER THAN SMALL BUSINESS
UNITED STATES POSTAL SERVICE	RENEWL WBDO POST OFFICE BOXES FOR 1 YEAR FROM 7/1/2015 TO 6/30/2016- POST OFFICE BOXES CRITICAL TO WBDOC COMPONENT'S WORKLOAD. IGF::CL::IGF	\$16,120.00	\$16,120.00	2015	6/1/2015	SS031550011		0	OTHER THAN SMALL BUSINESS
SABREE, INC.	REMOVAL OF ASBESTOS TILE, CARPET TILE AND ASSOCIATED MASTIC, FLOORING ADHESIVE. OPTION PERIOD TWO PRICING.  IGF::OT::IGF	\$16,093.69	\$16,093.69	2016	9/29/2016	SS001630855	SS001461113	0	SMALL BUSINESS
EASTMAN KODAK COMPANY	KODAK VERSAMARK FV5003 20L JUG, BLACK INK FOR KODAK VL2000 SSN CARD PRINTER.	\$16,000.00	\$16,000.00	2016	8/24/2016	SS001650239		0	OTHER THAN SMALL BUSINESS
ADAPTAVIST.COM LTD	THIS IS FOR THE PURCHASE OF 2000 ATlassian CONFLUENCE LICENSES.	\$16,000.00	\$16,000.00	2015	8/7/2015	SS001550250		0	SMALL BUSINESS
DAYTNER CORPORATION, THE	IGF::OT::IGF NCC MEANDERING STREAM PROJECT TO AMEND THE LANDSCAPING RENOVATION OF THE MEANDERING STREAM TO PREVENT FURTHER EROSION OF THE TOPOGRAPHIC FLOODPLAIN AREA	\$15,811.00	\$15,811.00	2017	11/10/2016	SS001750025		0	SMALL BUSINESS
SABREE, INC.	IGF::OT::IGF  CAGE CODE: 4KUQ1  REMOVE APPROXIMATELY 150 SQUARE FEET OF ASBESTOS- CONTAINING FLOOR TILE AND MASTIC IN THE WEST HIGH RISE BUILDING, PLUMBING SHOP	\$15,797.34	\$15,797.34	2015	9/24/2015	SS001531002	SS001461113	0	SMALL BUSINESS
BARRATT EDWARDS INTERNATIONAL CORPORATION	RENEWAL OF MAINTENANCE ON ULTRABAC SOFTWARE FOR THE PERIOD OF PERFORMANCE OF APRIL 1, 2016 THROUGH SEPTEMBER 30, 2016.	\$15,750.00	\$15,750.00	2016	3/14/2016	SS001650084		0	SMALL BUSINESS
FIRE & LIFE SAFETY AMERICA, INC.	IGF::OT::IGF THE PURPOSE OF MODIFICATION 004 IS TO EXTEND THE PERIOD OF PERFORMANCE AND ADD ADDITIONAL FUNDING NEEDED	\$15,653.00	\$15,653.00	2016	9/22/2016	SS001650137		4	OTHER THAN SMALL BUSINESS
INTERGRAL INFORMATION SOLUTIONS GMBH	MAINTENANCE ON FUSION PRODUCTS	\$15,579.00	\$15,579.00	2016	5/13/2016	SS001650126		0	SMALL BUSINESS
DLT SOLUTIONS INCORPORATED	EXERCISE AN OPTION FOR THE PERIOD JANUARY 1, 2016 THROUGH APRIL 30, 2016 FOR MAINTENANCE.	\$15,577.27	\$15,577.27	2016	2/5/2016	SS001431684	W91QUZ06A0004	4	SMALL BUSINESS
TCG PROPERTY CORPORATION	IGF::OT::IGF - MECHANICAL MAINTENANCE, CUSTODIAL, AND TRASH SORTING SERVICES AT THE SOCIAL SECURITY ADMINISTRATION'S SECURITY WEST BUILDING IN BALTIMORE, MD. THE PURPOSE OF THIS MODIFICATION IS TO PROVIDE ADDITIONAL FUNDING.	\$15,507.80	\$15,507.80	2015	9/17/2015	SS001461112		2	SMALL BUSINESS
NORCON COMMUNICATIONS INC	TO PURCHASE WIRELESS HEADSETS TO USE WITH THE NORCON UNITS AT OUR HOBOKEN NJ AND HUMACAO PR SSA FIELD OFFICES. THESE WIRELESS HEADSETS WOULD FACILITATE COMMUNICATION BETWEEN OUR EMPLOYEES AND CLIENTS IN THEIR RESPECTIVE OFFICES.	\$15,450.49	\$15,450.49	2016	7/18/2016	SS021650032		0	SMALL BUSINESS
JOHNSON CONTROLS, INC.	THE MAIN SHAFT SEAL ON CHILLER #1 IN THE NCC'S UTILITY BUILDING YORK IS WORN AND LEAKING OIL ONTO THE GROUND.	\$15,413.00	\$15,413.00	2016	4/26/2016	SS001650111		0	OTHER THAN SMALL BUSINESS
COMCAST CABLE COMMUNICATIONS, LLC	ATLANTA RO - CABLE TV IGF::OT::IGF	\$3,191.20	\$15,160.00	2015	9/30/2015	SS041550035		0	OTHER THAN SMALL BUSINESS

Vendor Name	Description of Requirement	Action Obligation	Base and All Options Value	Fiscal Year	Date Signed	PO/Delivery Order/Task Order/Call#	Parent Contract	Mod #	Contracting Officers Business Size Selection
SABREE, INC.	IGF::OT::IGF  CAGE CODE: 4KUQ1  REMOVE CARPET TILE/FLOOR FROM ROOM L-1110 WEST LOW RISE BUILDING.	\$15,023.71	\$15,023.71	2015	12/10/2014	SS001530123	SS001461113	0	SMALL BUSINESS
EAST BAY MUNICIPL UTILITY DISTR	IGF::CT::IGF CRITICAL FUNCTIONS BUILDING WATER SERVICES AND FIRE SUPPRESSION	\$15,000.00	\$15,000.00	2015	9/22/2015	SS091551001		1	OTHER THAN SMALL BUSINESS
SHUTTERSTOCK, INC.	IGF::OT::IGF THIS IS A VIDEO DOWNLOAD SOFTWARE THAT WILL HELP MEET THE ACTING COMMISSIONERS GOAL TO GET MORE COMMUNICATION TO EMPLOYEES. WE USE THIS SOFTWARE FOR INTERNAL AND EXTERNAL VIDEOS	\$14,880.00	\$14,880.00	2015	9/14/2015	SS001550288		0	OTHER THAN SMALL BUSINESS
SHUTTERSTOCK, INC.	IGF::OT::IGF THIS IS A VIDEO DOWNLOAD SOFTWARE THAT WILL HELP MEET THE ACTING COMMISSIONERS GOAL TO GET MORE COMMUNICATION TO EMPLOYEES. WE USE THIS SOFTWARE FOR INTERNAL AND EXTERNAL VIDEOS	\$14,880.00	\$14,880.00	2016	7/5/2016	SS001650166		0	OTHER THAN SMALL BUSINESS
HERMAN MILLER, INC.	ROLLA, MO (C750) DESIGN, PRODUCT, INSTALLATION, AND TRAVEL COSTS TO INSTALL 9 HMI CONCAVE TABLES; SYSTEMS FURNITURE.	\$14,737.58	\$14,737.58	2015	2/23/2015	SS001530283	SS001260003	0	OTHER THAN SMALL BUSINESS
JOHNSON CONTROLS, INC.	EMERGENCY CHILLER PO IGF::CT::IGF	\$14,725.00	\$14,725.00	2015	2/18/2015	SS001550070		0	OTHER THAN SMALL BUSINESS
AMERICAN MEDICAL ASSOCIATION	IGF::OT::IGF AMA GUIDES TO EVALUATION OF PERMANENT IMPAIRMENT SUBSCRIPTION.	\$14,550.00	\$14,550.00	2015	8/13/2015	SS001550238		0	OTHER THAN SMALL BUSINESS
TECHFIRST, INC.	IGF::CT::IGF SIGN LANGUAGE INTERPRETER SERVICES AS A REASONABLE ACCOMMODATION FOR EMPLOYEES WHO ARE DEAF OR HARD OF HEARING	\$14,548.80	\$14,548.80	2016	9/27/2016	SS001650271		0	SMALL BUSINESS
ESVA	RENEWAL OF SS00-15-50149 FOR AXCELER CONTROL POINT.	\$14,517.24	\$14,517.24	2016	6/30/2016	SS001650158		0	OTHER THAN SMALL BUSINESS
HERMAN MILLER, INC.	PASADENA, CA C957 - RECONFIGURATION OF TWO X3-95 WORKSTATIONS TO ONE MA-95 WORKSTATION FOR SYSTEMS FURNITURE	\$14,503.54	\$14,503.54	2016	6/6/2016	SS001630427	SS001260003	0	OTHER THAN SMALL BUSINESS
B.S. ENVIRONMENTAL, INC.	THE UPS BATTERIES CONTAIN LEAD AND ACID. THESE HAZARDOUS MATERIALS MUST BE REMOVED AND DISPOSED OF ACCORDING TO STATE AND FEDERAL REGULATIONS. THE REMOVAL OF THIS MATERIAL IS LABOR INTENSIVE AND REQUIRES CERTIFIED TECHNICIANS TO PERFORM THIS FUNCTION. THE SSA HAZARDOUS WASTE CONTRACTOR IS CAPABLE OF PROVIDING THIS SERVICE FOR THE AGENCY. IGF::OT::IGF	\$14,475.00	\$14,475.00	2015	4/9/2015	SS001431944	SS001461041	1	SMALL BUSINESS
ZUNIGA MD, LUIS M	DR. ZUNIGA MODIFICATION TO ADD CASES SS00-11-40021  IGF::OT::IGF	\$14,350.00	\$14,350.00	2015	5/11/2015		5 SS001140021	1	SMALL BUSINESS
NORTHROP GRUMMAN INFORMATION TECHNOLOGY INC	IGF::OT::IGF: SOFTWARE TO SUPPORT DEPLOYMENT TRACKING ON NETWORK INFRASTRUCTURE SUPPORT SERVICES CALL ORDER.	\$14,311.55	\$14,311.55	2016	4/7/2016	SS001650082		0	OTHER THAN SMALL BUSINESS
DLT SOLUTIONS, LLC	FLEXERA ADMINSTUDIO, FLEXWRAP AND FLEXNET MANAGER	\$14,276.86	\$14,276.86	2015	7/20/2015	SS001550212		0	OTHER THAN SMALL BUSINESS
HERMAN MILLER, INC.	TWIN FALLS, ID I896 DESIGN AND INSTALLATION SERVICES AS WELL AS PRODUCT TO RECONFIGURE OFFICE (4 WORKSTATIONS INVOLVED) ROSE COLOR FABRIC, BUT NO NEW PANELS REQUIRED FOR SYSTEMS FURNITURE	\$14,083.54	\$14,083.54	2016	6/6/2016	SS001630425	SS001260003	0	OTHER THAN SMALL BUSINESS
HERMAN MILLER, INC.	SAN JUAN, PR #AE04 SYSTEMS FURNITURE DESIGN, INSTALLATION AND PRODUCT.	\$13,813.85	\$13,813.85	2015	12/15/2014	SS001432040	SS001260003	1	OTHER THAN SMALL BUSINESS
HERMAN MILLER, INC.	G218- PHILADELPHIA,(GERMANTOWN),PA DESIGN, INSTALLATION, AND PRODUCT FOR SYSTEMS FURNITURE	\$13,727.35	\$13,727.35	2015	7/16/2015	SS001530736	SS001260003	0	OTHER THAN SMALL BUSINESS
ADMIRAL ELEVATOR COMPANY, INC.	IGF::OT::IGF  TASK ORDER #48 SS00-15-30656  REPLACE WORN AND DAMAGED CARPET IN EAST HIGH RISE 5TH FLOOR FROM 5-A-3 TO 5-A-8	\$13,712.63	\$13,712.63	2015	6/29/2015	SS001530656	SS001060042	0	SMALL BUSINESS

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LABOR AND INDUSTRY, MONTANA DEPARTMENT OF	IGF::OT::IGF REGION 8 SMALL CONTRACTS- ONLINE ACCESS TO MONTANA STATE RECORDS TO SOCIAL SECURITY ADMINISTRATION REGION 8 OFFICES.	\$13,700.00	\$13,700.00	2015	8/17/2015	SS081550002		0	OTHER THAN SMALL BUSINESS
COMPONENTSOURCE, INC.	THE OFFICE OF TELECOMMUNICATIONS AND SYSTEMS OPERATIONS REQUEST DEVEXPRESS DEVELOPMENT LICENSES TO REPLACE END-OF-LIFE DEVEXPRESS LEGACY PRODUCT.	\$13,679.80	\$13,679.80	2015	4/16/2015	SS001550115		0	SMALL BUSINESS
BILLINGHURST, CRAIG MD	IGF::CL::IGF	\$13,617.00	\$13,617.00	2015	7/14/2015	13	SS061140003	1	SMALL BUSINESS
CQ-ROLL CALL, INC.	2017 SUBSCRIPTION RENEWAL FOR FEDERAL NEWS SERVICE	\$13,500.00	\$13,500.00	2017	10/1/2016	SS001750006		0	OTHER THAN SMALL BUSINESS
CQ-ROLL CALL, INC.	PURCHASE ORDER FOR SUBSCRIPTION RENEWAL FOR FEDERAL NEWS SERVICE. PERIOD OF PERFORMANCE 10/01/2015 - 9/30/2016.	\$13,500.00	\$13,500.00	2016	10/1/2015	SS001650006		0	OTHER THAN SMALL BUSINESS
I/S MANAGEMENT STRATEGIES LTD	RENEWAL OF SS00-15-50037 MAINTENANCE OF I/S MANAGEMENT STRATEGIES SW	\$0.00	\$13,334.00	2016	12/17/2015	SS001650022		1	OTHER THAN SMALL BUSINESS
CEIA USA, LTD	WALK-THROUGH METAL DETECTOR	\$13,251.15	\$13,251.15	2015	4/15/2015	SS041550022		0	SMALL BUSINESS
FIRE & LIFE SAFETY AMERICA, INC.	IGF::OT::IGF THE PURPOSE OF THIS PURCHASE ORDER IS TO HAVE FIRE AND LIFE SAFETY AMERICA COME OUT AND REPAIR TWO FIRE PUMPS.	\$13,225.56	\$13,225.56	2016	5/19/2016	SS001650137		0	OTHER THAN SMALL BUSINESS
HERMAN MILLER, INC.	STERLING HEIGHTS, MI XD14 OFFICE IS ADDING A WORKSTATION AND RECONFIGURING ANOTHER; DESIGN, INSTALLATION SERVICES AND ESTIMATED PRODUCT COSTS ARE REQUIRED FOR SYSTEMS FURNITURE.	\$13,186.54	\$13,186.54	2016	4/20/2016	SS001630316	SS001260003	0	OTHER THAN SMALL BUSINESS
HERMAN MILLER, INC.	MILWAUKEE S, WI #XE26- ADD ON - SYSTEMS FURNITURE	\$13,068.54	\$13,068.54	2016	9/12/2016	SS001630768	SS001260003	0	OTHER THAN SMALL BUSINESS
ADMIRAL ELEVATOR COMPANY, INC.	IGF::OT::IGF  TASK ORDER #43 SS00-15-30655  REMOVE AND REPLACE THE CARPET TILE IN THE EAST HIGH RISE GROUND FLOOR CONFERENCE CENTER.	\$13,034.94	\$13,034.94	2015	6/24/2015	SS001530655	SS001060042	0	SMALL BUSINESS
HERMAN MILLER, INC.	JUNEAU, AK C996 - DESIGN, PRODUCT ESTIMATE AND INSTALL SERVICES FOR SYSTEMS FURNITURE.	\$13,014.64	\$13,014.64	2015	12/12/2014	SS001530156	SS001260003	0	OTHER THAN SMALL BUSINESS
HERMAN MILLER, INC.	FORT SMITH AR Y756 DESIGN, INSTALLATION, AND PRODUCT FOR SYSTEMS FURNITURE.	\$12,914.35	\$12,914.35	2015	4/17/2015	SS001530420	SS001260003	0	OTHER THAN SMALL BUSINESS
B.S. ENVIRONMENTAL, INC.	HAZARDOUS WASTE AND SURPLUS CHEMICALS WERE GENERATED DURING ROUTINE BUILDING OPERATIONS AND MAINTENANCE. SSA CAN STORE THESE MATERIALS FOR 90 DAYS AND THEN THEY MUST BE PROPERLY DISPOSED OF ACCORDING TO LOCAL , STATE, AND FEDERAL REGULATIONS OR THE AGENCY WILL BE NON COMPLIANT WITH SEVERAL STATE AND FEDERAL REGULATIONS.  FPDS FUNCTION: IGF::OT::IGF	\$12,755.00	\$12,755.00	2015	3/13/2015	SS001530320	SS001461041	0	SMALL BUSINESS
ROSS, JEROME H LTD	IGF::OT::IGF TO PROCURE SERVICES TO CONDUCT AN ARBITRATION HEARING AND RECEIVE A DECISION ISSUANCE CONCERNING LABOR GRIEVANCE FILED BY THE ASSOCIATION OF ADMINISTRATIVE LAW JUDGES. ALL IN COMPLIANCE WITH THE COLLECTIVE BARGAINING AGREEMENT.	\$12,751.86	\$12,751.86	2016	6/7/2016	SS001650184		0	SMALL BUSINESS
COMCAST OF BOSTON, INC.	IGF::OT::IGF OTHER FUNCTIONS COMCAST SERVICE BOSTON REGIONAL OFFICE, FLOOR 19, 21 AND 6.	\$6,400.00	\$12,679.40	2016	10/19/2015	SS011660001		0	OTHER THAN SMALL BUSINESS
COMCAST OF BOSTON, INC.	IGF::OT::IGF OTHER FUNCTIONS COMCAST SERVICE BOSTON REGIONAL OFFICE, FLOOR 19, 21 AND 6.	\$6,400.00	\$12,679.40	2016	10/19/2015	SS011660001		0	OTHER THAN SMALL BUSINESS
INNOVATION DATA PROCESSING, INC.	ADDITION MSU'S INNOVATION DATA PROCESSING SOFTWARE UPGRADES - 3 MONTHS	\$12,654.00	\$12,654.00	2015	12/18/2014	SS001550008		1	OTHER THAN SMALL BUSINESS
IMMIXTECHNOLOGY, INC.	RENEWAL OF SS00-14-51278 FOR VOVICI SOFTWARE	\$12,621.03	\$12,621.03	2015	7/22/2015	SS001550214		0	OTHER THAN SMALL BUSINESS
FEDERAL PRISON INDUSTRIES INC	UNICOR FURNITURE FOR THE PHILADELPHIA REGION 9	\$12,523.29	\$12,523.29	2015	9/21/2015	SS001550303		0	OTHER THAN SMALL BUSINESS
TECHXTEND, INC.	RENEWAL OF SS00-15-50084 FOR MAINTENANCE OF INTEL PARALLEL STUDIO XE COMPOSER EDITION FOR FORTRAN F/WIN SSR SOFTWARE	\$12,509.55	\$12,509.55	2016	4/6/2016	SS001650097		0	OTHER THAN SMALL BUSINESS

Vendor Name	Description of Requirement	Action Obligation	Base and All Options Value	Fiscal Year	Date Signed	PO/Delivery Order/Task Order/Call#	Parent Contract	Mod #	Contracting Officers Business Size Selection
CONQUEST SYSTEMS, INC.	DATA-PLANET STATISTICAL DATASETS ANNUAL SUBSCRIPTION RENEWAL	\$12,500.00	\$12,500.00	2016	2/9/2016	SS001650066		0	SMALL BUSINESS
CONQUEST SYSTEMS, INC.	FY15 SUBSCRIPTION RENEWAL OF STATISTICAL DATASETS.	\$12,500.00	\$12,500.00	2015	3/16/2015	SS001550088		0	SMALL BUSINESS
NIELSEN COMPANY US LLC, THE	THE SSA OFFICE OF QUALITY IMPROVEMENT REQUIRES THE NIELSEN POP-FACTS DEMOGRAPHICS PREMIER&SUPPLEMENTAL FILE THAT REFLECTS 2015 CURRENT YEAR ESTIMATES AND 2020 5-YEAR PROJECTIONS TO INCORPORATE INTO THE GETSTATS APPLICATION.	\$12,500.00	\$12,500.00	2015	2/4/2015	SS001550073		0	OTHER THAN SMALL BUSINESS
NIELSEN COMPANY (US), LLC, THE	THE SSA OFFICE OF QUALITY IMPROVEMENT REQUIRES THE NIELSEN POP-FACTS DEMOGRAPHICS PREMIER&SUPPLEMENTAL FILE THAT REFLECTS 2016 CURRENT YEAR ESTIMATES AND 2021 5-YEAR PROJECTIONS TO INCORPORATE INTO THE GETSTATS APPLICATION.	\$12,500.00	\$12,500.00	2016	3/7/2016	SS001650079		0	OTHER THAN SMALL BUSINESS
RICHMOND SANITARY SERVICE, INC.	20 YD DUMPSTER GREEN FOR EXCESSING DISPOSAL - SEPTEMBER 25, 2016 TO SEPTEMBER 24, 2017 IGF::CT::IGF	\$12,417.99	\$12,417.99	2016	9/1/2016	SS091651015		0	OTHER THAN SMALL BUSINESS
SMARTER SECURITY, INC.	ENTRANCE THROUGH THE MAIN LOBBY OF THE RTP OFFICES ARE CONTROLLED BY ELECTRO-MECHANICAL TURNSTILES, OR MORE PROPERLY DESCRIBED AS FASTLANE GLASSGATES, BY THEIR MANUFACTURER, INTEGRATED DESIGN LIMITED AND THEIR DISTRIBUTOR, SMARTER SECURITY, INC. THE GLASSGATES ARE NO LONGER UNDER WARRANTY AND HAVE BEEN IN OPERATION FOR OVER FIVE YEARS. THERE IS A HIGH VOLUME OF FOOT TRAFFIC THROUGH THESE GLASSGATES, AND SHOULD THERE BE FAILURES WITHOUT HAVING SPARE PARTS, THIS WOULD BE A MAJOR DISRUPTION IN VETTING EMPLOYEES, CONTRACTORS AND VISITORS TRYING TO GET TO WORK. IT IS HIGHLY RECCOMENDED TO HAVE SPARE PARTS AVAILABLE ON-SITE FOR TIMES OF NEED AND IT IS IMPERATIVE THAT THE PARTS ARE CORRECT AND HAVE THE PROPER FIRMWARE INSTALLED OR THEY MAY NOT WORK.	\$12,413.00	\$12,413.00	2015	5/11/2015	SS001550137		0	SMALL BUSINESS
TECHNICAL INNOVATION, LLC	SOUND EMITTERS NEEDED TO CONTROL SOUND LEVELS WITHIN OFFICE AREAS. IGF::OT::IGF	\$12,410.61	\$12,410.61	2016	5/10/2016	SS041650007		0	OTHER THAN SMALL BUSINESS
DALLAS LIGHTHOUSE FOR THE BLIND, INC.	CHANGE CONTRACTING OFFICER REPRESENTATIVE	\$12,352.00	\$12,352.00	2015	5/1/2015	SS061060013		14	SMALL BUSINESS
HERMAN MILLER, INC.	GREENVILLE, SC CX48 - DESIGN, PRODUCT AND INSTALLATION FOR SYSTEMS FURNITURE	\$12,324.00	\$12,324.00	2015	2/23/2015	SS001530287	SS001260003	0	OTHER THAN SMALL BUSINESS
SHI INTERNATIONAL CORP.	RENEWAL OF SS00-14-51107 FOR MAINTENANCE OF PROGRAMMER PARADISES, VISUAL FORTRAN COMPOSER XE F/WIN SSR SOFTWARE.	\$12,154.95	\$12,154.95	2015	3/2/2015	SS001550084		0	OTHER THAN SMALL BUSINESS
NATIONAL ASSOCIATION FOR PUBLIC HEALTH STATISTICS AND INFORM	IGF::OT::IGF TECHNICAL ASSISTANCE AND TESTING OF STATE ELECTRONIC DEATH REGISTRATION SYSTEMS (EDRS). TASK 2 FOR THE STATE OF NORTH CAROLINA TASK 3 FOR THE STATE OF NEW MEXICO	\$12,088.00	\$12,088.00	2016	4/12/2016	SS001630297	SS001660002	0	OTHER THAN SMALL BUSINESS
HERMAN MILLER, INC.	SYSTEMS FURNITURE CONTRACT - TO PAY CLAIMS UNDER THIS CONTRACT.	\$12,036.66	\$12,036.66	2016	4/20/2016	SS001260003		35	OTHER THAN SMALL BUSINESS
UNITED STATES POSTAL SERVICE	THE PURPOSE OF THIS AWARD IS TO RENEW WILKES BARRE PA POST OFFICES USED TO SORT INBOUND MAIL BY COMPONENT. POST OFFICE BOXES ARE TO RENEWED BY PERIOD OF PERFORMANCE- 5/1/2016-4/30/2017. IGF::CL::IGF	\$11,988.00	\$11,988.00	2016	3/23/2016	SS031650002		0	OTHER THAN SMALL BUSINESS
SPECIAL SERVICES GROUP, LLC	COVERT DVR RECORDING SYSTEM FOR THE DALLAS CDI UNIT.	\$11,961.43	\$11,961.43	2015	9/8/2015	SS061550006		0	SMALL BUSINESS
METALOGIX SOFTWARE US INC.	RENEW MAINTENANCE ON AXCELER CONTROL POINT SOFTWARE W/ METALOGIX SOFTWARE US, INC.	\$11,829.83	\$11,829.83	2015	6/3/2015	SS001550149		0	OTHER THAN SMALL BUSINESS
WELDON, WILLIAMS & LICK, INC.	SSA PARKING PERMIT HANG-TAGS THAT WILL BE ISSUED TO ALL SSA EMPLOYEES AND CONTRACTORS THAT PARK ON SSA PROPERTY.	\$11,800.00	\$11,800.00	2015	6/15/2015	SS001550173		0	SMALL BUSINESS
HERMAN MILLER, INC.	CHARLOTTE, NC ODAR #RT27 DESIGN, INSTALLATION, ODAR ADDITIONAL HOURS AND PRODUCT FOR SYSTEMS FURNITURE	\$11,705.54	\$11,705.54	2015	7/17/2015	SS001530077	SS001260003	1	OTHER THAN SMALL BUSINESS

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RICHMOND SANITARY SERVICE, INC.	20 YD DUMPSTER GREEN FOR EXCESSING DISPOSAL IGF::OT::IGF	\$11,688.51	\$11,688.51	2015	7/10/2015	SS091551012		0	OTHER THAN SMALL BUSINESS
ADMIRAL ELEVATOR COMPANY, INC.	REMOVE AND REPLACE CARPETS TILES ON THE FIFTH FLOOR OF THE EAST HIGH RISE (EHR) AT HEADQUARTERS IN WOODLAWN, MD. IGF::OT::IGF	\$11,636.67	\$11,636.67	2015	7/9/2015	SS001530706	SS001060042	0	SMALL BUSINESS
UNITED STATES POSTAL SERVICE	THE PURPOSE OF THIS MODIFICATION IS CHANGE THE METHOD OF PAYMENT FROM PURCHASE CARD TO INVOICE IGF::CL::IGF	\$11,520.00	\$11,520.00	2016	4/27/2016	SS031650002		3	OTHER THAN SMALL BUSINESS
HERMAN MILLER, INC.	PUYALLUP, WA -DESIGN, INSTALLATION AND PRODUCT TO RECONFIGURE ONE X-3 WORKSTATION INTO AN MB WORKSTATION FOR SYSTEMS FURNITURE	\$11,340.24	\$11,340.24	2016	6/6/2016	SS001630426	SS001260003	0	OTHER THAN SMALL BUSINESS
EC AMERICA, INC.	CITRIX XENAPP RENEWAL OF MAINTENANCE	\$11,250.00	\$11,250.00	2016	7/26/2016	SS001650190		0	OTHER THAN SMALL BUSINESS
HERMAN MILLER, INC.	SAN ANGELO TX DO #X822 TO ADD 1 J-11 WORKSTATION FOR SYSTEMS FURNITURE	\$11,244.84	\$11,244.84	2016	5/2/2016	SS001630349	SS001260003	0	OTHER THAN SMALL BUSINESS
HERMAN MILLER, INC.	CONWAY, SC X592 DESIGN, INSTALLATION AND PRODUCT - SYSTEMS FURNITURE.	\$11,208.35	\$11,208.35	2015	5/29/2015	SS001530549	SS001260003	0	OTHER THAN SMALL BUSINESS
HERMAN MILLER, INC.	PUEBLO, CO C883 - DESIGN, PRODUCT, AND INSTALLATION TO RECONFIGURE AN X3 WORKSTATION TO A MA WORKSTATION FOR SYSTEMS FURNITURE.	\$11,208.35	\$11,208.35	2015	3/30/2015	SS001530354	SS001260003	0	OTHER THAN SMALL BUSINESS
MLM, INC.	VENDOR WILL PROVIDE ONE GRANITE MONUMENT AND FIVE GRANITE BENCHES WITH ARMED SERVICES INSIGNIAS. VENDOR TO USE IS: RAYMOND G. MERKLE MEMORIALS. THIS VENDOR SUPPLIES SSA WITH ALL MONUMENTS AND STONE PLAQUES.	\$11,205.00	\$11,205.00	2016	12/30/2015	SS001650051		0	SMALL BUSINESS
MARBLE COMPUTER INCORPORATED	MAINTAIN MARBLE COMPUTER INC. DCD IV SOFTWARE	\$11,138.00	\$11,138.00	2016	11/10/2015	SS001650025		0	SMALL BUSINESS
MARBLE COMPUTER INCORPORATED	MAINTENANCE ON MARBLE DCD IV	\$11,138.00	\$11,138.00	2017	11/21/2016	SS001750026		0	SMALL BUSINESS
HERMAN MILLER, INC.	MERRILLVILLE, IN DO #CD61 - DESIGN, INSTALLATION AND PRODUCT ESTIMATE FOR SYSTEMS FURNITURE	\$11,094.59	\$11,094.59	2016	2/22/2016	SS001630200	SS001260003	0	OTHER THAN SMALL BUSINESS
COMCAST OF MARYLAND LIMITED PARTNERSHIP	IGF::OT::IGF BUSINESS BROADBAND INTERNET AND A SPORTS AND ENTERTAINMENT CABLE TV PACKAGE IS NEEDED FOR THE WOODLAWN FITNESS CENTER.	\$5,567.66	\$11,086.32	2015	7/7/2015	SS001550185		0	OTHER THAN SMALL BUSINESS
TECHFIRST, INC.	IGF::CT::IGF SIGN LANGUAGE INTERPRETER SERVICES AS A REASONABLE ACCOMMODATION FOR EMPLOYEES WHO ARE DEAF OR HARD OF HEARING	\$11,084.80	\$11,084.80	2017	11/29/2016	SS001650271		1	SMALL BUSINESS
HERMAN MILLER, INC.	PONCE, PR DO #CA272PRODUCT FOR RECONFIGURATION FOR SYSTEMS FURNITURE	\$11,040.59	\$11,040.59	2016	1/12/2016	SS001630134	SS001260003	0	OTHER THAN SMALL BUSINESS
WELCH CONSULTING, LTD	IGF::CT::IGF - EXPERT WITNESS SERVICES TO PROVIDE ASSISTANCE FOR CLASS ACTION CASES	\$10,900.00	\$10,900.00	2015	3/9/2015	SS001461104		1	OTHER THAN SMALL BUSINESS
HENSEL PHELPS SERVICES LLC	IGF::CT::IGF	\$10,895.00	\$10,895.00	2016	12/10/2015	SS001630087	SS001461106	0	OTHER THAN SMALL BUSINESS
INSIGHT PUBLIC SECTOR, INC.	ASPOSE.WORDS FOR JAVA SUBSCRIPTION LICENSE ( 1 YEAR ) - UP TO 10 DEVELOPERS - WIN E-DOWNLOAD SUBSCRIPTION	\$10,885.19	\$10,885.19	2015	4/15/2015	SS001550114		0	OTHER THAN SMALL BUSINESS
PESTROL, INC.	PEST CONTROL - BEDBUG TREATMENT STEAM, VACUUM, CHEMICAL TREATMENT OF 11 CUBICLES APPROXIMATELY 2200SF. FOUR TREATMENTS, ONE ON EACH SUCCESSIVE WEEKEND SHALL BE PERFORMED. TWO FOLLOW UP CANINE INSPECTIONS OF THE AREA AND BAGGED ITEMS WILL ALSO BE INCLUDED IN THIS REQUISITION. IGF::CT::IGF	\$10,857.60	\$10,857.60	2016	9/9/2016	SS021650007		0	SMALL BUSINESS
DATABANK IMX LLC	RENEW MAINTENANCE ON ONBASE SOFTWARE	\$10,735.92	\$10,735.92	2017	10/5/2016	SS001750008		0	OTHER THAN SMALL BUSINESS
HERMAN MILLER, INC.	ST. TAMMANY, LA #BD18 - DESIGN, INSTALLATION AND PRODUCT ESTIMATE FOR SYSTEMS FURNITURE	\$10,706.64	\$10,706.64	2016	6/15/2016	SS001630469	SS001260003	0	OTHER THAN SMALL BUSINESS
HERMAN MILLER, INC.	RAPID CITY, SD #A717 ADD ONE WORKSTATION - SYSTEMS FURNITURE	\$10,643.54	\$10,643.54	2016	8/19/2016	SS001630685	SS001260003	0	OTHER THAN SMALL BUSINESS
ADMIRAL ELEVATOR COMPANY, INC.	IGF::OT::IGF  TASK ORDER #47 SS00-15-30668  TO REMOVE AND REPLACE CARPET IN THE ANNEX CAFE SEATING AREA.	\$10,580.82	\$10,580.82	2015	7/9/2015	SS001530668	SS001060042	0	SMALL BUSINESS

Vendor Name	Description of Requirement	Action Obligation	Base and All Options Value	Fiscal Year	Date Signed	PO/Delivery Order/Task Order/Call#	Parent Contract	Mod #	Contracting Officers Business Size Selection
TECHFIRST, INC.	IGF::CT::IGF SIGN LANGUAGE INTERPRETER SERVICES NEEDED AS A REASONABLE ACCOMMODATION FOR AN EMPLOYEE WHO IS DEAF OR HARD OF HEARING	\$10,439.10	\$10,439.10	2016	9/27/2016	SS001650200		1	SMALL BUSINESS
HERMAN MILLER, INC.	FT. SMITH, AR ODAR OFFICE, SITE CODE #XX55 1 EE-11 WORKSTATION FOR SYSTEMS FURNITURE	\$10,362.15	\$10,362.15	2016	11/10/2015	SS001630057	SS001260003	0	OTHER THAN SMALL BUSINESS
SABREE, INC.	IGF::OT::IGF ASBESTOS REMOVAL CAGE CODE: 4KUQ1  REMOVE APPROXIMATELY 550 SQUARE FEET OF CARPET TILE AND CARPET TILE AND REPLACE APPROXIMATELY 140 SQUARE FEET OF GOVERNMENT SUPPLIED FLOOR TILE IN THE ALTMAYER BUILDING, ROOMS 518, 520, 522	\$10,170.11	\$10,170.11	2015	12/23/2014	SS001530161	SS001461113	0	SMALL BUSINESS
FEDERAL KEY LLC	KEY CONTROL SECURITY AND ACCESS INVENTORY SYSTEM ANNUAL SUPPORT AGREEMENT AND EQUIPMENT/SYSTEM UPGRADES, CURRENT SYSTEM IS OBSOLETE AND REQUIRES EQUIPMENT REPLACEMENT AND ADDITIONAL MANUFACTURER SUPPORT.	\$10,155.00	\$10,155.00	2016	2/10/2016	SS051650001		0	SMALL BUSINESS
OPTUMINSIGHT, INC.	IGF::CT::IGF ENCODERPRO SOLUTION (OPTUM) PROVIDES ACCESS TO THE ICD-9, ICD-10-CM AND PCS, CPT AND HCPCS CODES ALONG WITH CCI EDITS TO VIEW POTENTIAL BUNDLING ISSUES, LOCAL AND NATIONAL COVERAGE DETERMINATION POLICIES, CROSSWALKS FROM CPT AND HCPCS CODES TO RESPECTIVE MODIFIERS, AND IOM.PUB-100 REFERENCES	\$10,080.00	\$10,080.00	2016	8/5/2016	SS001650205		0	SMALL BUSINESS
LYNDA.COM, INC.	IGF::OT::IGF LYNDA.COM - 100 ENTERPRISE LICENSES FOR OCOMM	\$10,000.00	\$10,000.00	2016	5/5/2016	SS001650115		0	SMALL BUSINESS
MCS SERVICES, INC.	IGF::CT::IGF MODIFICATION TO SS00-14-51002 TO PROVIDE ADDITIONAL FUNDING FOR CLIN 0004 (USAGE CLICKS).	\$9,956.82	\$9,956.82	2015	4/28/2015	SS001451002		2	SMALL BUSINESS
CONVERGINT TECHNOLOGIES LLC	IGF::CT::IGF SECURITY TURNSTILE MOTOR REPLACEMENT	\$9,956.37	\$9,956.37	2016	5/26/2016	SS051650006		0	SMALL BUSINESS
TEAMSTUDIO, INC.	MAINTENANCE ON TEAM STUDIO RENEWAL OF SS00-15-50082.	\$9,915.00	\$9,915.00	2016	3/22/2016	SS001650087		0	OTHER THAN SMALL BUSINESS
TEAMSTUDIO, INC.	RENEWAL OF PURCHASE ORDER SS00-14-51105 WITH TEAMSTUDIO, INC.  MAINTENANCE ON TEAM STUDIO SW MAINTENANCE IS NO LONGER REQUIRED ON THE FOLLOWING SOFTWARE AND PRIOR CLINS: TEAMSTUDIO CONFIGURATOR (CLIN 0003) TEAMSTUDIO UNDO (CLIN 0005) TEAMSTUDIO VALIDATOR (CLIN 0006)	\$9,915.00	\$9,915.00	2015	3/3/2015	SS001550082		0	OTHER THAN SMALL BUSINESS
DAYTNER CORPORATION, THE	DAYTNER CONSTRUCTION GROUP TO PROVIDE EMERGENCY SERVICES TO REPLACE COOLING TOWER CELL #2 GEARBOX TRANSMISSION AND ASSOCIATED COMPONENTS.  IGF::OT::IGF	\$9,899.27	\$9,899.27	2015	9/30/2015	SS001550294		0	SMALL BUSINESS
FISCHER INTERNATIONAL SYSTEMS CORP	RENEWAL OF MAINTENANCE ON TAO SOFTWARE (SS00-15-50020) WITH FISCHER INTERNATIONAL SYSTEMS	\$9,875.00	\$9,875.00	2016	10/19/2015	SS001650016		0	SMALL BUSINESS
SCOTT DAVID T	DAVID SCOTT, MC, REG. 10 ADDING CASES AND FUNDING IGF::CL::IGF CLOSELY ASSOCIATED	\$9,840.00	\$9,840.00	2016	1/13/2016		1 SS10154C009	1	SMALL BUSINESS
NIKSUN INC.	NIKSUN PHONESWEEP MAINTENANCE RENEWAL	\$9,704.01	\$9,704.01	2016	4/22/2016	SS001650109		0	OTHER THAN SMALL BUSINESS
NIKSUN INC.	SANDSTORM PHONESWEEP SOFTWARE	\$9,704.00	\$9,704.00	2015	3/16/2015	SS001550079		0	SMALL BUSINESS
LEADERSHIP DIRECTORIES, INC.	ANNUAL SUBSCRIPTION RENEWAL FOR CONGRESSIONAL AND FEDERAL YELLOW BOOKS	\$9,674.00	\$9,674.00	2016	6/9/2016	SS001650155		0	OTHER THAN SMALL BUSINESS
HENSEL PHELPS SERVICES LLC	IGF::CT::IGF	\$9,673.00	\$9,673.00	2016	1/6/2016	SS001630120	SS001461106	0	OTHER THAN SMALL BUSINESS
MSDSPRO, LLC	IGF::CT::IGF MODIFICATION TO EXTEND SERVICES FOR 120 DAYS AND OBLIGATE ADDITIONAL FUNDING.	\$9,640.00	\$9,640.00	2015	6/10/2015	SS001550016		3	SMALL BUSINESS
HERMAN MILLER, INC.	LEESBURG, FL A258 DESIGN, PRODUCT AND INSTALLATION FOR SYSTEMS FURNITURE	\$9,593.35	\$9,593.35	2016	6/16/2016	SS001630470	SS001260003	0	OTHER THAN SMALL BUSINESS
HERMAN MILLER, INC.	LAKE CHARLES LA #B805 RECONFIGURE WORKSTATION (REPLACE 1 EXISTING X3-95 WITH (1) MA-11 WORKSTATION FOR SYSTEMS FURNITURE	\$9,506.35	\$9,506.35	2015	3/27/2015	SS001530348	SS001260003	0	OTHER THAN SMALL BUSINESS



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HERMAN MILLER, INC.	MONROE LA #B8021 - ADDITIONAL MA-01 WORKSTATION IS REQUIRED - SYSTEMS FURNITURE.	\$9,506.35	\$9,506.35	2015	5/29/2015	SS001530548	SS001260003	0	OTHER THAN SMALL BUSINESS
HERMAN MILLER, INC.	VENICE, FL XA14 DESIGN, INSTALLATION AND PRODUCT FOR SYSTEMS FURNITURE	\$9,506.35	\$9,506.35	2016	1/11/2016	SS001630137	SS001260003	0	OTHER THAN SMALL BUSINESS
AMERICAN SOCIETY FOR TRAINING AND DEVELOPMENT, INCORPORATED	IGF::OT::IGF ATD FORUM MEMBERSHIP RENEWAL	\$9,500.00	\$9,500.00	2015	7/3/2015	SS001550205		0	OTHER THAN SMALL BUSINESS
AMERICAN SOCIETY FOR TRAINING AND DEVELOPMENT, INCORPORATED	IGF::OT::IGF OTHER FUNCTION ASSOCIATION FOR TALENT DEVELOPMENT(ATD), FORMERLY THE AMERICAN SOCIETY FOR TRAINING AND DEVELOPMENT (ASTD), FORUM MEMBERSHIP RENEWAL.	\$9,500.00	\$9,500.00	2016	6/14/2016	SS001650151		0	OTHER THAN SMALL BUSINESS
HERMAN MILLER, INC.	LAGRANGE, GA C608 DESIGN, INSTALLATION AND PRODUCT FOR SYSTEMS FURNITURE	\$9,455.29	\$9,455.29	2017	10/28/2016	SS001730022	SS001260003	0	OTHER THAN SMALL BUSINESS
HERMAN MILLER, INC.	SACO, ME #AA24 - ADD ON MA-95 WORKSTATION - SYSTEMS FURNITURE	\$9,420.35	\$9,420.35	2015	1/5/2015	SS001530195	SS001260003	0	OTHER THAN SMALL BUSINESS
RSSI BARRIERS, LLC.	CRITICAL SPARE PARTS ARE NEEDED FOR THE ELECTRIC VEHICLE BARRIERS, WHICH ARE ANTI-TERRORISM MEASURES MANDATED BY FEDERAL STANDARDS, THAT PROTECT THE MAIN ENTRANCE TO ONE OF THE AGENCY S DATA CENTERS. THE BARRIERS ARE MEANT TO KEEP OUT ILL-INTENTIONED INDIVIDUALS MEANING TO DO HARM TO AGENCY PEOPLE AND ASSETS. SHOULD THE BARRIERS FAIL WITHOUT THE SPARE PARTS ON HAND, THIS WOULD DELAY REPAIRS AND POTENTIALLY PUT THE PEOPLE AND ASSETS AT RISK. THE MAIN PART NEEDED IS AN ELECTRIC ACTUATOR THAT RAISES AND LOWERS THE BARRIER. THE PARTS ARE CUSTOM DESIGNED BY THE ORIGINAL EQUIPMENT MANUFACTURER FOR THE VEHICLE BARRIERS AND SIMILAR PARTS MAY NOT WORK, FIT OR FUNCTION PROPERLY CAUSING ADDED TIME, COST AND MATERIALS TO BRING THE BARRIERS BACK TO FULL FUNCTIONALITY.	\$9,381.42	\$9,381.42	2015	4/21/2015	SS001550123		0	SMALL BUSINESS
LEADERSHIP DIRECTORIES, INC.	SUBSCRIPTION RENEWAL OF CONGRESSIONAL AND FEDERAL YELLOW BOOKS.	\$9,379.00	\$9,379.00	2015	7/6/2015	SS001550191		0	OTHER THAN SMALL BUSINESS
HELP/SYSTEMS, LLC	THE OFFICE OF TELECOMMUNICATIONS AND OPERATIONS SYSTEM REQUEST COMPLIANCE MONITOR - HARDWARE LPAR CHANGE FOR DISABILITY DETERMINATION SERVICES.	\$9,070.00	\$9,070.00	2015	5/11/2015	SS001550128		0	SMALL BUSINESS
TECHFIRST, INC.	IGF::CT::IGF SIGN LANGUAGE INTERPRETER SERVICES AS A REASONABLE ACCOMMODATION FOR EMPLOYEES WHO ARE DEAF OR HARD OF HEARING	\$8,998.52	\$8,998.52	2016	8/1/2016	SS001650214		0	SMALL BUSINESS
CONVEYOR HANDLING COMPANY, INC.	IGF::CT::IGF MODIFICATION TO EXISTING TRASH LINE IN SUPPLY BUILDING WAREHOUSE.	\$8,973.00	\$8,973.00	2016	2/19/2016	SS001650069		0	SMALL BUSINESS
UNITED STATES POSTAL SERVICE	IGF::CT::IGF RENEWAL OF PO BOXES AND CALL SERVICE FOR THE HWSSC. THIS ITEM MUST BE PAID FOR LOCALLY, AT THE POST OFFICE, IN PERSON.	\$8,908.00	\$8,908.00	2016	7/14/2016	SS051650008		0	OTHER THAN SMALL BUSINESS
UNITED STATES POSTAL SERVICE	IGF::CT::IGF RENEWAL OF PO BOXES AND CALL SERVICE FOR THE HWSSC. THIS ITEM MUST BE PAID FOR LOCALLY, AT THE POST OFFICE, IN PERSON.	\$8,908.00	\$8,908.00	2016	9/21/2016	SS051650008		2	OTHER THAN SMALL BUSINESS
L-SOFT SWEDEN AB	MAINTENANCE RENEWAL ON PURCHASE ORDER SS00-15-50017 WITH L-SOFT SWEDEN AB	\$8,800.00	\$8,800.00	2016	10/6/2015	SS001651009		0	OTHER THAN SMALL BUSINESS
L-SOFT SWEDEN AB	RENEWAL OF SS00-16-51009 FOR MAINTENANCE ON L-SOFT LISTSERV HPO UNLIMITED PERPETUAL LICENSE.	\$8,800.00	\$8,800.00	2017	10/25/2016	SS001750015		0	OTHER THAN SMALL BUSINESS
HERMAN MILLER, INC.	DUE TO UNION NEGOTIATIONS THE REGION IS REQUESTING A GLASS PANEL AT WORKSTATION #6 TO BE REMOVE WITH A SOLID PANEL AT THE MINEOLA, NY OFFICE - FOR SYSTEMS FURNITURE	\$8,750.78	\$8,750.78	2017	10/26/2016	SS001730019	SS001260003	0	OTHER THAN SMALL BUSINESS
MASSACHUSETTS MEDICAL SOCIETY	IGF::OT::IGF RENEWAL FOR NEW ENGLAND JOURNAL OF MEDICINE (NEJM)	\$8,750.00	\$8,750.00	2016	11/13/2015	SS001650028		0	OTHER THAN SMALL BUSINESS
THE ARC OF BALTIMORE INCORPORATED (1428)	IN SCOPE MOD TO REMOVE TREES	\$8,744.05	\$8,744.05	2015	2/25/2015	SS000860012		46	OTHER THAN SMALL BUSINESS
TELERIK INC.	TELERIK ULTIMATE DEVELOPER LICENSE	\$8,491.50	\$8,491.50	2015	3/11/2015	SS001550085		0	OTHER THAN SMALL BUSINESS
WHITAKER BROTHERS BUSINESS MACHINES INC	IGF::CT::IGF SERVICE LEVEL AGREEMENT - MAINTENANCE ON 17 BINDERY MACHINES IN DUPLICATING SERVICE CENTER	\$8,384.00	\$8,384.00	2016	9/6/2016	SS001650251		0	OTHER THAN SMALL BUSINESS
PCMG, INC.	THIS IS FOR THE PURCHASE OF PLUGINS TO ALIGN WITH STASH. THESE WILL BE USED AS PART OF THE AGILE IMPLEMENTATION AT THE AGENCY.	\$8,365.06	\$8,365.06	2015	9/21/2015	SS001550302		0	OTHER THAN SMALL BUSINESS

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HERMAN MILLER, INC.	ST GEORGE, UT RA07 DESIGN, INSTALL, ESTIMATED PRODUCT FOR OFFICE RELOCATION FOR SYSTEMS FURNITURE. MODIFICATION TO REDUCE PRODUCT.	\$8,332.50	\$8,332.50	2016	5/3/2016	SS001530355	SS001260003	3	OTHER THAN SMALL BUSINESS
HERBERT KUSHNER	DR. KUSHNER MODIFICATION TO ADD CASES SS00-11-40079 IGF::CT::IGF	\$8,200.00	\$8,200.00	2015	5/1/2015	6	SS001140079	1	SMALL BUSINESS
HAROLD E RAMSEY MD	DR. RAMSEY MODIFICATION TO ADD CASES SS00-11-40052 IGF::CT::IGF	\$8,200.00	\$8,200.00	2015	4/15/2015	5	SS001140052	1	SMALL BUSINESS
KANG CHANG-WUK MD PA	IGF::CT::IGF NEW CALL ORDER FOR BPA 6/1/2015 DR. KANG SS00-11-40086	\$8,200.00	\$8,200.00	2015	7/15/2015	8	SS001140086	1	SMALL BUSINESS
PRENTKE ROMICH COMPANY	IT SMALL PURCHASES IGF::OT::IGF	\$8,189.00	\$8,189.00	2015	4/14/2015	SS001550113		0	SMALL BUSINESS
SABREE, INC.	CAGE CODE: 4KUQ1  REMOVAL OF CARPET TILE/FLOOR TILE AND REPLACE OF FLOOR TILE PROVIDED BY THE GOVERNMENT IN ROOM G52 ALTMAYER BUILDING.  REMOVE APPROXIMATELY 295 SQUARE FEET OF CARPET TILE/FLOOR TILE. REPLACE APPROXIMATELY 74 SQUARE FEET OF FLOOR TILE PROVIDED BY THE GOVERNMENT.  THE CONTRACTOR WILL PROVIDE ALL LABOR, MATERIALS, EQUIPMENT, AND SUPERVISION TO REMOVE CARPET TILE IN ROOM G52 ALTMAYER BUILDING AND INSTALL GOVERNMENT PROVIDED FLOOR TILES REMOVED WHI.	\$8,050.31	\$8,050.31	2015	1/27/2015	SS001530233	SS001461113	0	SMALL BUSINESS
SUPERIOR COMMUNICATIONS, INC.	PURCHASE OF SIX XG-25 RADIOS	\$8,010.00	\$8,010.00	2015	9/24/2015	SS001550309		0	SMALL BUSINESS
HERMAN MILLER, INC.	JACKSONVILLE, FL IX41 PRODUCT AND INSTALLATION FOR SYSTEMS FURNITURE	\$7,996.00	\$7,996.00	2016	11/11/2015	SS001530759	SS001260003	1	OTHER THAN SMALL BUSINESS
UNITED STATES POSTAL SERVICE	RENEWAL OF WILKES BARRE DOC POST OFFICE BOXES TO SEPARATE TIME SENSITIVE MAIL FROM THE BULK MAIL. THE FOLLOWING WORKGROUP COMPONENTS ARE REPRESENTED. WBDOC WORKLOADS- REP PAYEE - PO BOXES 6231, 6237 MEDICARE - PO BOXES - 1080, 3600 SS STATEMENTS - PO BOX 7004 AWR, W2-C - PO BOX 3333 IGF::OT::IGF	\$7,992.00	\$7,992.00	2015	7/7/2015	SS031550017		0	OTHER THAN SMALL BUSINESS
AMERICAN MEDICAL ASSOCIATION	IGF::OT::IGF RENEWAL FOR JOURNAL OF THE AMERICAN MEDICAL ASSOCIATION (JAMA)	\$7,947.00	\$7,947.00	2016	12/29/2015	SS001650020		0	OTHER THAN SMALL BUSINESS
UNITED STATES POSTAL SERVICE	IGF::CT::IGF ANNUAL RENEWAL POST OFFICES BOXES	\$7,920.00	\$7,920.00	2015	8/2/2015	SS051550009		0	OTHER THAN SMALL BUSINESS
UNITED STATES POSTAL SERVICE	IGF::CT::IGF ANNUAL RENEWAL POST OFFICES BOXES	\$7,920.00	\$7,920.00	2016	10/7/2015	SS051550009		2	OTHER THAN SMALL BUSINESS
TECHFIRST, INC.	IGF::CT::IGF SIGN LANGUAGE INTERPRETER SERVICES AS A REASONABLE ACCOMMODATION FOR EMPLOYEES WHO ARE DEAF OR HARD OF HEARING	\$7,824.80	\$7,824.80	2016	9/29/2016	SS001650214		2	SMALL BUSINESS
PACIFIC GAS AND ELECTRIC COMPANY	PG&E WILL DISABLE OUTSIDE FEEDERS TO TRANSFORMERS AND THEN WILL OPEN FUSES TO PROVIDE VISUAL CONFIRMATION OF DISCONNECT. PG&E WILL BE NOTIFIED WHEN POWER IS TO BE RE-ENERGIZED TO THE BUILDING. IGF::CT::IGF	\$7,800.47	\$7,800.47	2016	9/30/2016	SS091651019		0	OTHER THAN SMALL BUSINESS
EDGE INFORMATION GROUP, INC	RENEW MAINTENANCE ON EDGE PORTFOLIO MAINFRAME SOFTWARE LICENSES.	\$7,800.00	\$7,800.00	2016	10/6/2015	SS001651008		0	SMALL BUSINESS
PITNEY BOWES INC.	PITNEY BOWS INK CARTRIDGE 787-1 INK UPTO 60,000 IMPRESSIONS	\$7,783.20	\$7,783.20	2016	8/4/2016	SS001650211		0	OTHER THAN SMALL BUSINESS
FEDERAL PRISON INDUSTRIES INC	UNICOR FURNITURE FOR THE PHILADELPHIA REGION 3	\$7,739.55	\$7,739.55	2015	9/17/2015	SS001550290		0	OTHER THAN SMALL BUSINESS

Sole Source Contracts excluding Medical Experts, Vocational Experts, Medical Consultants, Verbatim Hearing Recorders, and Birth Death Records  
(December 1, 2014 - December 1, 2016)

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AMERICAN MEDICAL ASSOCIATION	IGF::OT::IGF JOURNAL OF THE AMERICAN MEDICAL ASSOCIATION (JAMA) RENEWAL.	\$7,715.00	\$7,715.00	2015	12/18/2014	SS001550038		0	OTHER THAN SMALL BUSINESS
HENSEL PHELPS SERVICES LLC	VOIP PHONES IGF::CT::IGF	\$7,709.38	\$7,709.38	2015	7/10/2015	SS001530701	SS001461106	0	OTHER THAN SMALL BUSINESS
SABREE, INC.	IGF::OT::IGF - REMOVAL OF THE EXISTING CARPET TILE, VINYL ASBESTOS FLOOR TILE IN ROOMS 135 THROUGH 145 ALTMAYER BUILDING	\$7,695.76	\$7,695.76	2016	9/30/2016	SS001630860	SS001461113	0	SMALL BUSINESS
PITNEY BOWES INC.	PRINTER INK, PRINT HEAD, AND WEB WIPE CASSETTES	\$7,600.00	\$7,600.00	2015	1/8/2015	SS001550064		0	OTHER THAN SMALL BUSINESS
HERMAN MILLER, INC.	HATTIESBURG, MS CX79 PRODUCT AND INSTALLER HOURS FOR SYSTEMS FURNITURE	\$7,578.73	\$7,578.73	2016	11/10/2015	SS001630026	SS001260003	0	OTHER THAN SMALL BUSINESS
SPECTRUM SYSTEMS, LLC	RENEW MAINTENANCE FOR REDGATE SQL TOOLBELT SOFTWARE. SS00-14-51246. RENEWAL OF SS00-14-51246 FOR MAINTENANCE ON RED GATE SQL TOOLBELT SOFTWARE.	\$7,527.52	\$7,527.52	2015	5/12/2015	SS001550144		0	SMALL BUSINESS
SHI INTERNATIONAL CORP.	MAINTENANCE OF JPDFPROCESS SITE LICENSE INCLUDES 24/7/365 SUBSCRIPTION TO UPDATES, UPGRADES AND FIXES.	\$7,524.00	\$7,524.00	2016	4/5/2016	SS001650098		0	OTHER THAN SMALL BUSINESS
DBE SOFTWARE INC	RENEW MAINTENANCE ON DB-EXAMINER FOR ORACLE.	\$7,500.00	\$7,500.00	2016	11/19/2015	SS001650030		0	OTHER THAN SMALL BUSINESS
EATON CORPORATION	IGF::OT::IGF POWER DOWN THEN POWER UP AGAIN THE NATIONAL COMPUTER CENTER'S UPS SYSTEM.	\$7,480.00	\$7,480.00	2016	9/29/2016	SS001630857	SS001560064	0	OTHER THAN SMALL BUSINESS
TECHFIRST, INC.	IGF::CT::IGF SIGN LANGUAGE INTERPRETER SERVICES AS A REASONABLE ACCOMMODATION FOR AN EMPLOYEE WHO IS DEAF OR HARD OF HEARING	\$7,456.50	\$7,456.50	2016	9/27/2016	SS001650255		1	SMALL BUSINESS
ZONES, INC.	RED GATE SQL TOOLBELT	\$7,449.96	\$7,449.96	2016	6/8/2016	SS001650153		0	OTHER THAN SMALL BUSINESS
FEDERAL PRISON INDUSTRIES INC	PURCHASE UNICOR FURNITURE AS A SOLE SOURCE VENDOR FOR TWO NEW SENIOR SSA/OGC ATTORNEYS.	\$7,377.00	\$7,377.00	2015	8/5/2015	SS051550010		0	OTHER THAN SMALL BUSINESS
SOFTCHOICE CORPORATION	EASYSOFT OBDDBC-SQL SVR DRVR UNL LIC	\$7,375.16	\$7,375.16	2015	6/8/2015	SS001550155		0	OTHER THAN SMALL BUSINESS
SHI INTERNATIONAL CORP.	INTRANET SMALL PURCHASES - REPLIWEB LICENSES	\$7,302.34	\$7,302.34	2015	7/30/2015	SS001550229		0	OTHER THAN SMALL BUSINESS
HENSEL PHELPS SERVICES LLC	IGF::OT::IGF  TASK THE O&M CONTRACTOR TO REPLACE AND REPAIR CONDENSER PUMP #7	\$7,191.60	\$7,191.60	2016	5/4/2016	SS001630322	SS001461106	0	OTHER THAN SMALL BUSINESS
RAPID MODELING CORPORATION	RENEWAL OF SS00-15-50216, MAINTENANCE ON LAUBRASS UMT PLUS MASTER	\$7,178.40	\$7,178.40	2016	5/3/2016	SS001650118		0	SMALL BUSINESS
BACKBONE SOLUTIONS, INC.	EMC PIX TOOLS DEV KIT SOFTWARE AND MAINTENANCE.	\$7,140.00	\$7,140.00	2015	5/7/2015	SS001550112		0	SMALL BUSINESS
HERMAN MILLER, INC.	THOUSAND OAKS, CA AA09 - DESIGN, INSTALLATION AND PRODUCT FOR SYSTEMS FURNITURE.	\$7,104.35	\$7,104.35	2015	1/6/2015	SS001431686	SS001260003	1	OTHER THAN SMALL BUSINESS
HERMAN MILLER, INC.	NEW YORK DO #B95, NY - REPLACEMENT OF SEVEN (7) TABLE BASES OUT OF WARRANTY FOR SYSTEMS FURNITURE.	\$7,042.26	\$7,042.26	2016	1/11/2016	SS001630135	SS001260003	0	OTHER THAN SMALL BUSINESS
HERMAN MILLER, INC.	BLUEFIELD WV #G311 DESIGN, INSTALLATION SERVICES AND PRODUCT FOR SYSTEMS FURNITURE - MODIFICATION TO ADD DESIGN SERVICES RENDERED	\$7,028.00	\$7,028.00	2016	8/19/2016	SS001530737	SS001260003	2	OTHER THAN SMALL BUSINESS
OPEN SOFTWARE TECHNOLOGIES INC	RENEW MAINTENANCE ON REXXTOOLS/MVS SOFTWARE.	\$6,988.00	\$6,988.00	2016	10/6/2015	SS001651007		0	SMALL BUSINESS
SABREE, INC.	IGF::OT::IGF CAGE CODE: 4KUQ1  REMOVE APPROXIMATELY 242 SQUARE FEET OF CARPET TILE/FLOOR TILE IN ROOM 513 OF THE ALTMAYER BUILDING. CONTRACTOR WILL REPLACE APPROXIMATELY 60 SQUARE FEET OF FLOOR TILE PROVIDED BY THE GOVERNMENT.	\$6,940.23	\$6,940.23	2015	1/2/2015	SS001530162	SS001461113	0	SMALL BUSINESS
HERMAN MILLER, INC.	PRESCOTT, AZ #1909 - REINSTALL 5 WORKSTATIONS TAKEN DOWN IN A FLOODING EMERGENCY, NO PRODUCT NEEDED. FOR SYSTEMS FURNITURE.	\$6,935.00	\$6,935.00	2017	11/21/2016	SS001730039	SS001260003	0	OTHER THAN SMALL BUSINESS
ELECTRONIC SECURITY SOLUTIONS LLC	IGF::OT::IGF RATIFICATION REQUEST FOR PAYMENT OF CCTV SECURITY MONITOR INSTALLATION SERVICES FOR THE SOUTH JERSEY HEARING OFFICE.	\$6,900.00	\$6,900.00	2015	1/14/2015	SS021550002		0	SMALL BUSINESS
COMCAST OF MARYLAND LIMITED PARTNERSHIP	IGF::OT::IGF BUSINESS BROADBAND INTERNET AND A SPORTS AND ENTERTAINMENT CABLE TV PACKAGE IS NEEDED FOR THE WOODLAWN FITNESS CENTER.	\$6,836.28	\$6,836.28	2016	9/7/2016	SS001550185		2	OTHER THAN SMALL BUSINESS

Vendor Name	Description of Requirement	Action Obligation	Base and All Options Value	Fiscal Year	Date Signed	PO/Delivery Order/Task Order/Call#	Parent Contract	Mod #	Contracting Officers Business Size Selection
KELLY MD, JAMES M	BPA#SS09-11-40011/DR. KELLY: THIS CALL ORDER IS TO ADD 80 CASES @ \$81.70 PER CASE FOR A TOTAL COST OF \$6,536.00 AND 1.5 NON-CASE HOURS @ \$92.30 PER HOUR FOR A TOTAL COST OF \$138.45. THE TOTAL COST FOR THIS CALL ORDER IS \$6,674.45 FOR THE PERIOD OF PERFORMANCE 11/25/2015 THROUGH 02/29/2016. IGF::CL::IGF	\$6,674.45	\$6,674.45	2016	12/31/2015	10	SS091140011	0	SMALL BUSINESS
HENSEL PHELPS SERVICES LLC	IGF::OT::IGF INSTALL A PROVIDED KEY BOX IN THE SECURITY CONTROL ROOM AND SUPPLY AND INSTALL ELECTRICAL WHIPS FOR CUBICIALS OUTSIDE OF THE SECURITY CONTROL ROOM.	\$6,618.00	\$6,618.00	2015	6/8/2015	SS001530523	SS001461106	0	OTHER THAN SMALL BUSINESS
AI INTERNET SOLUTIONS LLC	6MAINTAIN CSE HTML VALIDATOR PRO SOFTWARE	\$6,399.00	\$6,399.00	2015	6/11/2015	SS001550165		0	SMALL BUSINESS
SIGNET TECHNOLOGIES, INC.	IGF::CT::IGF MAINTAIN SECURITY SYSTEM AND ASSOCITED COMPONENTS LOCATED AT OFFICE OF DISABILITY ADJUDICATION AND REVIEW IN ARLINGTON, VIRGINIA 22202.	\$6,371.00	\$6,371.00	2015	1/13/2015	SS001550062		0	SMALL BUSINESS
GSA, HEARTLAND FINANCE CENTER 6BC	BSCC - OFFICE SUPPLIES	\$6,321.37	\$6,321.37	2015	6/4/2015	SS041550030		0	OTHER THAN SMALL BUSINESS
HPI/GSA - 2B, L.P.	IGF::OT::IGF - OTHER FUNCTIONS  DAYTIME CLEANING SERVICES	\$6,318.98	\$6,318.98	2015	3/13/2015	SS061452002		1	OTHER THAN SMALL BUSINESS
BARRATT EDWARDS INTERNATIONAL CORPORATION	RENEWAL OF MAINTENANCE ON ULTRABAC BACKUP RECOVERY SOFTWARE FOR THE PERIOD OF PERFORMANCE FROM OCTOBER 1, 2016 THROUGH MARCH 31, 2017.	\$6,300.00	\$6,300.00	2017	10/1/2016	SS001750003		0	SMALL BUSINESS
STRONG CRYPTO INNOVATIONS LLC	MAINTENANCE ON NETSPARKER PROFESSIONAL	\$6,256.00	\$6,256.00	2016	2/18/2016	SS001650070		0	SMALL BUSINESS
NORCON COMMUNICATIONS INC	PURCHASE WIRELESS HEADSETS TO USE WITH THE NORCON UNITS AT OUR NORTHEASTERN PROGRAM SERVICE CENTER. THESE WIRELESS HEADSETS WOULD FACILITATE COMMUNICATION BETWEEN OUR EMPLOYEES AND CLIENTS.	\$6,220.00	\$6,220.00	2016	9/15/2016	SS021650036		0	SMALL BUSINESS
KANG CHANG-WUK MD PA	IGF::CT::IGF MEDICAL SERVICE CONSULTANT DR. KANG SS00-11-40086	\$6,150.00	\$6,150.00	2016	2/17/2016	8	SS001140086	3	SMALL BUSINESS
NATIONAL ASSOCIATION FOR PUBLIC HEALTH STATISTICS AND INFORM	IGF::OT::IGF ISSUANCE OF TASK 3 FOR THE STATE OF TENNESSEE	\$6,102.00	\$6,102.00	2016	7/7/2016	SS001630517	SS001660002	0	OTHER THAN SMALL BUSINESS
NATIONAL ASSOCIATION FOR PUBLIC HEALTH STATISTICS AND INFORM	IGF::OT::IGF TECHNICAL ASSISTANCE AND TESTING OF STATE ELECTRONIC DEATH REGISTRATION SYSTEMS (EDRS).	\$6,102.00	\$6,102.00	2016	8/5/2016	SS001630638	SS001660002	0	OTHER THAN SMALL BUSINESS
ALLIED PUMP CORP	PURCHASE TWO ALLIED 25A VERTICAL SUMP PUMP 1/2 HP, 3/60/208/1725 WASH DOWN MOTOR ON 14" ROUND SUPPORT PLATE WITH DUPLEX CONTROL PANEL NEMA 4.	\$6,100.00	\$6,100.00	2015	1/5/2015	SS001550055		0	SMALL BUSINESS
TACTICAL TECHNOLOGIES, INC.	SMALL PLAN REGION 2 - PURCHASE PORTABLE SURVEILLANCE EQUIPMENT FOR REGION 2 OFFICE OF INVESTIGATIONS.	\$6,058.00	\$6,058.00	2015	8/24/2015	SS021550009		0	SMALL BUSINESS
FEDERAL PRISON INDUSTRIES INC	PURCHASE HEARING OFFICE FURNITURE FOR EVANSVILLE INDIANA	\$6,044.38	\$6,044.38	2016	7/18/2016	SS051650010		0	OTHER THAN SMALL BUSINESS
MASSACHUSETTS MEDICAL SOCIETY	IGF::OT::IGF RENEWAL FOR NEW ENGLAND JOURNAL OF MEDICINE (NEJM) SUBSCRIPTION	\$6,000.00	\$6,000.00	2017	11/2/2016	SS001750017		0	OTHER THAN SMALL BUSINESS
CURTIS ENGINE & EQUIPMENT, INC.	IGF::OT::IGF EMERGENCY GENERATOR&FIRE PUMP REPAIRS	\$5,937.71	\$5,937.71	2015	7/18/2015	SS001550220		0	OTHER THAN SMALL BUSINESS
NATIONAL ASSOCIATION FOR PUBLIC HEALTH STATISTICS AND INFORM	IGF::OT::IGF RATIFICATION OF UNAUTHORIZED COMMITMENT -- NAPHSIS PERFORMANCE OF TASK 3 (INTEGRATION OF ONLINE VERIFICATION SOFTWARE (OVS) AND TESTING OF THE FACT OF DEATH FILE) WITHOUT TASK ORDER AWARD. REPORT DELIVERABLE RECEIVED AND ACCEPTED.								
REEMA CONSULTING SERVICES, INC.	CONTRACT #SS00-10-60114 SSOS-09-60015 DBOPC - PRINT MAIL FACILITY TASK	\$5,923.20	\$5,923.20	2016	9/6/2016	SS001630730	SS001060114	0	OTHER THAN SMALL BUSINESS
PROCESSMODEL, INC.	RENEWAL OF SS00-14-51282 FOR MAINTENANCE ON PROCESS MODEL PROFESSIONAL SOFTWARE.	\$5,875.79	\$5,875.79	2015	7/27/2015	SS001160015		17	SMALL BUSINESS
		\$5,849.25	\$5,849.25	2015	7/9/2015	SS001550199		0	SMALL BUSINESS

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FUTURENET SECURITY SOLUTIONS, LLC	GRAB BARRIER EMERGENCY REPAIR IGF::CT::IGF	\$5,819.00	\$5,819.00	2015	7/20/2015	SS091551016		0	OTHER THAN SMALL BUSINESS
HENSEL PHELPS SERVICES LLC	IGF::OT::IGF PDTM INVESTIGATION AND REPAIR	\$5,700.94	\$5,700.94	2016	9/29/2016	SS001630372	SS001461106	0	OTHER THAN SMALL BUSINESS
MIRANDA ELECTRICAL SERVICE	PERFORM PREVENTATIVE MAINTENANCE ON MAIN ELECTRICAL SWITCHGEAR AT THE FRANK HAGEL FEDERAL BUILDING ON SATURDAY, OCTOBER 8, 2016. IGF::CT::IGF	\$5,700.00	\$5,700.00	2016	9/27/2016	SS091651021		0	SMALL BUSINESS
NEOPOST USA INC.	IGF::OT::IGF STANDARD MAINTENANCE FOR NEOPOST FOLDER INSERTER	\$5,634.12	\$5,634.12	2016	8/17/2016	SS041650003		3	OTHER THAN SMALL BUSINESS
PITNEY BOWES INC.	MAIL FACILITIES SUPPLIES FOR SSC AND NCC BUILDINGS	\$5,591.10	\$5,591.10	2015	4/7/2015	SS001550102		0	OTHER THAN SMALL BUSINESS
HERMAN MILLER, INC.	C197 OWINGS MILLS, MD - DESIGN, INSTALLATION AND PRODUCT ESTIMATE FOR THE REPLACEMENT OF THE CURRENT WORK SURFACE IN THE (PI) ROOM WITH (1) CONCAVE TABLE TO IMPROVE BOTH REACH AND ACCESSIBILITY IN THE ROOM FOR SYSTEMS FURNITURE. IGF::OT::IGF OTHER FUNCTION	\$5,568.00	\$5,568.00	2016	3/23/2016	SS001630260	SS001260003	0	OTHER THAN SMALL BUSINESS
HEALTH RESEARCH, INC.	NY STATE ENUMERATION AT BIRTH (EAB) CONTRACTOR SHALL PROVIDE BIRTH RECORD INFORMATION FOR THE PURPOSE OF OBTAINING SOCIAL SECURITY NUMBERS (SSNS) FOR NEWBORNS OF PARENT(S) WHO VOLUNTARILY REQUEST TO RECEIVE SSNS THROUGH THE EAB PROCESS.	\$509,818.05	\$5,556.60	2015	5/26/2015	SS001461093		1	OTHER THAN SMALL BUSINESS
ATKINSON-BAKER, INC.	IGF::CT::IGF COURT REPORTER SERVICES	\$5,540.00	\$5,540.00	2015	12/4/2014	SS091551003		0	OTHER THAN SMALL BUSINESS
COMCAST OF MARYLAND LIMITED PARTNERSHIP	IGF::OT::IGF BUSINESS BROADBAND INTERNET AND A SPORTS AND ENTERTAINMENT CABLE TV PACKAGE IS NEEDED FOR THE WOODLAWN FITNESS CENTER.	\$0.00	\$5,518.66	2015	7/29/2015	SS001550185		1	OTHER THAN SMALL BUSINESS
ACCREDITATION COUNCIL FOR CONTINUING MEDICAL EDUCATION	ACCME REPORT AND ACCREDITATION FEE IGF::CT::IGF	\$5,400.00	\$5,400.00	2016	2/2/2016	SS001650065		0	OTHER THAN SMALL BUSINESS
TVEYES INC.	TV EYES IS A SERVICE THAT MONITORS RADIO AND TV BROADCASTS AND REPORTS BACK INFO TO SSA VIA DATA FEEDS. WHENEVER SSA IS MENTIONED IN THE NEWS, TV EYES SERVICE PICKS UP THE MEDIA CLIP AND SENDS A REPORT BACK TO SSA. THE OFFICE OF COMMUNICATIONS PRESS OFFICE HAS BEEN USING TV EYES MONITORING SERVICE FOR OVER 6 YEARS AND IS FAMILIAR WITH THE REPORTS AND CONTACTS THEIR SYSTEM PROVIDES.	\$5,400.00	\$5,400.00	2016	1/29/2016	SS001650052		0	SMALL BUSINESS
HERMAN MILLER, INC.	LAKEPORT, CA AA32 - DESIGN, INSTALLATION AND PRODUCT ESTIMATE FOR 2 ADD-ON WORKSTATIONS FOR NEW HIRES FOR SYSTEMS FURNITURE	\$5,322.50	\$5,322.50	2015	12/4/2014	SS001431953	SS001260003	1	OTHER THAN SMALL BUSINESS
ACCREDITATION COUNCIL FOR CONTINUING MEDICAL EDUCATION	IGF::CT::IGF ACCME REPORT AND ACCREDITATION FEE	\$5,300.00	\$5,300.00	2015	12/30/2014	SS001550063		0	OTHER THAN SMALL BUSINESS
HENSEL PHELPS SERVICES LLC	IGF::OT::IGF TASK ORDER TO HAVE THE O&M CONTRACTOR INSTALL A NEW BATTERY RACK SUPPLIED BY THE GOVERNMENT.	\$5,278.02	\$5,278.02	2016	3/29/2016	SS001630261	SS001461106	0	OTHER THAN SMALL BUSINESS
CPC, INC	IGF::CT::IGF ANNUAL SUBSCRIPTION TO CARROLL'S GOVSEARCH. GOVSEARCH PROVIDES CONTACT AND OTHER INFORMATION FOR FEDERAL AND STATE GOVERNMENT OFFICIALS AND UPPER LEVEL EMPLOYEES.	\$5,250.00	\$5,250.00	2016	12/30/2015	SS001650032		0	SMALL BUSINESS
CPC, INC	IGF::CT::IGF THIS IS A RENEWAL OF AN ANNUAL SUBSCRIPTION TO CARROLL'S GOVSEARCH. GOVSEARCH PROVIDES CONTACT AND OTHER INFORMATION FOR FEDERAL AND STATE GOVERNMENT OFFICIALS AND UPPER LEVEL EMPLOYEES.	\$5,250.00	\$5,250.00	2015	12/19/2014	SS001550035		0	SMALL BUSINESS
DIVERSIFIED SYSTEMS	INSTALLATION OF SECURITY EQUIPMENT	\$5,250.00	\$5,250.00	2016	3/22/2016	SS041650006		0	SMALL BUSINESS
PESTROL, INC.	IGF::CT::IGF PEST CONTROL SERVICES AT THE ADDABBO FEDERAL BUILDING	\$5,186.00	\$5,186.00	2015	8/14/2015	SS021550008		0	SMALL BUSINESS
FLOW CONTROL INC	SOLE SOURCE, TO FLOW CONTROL, INC. TO PURCHASE A BRAY SERIES 36H FLANGED SEATED BUTTERFLY VALVE.	\$5,179.00	\$5,179.00	2016	1/7/2016	SS001650040		0	SMALL BUSINESS

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ROSS TECHNOLOGY CORPORATION	IGF::CT::IGF INSTALL CABINET HEATER IN BOTH DROP ARM GATES LOCATED AT THE PARKING GARAGE.	\$5,157.00	\$5,157.00	2015	3/23/2015	SS021550004		0	SMALL BUSINESS
TIS AMERICAS, INC.	RENEWAL OF MAINTENANCE ON TOP IMAGE SYSTEMS (TIS) EFLOW INTEGRA SOFTWARE FOR THE PERIOD OF PERFORMANCE FROM MAY 15, 2016 THROUGH OCTOBER 31, 2016.	\$5,133.33	\$5,133.33	2016	4/7/2016	SS001650102		0	SMALL BUSINESS
HENSEL PHELPS SERVICES LLC	IGF::OT::IGF  THE PURPOSE OF THIS REQUISITION IS FOR THE REPAIR OF ROLL-UP DOOR 1201C THAT PROVIDE ACCESS FOR THE DELIVERY AND INSTALLATION OF ELECTRICAL, MECHANICAL EQUIPMENT FROM THE WAREHOUSE LOADING DOCK. THE ROLL-UP DOOR WILL NOT OPERATE AUTOMATICALLY OR MANUALLY AND CONTRACTOR INVESTIGATIONS HAVE DETERMINED THE ISSUE TO BE A PROBLEM WITH THE SPRINGS IN THE COUNTERBALANCE BARREL. REPAIRS WILL REQUIRE THE REMOVAL OF A PORTION OF THE CEILING TILE AND GRID TO ALLOW FOR THE REMOVAL OF THE ROLL-UP DOOR WITH A FORKLIFT. THE CONTRACTOR WILL NEED TO REPLACE THE FAILED COUNTERBALANCE BARREL, REINSTALL THE DOOR, SET LIMITS AND TEST OPERATIONS.	\$5,129.76	\$5,129.76	2016	5/23/2016	SS001630383	SS001461106	0	OTHER THAN SMALL BUSINESS
HERMAN MILLER, INC.	ELIZABETHTOWN, KY C449 INSTALLER HOURS AND PRODUCT FOR SYSTEMS FURNITURE	\$5,118.10	\$5,118.10	2015	3/30/2015	SS001530356	SS001260003	0	OTHER THAN SMALL BUSINESS
SOCIETY FOR HUMAN RESOURCE MANAGEMENT	IGF::OT::IGF RENTAL OF CORNER EXHIBIT BOOTH #2066 AT THE SOCIETY FOR HUMAN RESOURCES MANAGEMENT (SHRM) 2015 ANNUAL CONFERENCE&EXPOSITION AT THE LAS VEGAS CONVENTION CENTER IN LAS VEGAS, NV FROM JUNE 28, 2015 TO JULY 1, 2015.	\$5,100.00	\$5,100.00	2015	3/26/2015	SS001550098		0	OTHER THAN SMALL BUSINESS
FRONTIER COMMUNICATIONS CORPORATION	INSTALL PHONE SYSTEM IN ELKO, NV (I55) RESIDENT STATION AT 350 W SILVER ST, ELKO, NV 89801.	\$5,087.75	\$5,087.75	2015	9/22/2015	SS001550296		0	SMALL BUSINESS
CENTER FOR PERSONAL PROTECTION AND SAFETY INC	ANNUAL ENTERPRISE LICENSE AGREEMENT FOR FLASHPOINT: RECOGNIZING AND PREVENTING VIOLENCE IN THE WORKPLACE.	\$5,025.00	\$5,025.00	2015	6/24/2015	SS001550181		0	SMALL BUSINESS
RICOH PRODUCTION PRINT SOLUTIONS LLC	IBM AFP2WEB TRANSFORM MAINTENANCE RENEWAL	\$5,000.00	\$5,000.00	2015	6/30/2015	SS001550160		0	OTHER THAN SMALL BUSINESS
HEALTH LEVEL SEVEN INTERNATIONAL INC.	IGF::OT::IGF HEALTH LEVEL SEVEN (HL7) MEMBERSHIP RENEWAL	\$5,000.00	\$5,000.00	2015	7/11/2015	SS001550204		0	OTHER THAN SMALL BUSINESS
RICOH PRODUCTION PRINT SOLUTIONS LLC	RENEWAL OF SS00-15-50160 FOR MAINTENANCE ON IBM AFP2WEB TRANSFORM SOFTWARE.	\$5,000.00	\$5,000.00	2016	6/14/2016	SS001650156		0	OTHER THAN SMALL BUSINESS
TENACITY, INC.	THE PROCUREMENT OF A NEW TEXT OVER INTERNET PROTOCOL (TOIP) COMPUTER-BASED SOLUTION	\$5,000.00	\$5,000.00	2015	9/2/2015	SS001560035		1	SMALL BUSINESS
HERMAN MILLER, INC.	WEST COVINA, CA #Z943 - DE-INSTALL (2) WORKSTATIONS AND RE-INSTALL (2) WORKSTATIONS FOR SYSTEMS FURNITURE. HVAC UNIT NEEDS EMERGENCY REPAIRS AND WORKSTATION NEED TO MOVED AND STORED ON-SITE FOR THE REPAIRS.	\$4,998.00	\$4,998.00	2015	6/23/2015	SS001530649	SS001260003	0	OTHER THAN SMALL BUSINESS
SHI INTERNATIONAL CORP.	MAINTENANCE ON SHAREGATE LITE MIGRATION TOOL	\$4,995.00	\$4,995.00	2016	5/20/2016	SS001650125		0	OTHER THAN SMALL BUSINESS
UNITED STATES POSTAL SERVICE	TO RENEW PO BOX RENTALS FOR JUNE IGF::CL::IGF	\$4,960.00	\$4,960.00	2015	4/30/2015	SS031550008		0	OTHER THAN SMALL BUSINESS
SABREE, INC.	IGF::OT::IGF THE CONTRACTOR WILL PROVIDE ALL LABOR, MATERIALS, EQUIPMENT AND SUPERVISION TO REMOVE APPROXIMATELY 12 LINEAR FEET AND 5 PIPE ELBOWS OF ASBESTOS PIPE INSULATION IN THE SUPPLY BUILDING, GROUND FLOOR, BOILER/CHILLER ROOM.	\$4,933.16	\$4,933.16	2016	9/6/2016	SS001630725	SS001461113	0	SMALL BUSINESS
JIDE SOFTWARE, INC	JIDE SOFTWARE INC. ULTIMATE SUITE AND DEVELOPER LICENSES	\$4,899.94	\$4,899.94	2016	12/22/2015	SS001650038		0	OTHER THAN SMALL BUSINESS
JIDE SOFTWARE, INC	RENEWAL OF SS00-14-51037 - MAINTENANCE OF JIDE SOFTWARE S ULTIMATE SUITE	\$4,899.94	\$4,899.94	2015	12/24/2014	SS001550060		0	SMALL BUSINESS
LINKEDIN CORPORATION	LYNDA.COM IS ONLINE TRAINING THAT PROVIDES A LEARNING ENVIRONMENT TO THE SEVEN HQ AND REGIONAL IVT/VOD STUDIOS STAFF. THIS ONLINE TRAINING IS PROVIDED SO THAT STAFF CAN KEEP UP TO DATE WITH THE LATEST AND GREATEST SOFTWARE&TECHNIQUES.	\$4,820.16	\$4,820.16	2016	7/5/2016	SS001650174		0	OTHER THAN SMALL BUSINESS

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TIME WARNER CABLE INC.	IGF::OT::IGF CABLE TV SERVICES FOR SECOND SUPPORT CENTER IN DURHAM, N.C.	\$4,799.64	\$4,799.64	2015	7/27/2015	SS001250190		3	OTHER THAN SMALL BUSINESS
TIME WARNER CABLE INC.	IGF::OT::IGF CABLE TV SERVICES FOR SECOND SUPPORT CENTER IN DURHAM, N.C.	\$4,799.64	\$4,799.64	2016	6/17/2016	SS001250190		4	OTHER THAN SMALL BUSINESS
NATIONAL ASSOCIATION FOR PUBLIC HEALTH STATISTICS AND INFORM	IGF::OT::IGF TESTING AND TECHNICAL ASSISTANCE FOR STATES IMPLEMENTING ELECTRONIC DEATH REGISTRATION SYSTEM - TASK ORDER SS00-16-30825	\$4,738.00	\$4,738.00	2016	9/21/2016	SS001630825	SS001660002	0	OTHER THAN SMALL BUSINESS
HERMAN MILLER, INC.	SYSTEMS FURNITURE CONTRACT	\$4,711.00	\$4,711.00	2015	12/17/2014	SS001260003		25	OTHER THAN SMALL BUSINESS
ELIXIR TECHNOLOGIES CORPORATION	ELIXIR DESIGNPRO TOOLS FOR AFP MIGRATION	\$4,697.00	\$4,697.00	2015	7/9/2015	SS001550202		0	SMALL BUSINESS
ELIXIR TECHNOLOGIES CORPORATION	ELIXIR DESIGNPRO TOOLS FOR AFP MIGRATION	\$4,697.00	\$4,697.00	2015	7/9/2015	SS001550202		0	SMALL BUSINESS
MODULAR SPACE CORPORATION	RENTAL OF MODULAR OFFICE FOR THE SELLS, AZ RESIDENT STATION	\$4,695.84	\$4,695.84	2016	7/11/2016	SS091652003		0	OTHER THAN SMALL BUSINESS
DIAMOND COMMUNICATIONS INC	UPGRADING OF SECURITY SYSTEM IGF::CL::IGF CLOSELY ASSOCIATED	\$4,676.71	\$4,676.71	2015	9/18/2015	SS091552008		0	SMALL BUSINESS
HERMAN MILLER, INC.	CASA GRANDE, AZ R903 - MISSING PRODUCT AND INSTALLER HOURS FOR R903 FOR SYSTEMS FURNITURE.	\$4,629.00	\$4,629.00	2016	11/18/2015	SS001630069	SS001260003	0	OTHER THAN SMALL BUSINESS
SHI INTERNATIONAL CORP.	RENEW MAINTENANCE FOR TECHSMITH SOFTWARE.	\$4,571.55	\$4,571.55	2015	3/2/2015	SS001550076		0	OTHER THAN SMALL BUSINESS
CREATIVE LOGISTICS SOLUTIONS, INC.	RENEWAL OF ANNUAL INFOSHIP SOFTWARE UPDATE AGREEMENT FOR JANUARY 1, 2016 - DECEMBER 31, 2016.	\$4,570.00	\$4,570.00	2016	3/7/2016	SS001650073		0	SMALL BUSINESS
EXPERIAN MARKETING SOLUTIONS, INC.	EXPERIAN NAMESEARCH LICENSES	\$4,529.36	\$4,529.36	2016	11/30/2015	SS001650026		0	OTHER THAN SMALL BUSINESS
SHI INTERNATIONAL CORP.	SOCIAL SECURITY ADMINISTRATION'S OFFICE OF THE INSPECTOR GENERAL REQUIRES MAINTENANCE RENEWAL OF ITS SYSTRACK SERVER AND DESKTOP MONITORING SOFTWARE LICENSES.	\$4,528.30	\$4,528.30	2016	1/11/2016	SS001650055		0	OTHER THAN SMALL BUSINESS
PENNSYLVANIA - AMERICAN WATER COMPANY	IGF::OT::IGF PROVIDE ADDITIONAL FUNDING THROUGH JULY 31, 2016.	\$4,500.00	\$4,500.00	2016	7/21/2016	SS001550211		1	OTHER THAN SMALL BUSINESS
NEXUM, INC.	IGF::CT::IGF PURCHASING CLOUDERA DEVELOPER TRAINING FOR APACHE HADOOP TO ENABLE DEVELOPERS TO MORE FULLY USE THE HADOOP CLUSTER FOR ATSNA AND THE ENTERPRISE DATA WAREHOUSE.	\$4,490.00	\$4,490.00	2015	8/4/2015	SS001550243		0	OTHER THAN SMALL BUSINESS
B.S. ENVIRONMENTAL, INC.	THIS IS A DELIVERY ORDER TO BE ISSUED AGAINST CONTRACT SS00-14-61041 TO REMOVE BOTH HAZARDOUS AND NON- HAZARDOUS WASTE MATERIALS FROM AN SSA LOCATION. IGF::CT::IGF	\$4,470.00	\$4,470.00	2015	12/4/2014	SS001530138	SS001461041	0	SMALL BUSINESS
HERMAN MILLER, INC.	RAPID CITY, SD #BW717 - INSTALLATION AND PRODUCT COSTS FOR A REPLACEMENT TABLE FOR SYSTEMS FURNITURE.	\$4,464.10	\$4,464.10	2016	3/7/2016	SS001630218	SS001260003	0	OTHER THAN SMALL BUSINESS
LYME COMPUTER SYSTEMS, INC.	RENEW MAINTENANCE FOR MATHWORKS MATLAB.	\$4,402.20	\$4,402.20	2016	3/3/2016	SS001650076		0	SMALL BUSINESS
HERMAN MILLER, INC.	SAN JUAN, PR #AE04 SYSTEMS FURNITURE DESIGN, INSTALLATION AND PRODUCT FOR SYSTEMS FURNITURE.	\$4,370.78	\$4,370.78	2015	4/17/2015	SS001432040	SS001260003	2	OTHER THAN SMALL BUSINESS
EATON CORPORATION	IGF::OT::IGF DIAGNOSE AND REPAIR PROBLEMS AT THE NATIONAL COMPUTER CENTER (UPS).	\$4,367.00	\$4,367.00	2016	4/11/2016	SS001630025	SS001560064	0	OTHER THAN SMALL BUSINESS
ADMIRAL ELEVATOR COMPANY, INC.	REMOVE WORN DAMAGED CARPET TILE AT RMB ENTRANCE #15 AND REPLACE WITH NEW CARPET TILE. IGF::OT::IGF	\$4,346.86	\$4,346.86	2015	7/7/2015	SS001530677	SS001060042	0	SMALL BUSINESS
HERMAN MILLER, INC.	GALLUP, NM X861 -INSTALLATION, TRAVEL AND REPLACEMENT BOM FOR OUT OF WARRANTY ITEM FOR SYSTEMS FURNITURE	\$4,308.08	\$4,308.08	2016	4/21/2016	SS001630323	SS001260003	0	OTHER THAN SMALL BUSINESS
HENSEL PHELPS SERVICES LLC	THE PURPOSE OF THIS REQUISITION IS FOR THE COMPLETION OF THE ANNUAL TESTING AND INSPECTION OF THE TWO (2) 50,000- GALLON UNDERGROUND STORAGE TANKS AND ASSOCIATED PIPING, SPILL BUCKETS AND THE RE-CERTIFICATION OF THE PNEUMERCATOR TMS-3000. THE COMPONENTS THAT ARE PART OF THE ANNUAL TEST AND INSPECTION ARE PART OF THE FUEL SYSTEM THAT OPERATES THE SIX (6) DIESEL GENERATORS FOR POWER EMERGENCIES AT THE NATIONAL SUPPORT CENTER IN URBANA, MD.	\$4,295.50	\$4,295.50	2016	6/20/2016	SS001630475	SS001461106	0	OTHER THAN SMALL BUSINESS
ATAZZ TECHNICAL SERVICES, INC.	IGF::CT::IGF SHAREGATE LITE SOFTWARE RENEWAL	\$4,245.00	\$4,245.00	2015	6/3/2015	SS001550158		0	SMALL BUSINESS

Vendor Name	Description of Requirement	Action Obligation	Base and All Options Value	Fiscal Year	Date Signed	PO/Delivery Order/Task Order/Call#	Parent Contract	Mod #	Contracting Officers Business Size Selection
HERMAN MILLER, INC.	GREENSBORO, NC OY20 - MEASUREMENT AND INVENTORY TO DETERMINE STATUS OF OFFICE. WE HAVE BEEN INFORMED CHANGES TO FURNITURE HAVE BEEN MADE WITHOUT HQ KNOWLEDGE OR AUTHORIZATION.	\$4,238.00	\$4,238.00	2016	7/27/2016	SS001630603	SS001260003	0	OTHER THAN SMALL BUSINESS
ZONES, INC.	RENEW MAINTENANCE FOR TECHSMITH SOFTWARE.	\$4,209.20	\$4,209.20	2016	4/8/2016	SS001650077		0	OTHER THAN SMALL BUSINESS
ROBERTA A SCHULMAN PHD	DR. SCHULMAN MODIFICATION TO ADD CASES SS00-11-40041								
HERMAN MILLER, INC.	IGF::CT::IGF	\$4,100.00	\$4,100.00	2015	1/13/2015	6	SS001140041	0	SMALL BUSINESS
HERMAN MILLER, INC.	SYSTEMS FURNITURE CONTRACT	\$4,095.31	\$4,095.31	2015	2/20/2015	SS001260003		29	OTHER THAN SMALL BUSINESS
HERMAN MILLER, INC.	LENEXA, KS #1779 - PRE-DESIGN WORK-APPROVED BY DFS MANAGEMENT FOR SYSTEMS FURNITURE.	\$4,059.00	\$4,059.00	2015	6/23/2015	SS001530650	SS001260003	0	OTHER THAN SMALL BUSINESS
MSDSPRO, LLC	IGF::CT::IGF MODIFICATION TO EXTEND SERVICES FOR 60 DAYS, INCORPORATE FAR 52.217-8 AND OBLIGATE ADDITIONAL FUNDING.	\$4,030.00	\$4,030.00	2015	4/16/2015	SS001550016		2	SMALL BUSINESS
HERMAN MILLER, INC.	SUPERIOR, WI #Z544 TO RE-INSTALL ONE WORKSTATION AND MOVE MULTIPLE WORKSTATIONS BACK INTO PLACE - FOR SYSTEMS FURNITURE.	\$4,004.00	\$4,004.00	2016	1/11/2016	SS001630138	SS001260003	0	OTHER THAN SMALL BUSINESS
UNITED STATES POSTAL SERVICE	RENEWAL OF WBDOC POST OFFICE FOR THE PERIOD OF PERFORMANCE SEPTEMBER 1, 2015 THROUGH AUGUST 31, 2016. IGF::OT::IGF	\$3,996.00	\$3,996.00	2015	7/20/2015	SS031550018		0	OTHER THAN SMALL BUSINESS
HERMAN MILLER, INC.	OLYMPIA, WA X918 -DESIGN (TO CREATE REPLACEMENT BOM), INSTALLER HOURS AND ESTIMATED PRODUCT COST TO REPLACE 4 TABLE BASES THAT ARE OUT OF WARRANTY - FOR SYSTEMS FURNITURE.	\$3,940.00	\$3,940.00	2015	5/4/2015	SS001530462	SS001260003	0	OTHER THAN SMALL BUSINESS
TECHFIRST, INC.	IGF::CT::IGF SIGN LANGUAGE INTERPRETER SERVICES AS A REASONABLE ACCOMMODATION FOR EMPLOYEES WHO ARE DEAF OR HARD OF HEARING	\$3,912.40	\$3,912.40	2016	9/23/2016	SS001650214		1	SMALL BUSINESS
PCMG, INC.	SUBLIME TEXT EDITOR SOFTWARE FOR DCPS DEVELOPERS	\$3,899.70	\$3,899.70	2015	9/23/2015	SS001550314		0	OTHER THAN SMALL BUSINESS
UNITED STATES POSTAL SERVICE	IGF::CT::IGF THE RENEWAL OF 3 PO BOXES, NEEDED FOR INCOMING DOCUMENTS FOR VARIOUS COMPONENTS IN THE RO. MUS BE PAID FOR LOCALLY.	\$3,896.00	\$3,896.00	2016	3/21/2016	SS051650002		0	OTHER THAN SMALL BUSINESS
FEDERAL PRISON INDUSTRIES INC	TO PURCHASE BOOKCASES AND CHAIRS FOR NEW ALJ TO MATCH FURNITURE ALREADY PURCHASED FROM UNICOR.	\$3,856.32	\$3,856.32	2016	4/11/2016	SS061650002		0	OTHER THAN SMALL BUSINESS
SKILLTRAN LLC	THE OFFICE OF TELECOMMUNICATIONS SYSTEM OPERATIONS REQUEST RENEWAL OF SS00-14-51159 FOR MAINTENANCE ON SKILLTRAN OASYS SOFTWARE.	\$3,840.00	\$3,840.00	2015	6/25/2015	SS001550177		0	SMALL BUSINESS
HERMAN MILLER, INC.	ELIZABETHTOWN, KY C449, INSTALLER HOURS AND PRODUCT FOR SYSTEMS FURNITURE	\$3,821.84	\$3,821.84	2016	7/18/2016	SS001630555	SS001260003	0	OTHER THAN SMALL BUSINESS
UNITED STATES POSTAL SERVICE	IGF::OT::IGF RENEWAL OF P.O. BOXES AND CALL SERVICE FOR THE HWSSC. THIS ITEM MUST BE PAID FOR LOCALLY, AT THE POST OFFICE, IN PERSON.	\$3,798.00	\$3,798.00	2015	3/13/2015	SS051550003		0	OTHER THAN SMALL BUSINESS
THE MATHWORKS INC	RENEWAL OF MAINTENANCE FOR SS00-14-51074 FOR MATHWORKS SOFTWARE	\$3,693.00	\$3,693.00	2015	3/17/2015	SS001550094		0	OTHER THAN SMALL BUSINESS
HERMAN MILLER, INC.	SAN JUAN, PR #Z271 - FIELD OFFICE EXPERIENCED A SMALL FIRE THAT CAUSED DAMAGED TO FOUR WORKSTATIONS THAT NEED TO BE REPLACE DUE TO WATER AND SMOKE - MODIFICATION TO ADD PRODUCT AND OCEAN FREIGHT.	\$3,678.14	\$3,678.14	2016	9/28/2016	SS001630770	SS001260003	1	OTHER THAN SMALL BUSINESS
JUSINO-BERRIOS, CARLOS M	IGF::OT::IGF PROVIDE EXPERT WITNESS TESTIMONY	\$3,638.66	\$3,638.66	2015	9/1/2015	SS021550010		0	SMALL BUSINESS
XCEL PROTECTIVE SERVICES, INC.	TASK ORDER 1 AGAINST CONTRACT SS00-16-60027 FOR ADDITIONAL PRODUCTIVE SERVICES.								
MORNINGSTAR MAIN HICKORY	SERVICE CONTRACT FUNCTION TYPE: IGF::OT::IGF	\$3,633.00	\$3,633.00	2016	7/15/2016	1	SS001660027	0	SMALL BUSINESS
HERMAN MILLER, INC.	IGF::OT::IGF	\$3,626.00	\$3,626.00	2015	3/11/2015	SS041550015		0	SMALL BUSINESS
HERMAN MILLER, INC.	ET28 PORTLAND, OR ODAR DESIGN, INSTALL, AND TRAVEL EXPENSES FOR SYSTEMS FURNITURE	\$3,563.00	\$3,563.00	2015	5/27/2015	SS001431941	SS001260003	1	OTHER THAN SMALL BUSINESS



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FUTURENET SECURITY SOLUTIONS, LLC	IGF::CT::IGF THE SECOND SUPPORT CENTER IS A CRITICAL FACILITY SECURITY LEVEL 4 FEDERAL SSA BUILDING. DURING RECENT QUARTERLY PREVENTATIVE MAINTENANCE (PM) ACTIVITY, OUR CONTRACT SERVICE PROVIDER DISCOVERED MULTIPLE DEFECTS THAT NEED TO BE RECTIFIED ON CRITICAL VEHICLE BARRIERS THAT ARE USED TO KEEP OUT PEOPLE WITH MALICIOUS INTENT. IT IS IMPERATIVE THAT OUR VEHICLE BARRIERS ARE KEPT IN GOOD WORKING ORDER AT ALL TIMES TO KEEP OUT VEHICLE BORNE IMPROVISED EXPLOSIVE DEVICES.	\$3,443.00	\$3,443.00	2016	1/5/2016	SS001650053		0	OTHER THAN SMALL BUSINESS
SHI INTERNATIONAL CORP.	SOCIAL SECURITY ADMINISTRATION'S OFFICE OF THE INSPECTOR GENERAL (OIG) IS LOOKING TO RE-ARCHITECT THE SHAREPOINT FARM LAYOUT WHILE UPGRADING TO SHAREPOINT 2013 FROM SHAREPOINT 2007. MOVING CONTENT DIRECTLY FROM SHAREPOINT 2007 TO SHAREPOINT REQUIRES A THIRD PARTY PRODUCT. TO ALLOW FOR CONTENT MIGRATION, OIG SEEKS TO PURCHASE A THIRD PARTY PRODUCT (SHAREGATE MIGRATION TOOL) WHICH PROVIDES CONTENT MIGRATION FEATURES CAPABLE OF MOVING CONTENT FROM OLDER SHAREPOINT VERSION TO NEWER VERSIONS WITHOUT CORRUPTING CONTENT. THE SUBSCRIPTION IS FOR 12 MONTHS FROM THE DATE OF AWARD.	\$3,442.50	\$3,442.50	2015	6/30/2015	SS001550182		0	OTHER THAN SMALL BUSINESS
HEALTHCARE INFORMATION AND MANAGEMENT SYSTEMS SOCIETY	IGF::OT::IGF HEALTHCARE INFORMATION MANAGEMENT SYSTEMS SOCIETY (HIMMS) MEMBERSHIP AND SUBSCRIPTION RENEWAL	\$3,375.00	\$3,375.00	2016	6/3/2016	SS001650099		0	OTHER THAN SMALL BUSINESS
NATIONAL BUSINESS FURNITURE, LLC	PURCHASE FURNITURE FOR THE ADM OFFICE AT THE COLUMBUS DOWNTOWN, OH FIELD OFFICE	\$3,234.15	\$3,234.15	2015	7/21/2015	SS051550008		0	OTHER THAN SMALL BUSINESS
HERMAN MILLER, INC.	STATESVILLE, NC #E341 INSTALLER HOURS, TRAVEL AND PRODUCT FOR SYSTEMS FURNITURE.	\$3,172.26	\$3,172.26	2015	12/12/2014	SS001530157	SS001260003	0	OTHER THAN SMALL BUSINESS
HERMAN MILLER, INC.	TOMS RIVER, NJ #OA26 INSTALLER HOURS AND TRAVEL EXPENSES TO RECEIVE DELIVER AND INSTALL REPLACEMENT BOM FOR SYSTEMS FURNITURE	\$3,157.43	\$3,157.43	2015	3/18/2015	SS001530323	SS001260003	0	OTHER THAN SMALL BUSINESS
ADMIRAL ELEVATOR COMPANY, INC.	IGF::OT::IGF  TASK ORDER #45 SS00-15-30665  REMOVE AND REPLACE DAMAGED AND WORN CARPET AT RMB ENTRANCE 12.	\$3,107.95	\$3,107.95	2015	7/9/2015	SS001530665	SS001060042	0	SMALL BUSINESS
HERMAN MILLER, INC.	X163 - RIVERHEAD, NY - INSTALLATION SERVICES - REQUISITION IS SO THE INSTALLATION OF THE PRODUCT CURRENTLY IN STORAGE CAN BE INSTALLED AND COMPLETE THIS PROJECT. THIS NEW ORDER SHOULD BE CROSS-REFERENCED TO ORDER SS00-14-31660.	\$3,104.00	\$3,104.00	2015	4/30/2015	SS001530454	SS001260003	0	OTHER THAN SMALL BUSINESS
HERMAN MILLER, INC.	SANFORD, NC #VB05 - DESIGN AND INSTALLATION SERVICES AND ESTIMATED PRODUCT FOR SYSTEMS FURNITURE	\$3,087.02	\$3,087.02	2015	6/8/2015	SS001530587	SS001260003	0	OTHER THAN SMALL BUSINESS
HERMAN MILLER, INC.	SANFORD, NC #VB05 INSTALLER HOURS, TRAVEL EXPENSES AND PRODUCT TO RECEIVE DELIVER AND INSTALL REPLACEMENT BOM FOR SYSTEMS FURNITURE.	\$3,087.02	\$3,087.02	2015	3/18/2015	SS001530324	SS001260003	0	OTHER THAN SMALL BUSINESS
DOCISOFT, INC.	IGF::OT::IGF  RENEWAL OF MAINTENANCE AND SUPPORT FOR DOCISOFT AV APPLIANCE HW/SW.	\$3,082.95	\$3,082.95	2015	8/4/2015	SS001550222		0	SMALL BUSINESS
GOODWILL INDUSTRIES OF THE CHESAPEAKE INCORPORATED	WEEKEND RUG CLEANING: CHILD CARE CENTER. THE CONTRACTOR SHALL SUPPLY ALL LABOR AND SUPERVISION TO CLEAN ALL EIGHTY-ONE THROW RUGS THROUGHOUT THE MULTI-PURPOSE ROOM, PAVILION, AND FIFTEEN CLASSROOMS ONCE A MONTH WITHIN THE ONSITE CHILD CARE CENTER.	\$3,045.28	\$3,045.28	2016	7/28/2016	SS000860004		32	OTHER THAN SMALL BUSINESS
CONVERGINT TECHNOLOGIES LLC	IGF::CT::IGF CONVERGINT TECHNOLOGIES - CCTV BOSCH SERVER RECORDER REPAIR AND REINSTALL	\$3,043.13	\$3,043.13	2016	5/22/2016	SS051650005		0	OTHER THAN SMALL BUSINESS

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PITNEY BOWES INC.	EXERCISE OPTION PERIOD IV UNDER CONTRACT NO. SS00-10-60050	\$3,040.00	\$3,040.00	2015	3/11/2015	SS001060050		12	OTHER THAN SMALL BUSINESS
HERMAN MILLER, INC.	SYSTEMS FURNITURE CONTRACT	\$2,988.00	\$2,988.00	2015	6/9/2015	SS001260003		31	OTHER THAN SMALL BUSINESS
COMCAST OF MASSACHUSETTS I, INC.	IGF::OT::IGF PROVIDE INTERNET SERVICE FOR VSD AT THE COUNCIL ON AGING IN HARWICH, MA.	\$1,577.80	\$2,956.60	2016	7/13/2016	SS011650007		0	OTHER THAN SMALL BUSINESS
LOCUM, INC.	REQUEST FOR CALL ORDER FOR MEDSTAFF FOR PATEL IGF::CL::IGF	\$2,899.00	\$2,899.00	2016	3/21/2016		1 SS04164C058	0	SMALL BUSINESS
VINOD SHAH	REQUEST FOR CALL ORDER FOR ORIENTATION FOR V SHAH FOR 40 HOURS OF ORIENTATION IGF::CL::IGF	\$2,899.00	\$2,899.00	2016	3/21/2016		1 SS04164C055	0	SMALL BUSINESS
DSOFT TECHNOLOGY COMPANY	RENEWAL OF SS00-15-50135 FOR MAINTENANCE ON UMBRACO SOFTWARE	\$2,800.00	\$2,800.00	2016	5/3/2016	SS001650117		0	SMALL BUSINESS
COMPUTER LANGUAGE CO INC, THE	IGF::CT::IGF TO PURCHASE THE COMPUTER DESKTOP ENCYCLOPEDIA	\$2,700.00	\$2,700.00	2016	8/19/2016	SS001650216		0	SMALL BUSINESS
TIME WARNER CABLE INC.	IGF::OT::IGF OTHER FUNCTIONS  TO PROVIDE CABLE SERVICE THROUGHOUT THE RO FOR EXECUTIVES TO BE ABLE TO MONITOR EMERGENCY SITUATIONS AS THEY OCCUR THROUGHOUT THE REGION.  IGF::CL,CT::IGF PRIMARILY CLOSELY, BUT ALSO CRITIAL IGF::CT,CL::IGF PRIMARILY CRITICAL, BUT ALSO CLOSELY	\$2,535.00	\$2,535.00	2015	9/30/2015	SS001550319		0	OTHER THAN SMALL BUSINESS
FABER BURNER COMPANY	IGF::OT::IGF  EMERGENCY WORK NEEDED TO SWITCH BOILERS OVER TO OIL DUE TO GAS LEAK IN ALTMAYER FRONT LAWN.	\$2,506.20	\$2,506.20	2016	10/23/2015	SS001650012		0	OTHER THAN SMALL BUSINESS
HERMAN MILLER, INC.	RIO PIEDRAS, PR A271 DESIGN, INSTALLATION, PRODUCT, OCEAN FREIGHT FOR SYSTEMS FURNITURE.	\$2,500.00	\$2,500.00	2015	3/16/2015	SS001530068	SS001260003	1	OTHER THAN SMALL BUSINESS
HERMAN MILLER, INC.	LENEXA, KS I779 PHASED RECONFIGURATION FOR SYSTEMS FURNITURE MODIFICATION TO ADD INSTALL HOURS	\$2,478.00	\$2,478.00	2016	1/14/2016	SS001530687	SS001260003	1	OTHER THAN SMALL BUSINESS
ADMIRAL ELEVATOR COMPANY, INC.	IGF::OT::IGF  TASK ORDER #46 SS00-15-30666  REMOVE AND INSTALL THE CARPET TILE AT RMB ENTANCE #14	\$2,258.27	\$2,258.27	2015	7/9/2015	SS001530666	SS001060042	0	SMALL BUSINESS
TIME WARNER CABLE INC.	"IGF::OT::IGF" CABLE SERVICE THROUGHOUT THE DALLAS RO	\$2,079.72	\$2,079.72	2016	8/18/2016	SS061650005		0	OTHER THAN SMALL BUSINESS
MORNINGSTAR MAIN HICKORY	IGF::OT::IGF TEMPORARY STORAGE UNITS FOR SSA HICKORY, NC	\$2,003.40	\$2,003.40	2016	1/21/2016	SS041550015		1	SMALL BUSINESS
HERMAN MILLER, INC.	SYSTEMS FURNITURE CONTRACT - TO PAY CLAIMS UNDER THIS CONTRACT.	\$1,785.50	\$1,785.50	2016	6/23/2016	SS001260003		36	OTHER THAN SMALL BUSINESS
MUZAK LLC	MUSIC SERVICE FOR COMPONENTS	\$1,768.68	\$1,768.68	2015	3/30/2015	SS041550018		0	SMALL BUSINESS
EDITOR SOFTWARE (U K) LTD	EDITOR STYLEWRITER	\$1,660.00	\$1,660.00	2015	8/6/2015	SS001550210		0	OTHER THAN SMALL BUSINESS
HERMAN MILLER, INC.	ROLLA, MO (C750) DESIGN, PRODUCT, INSTALLATION, AND TRAVEL COSTS TO INSTALL 9 HMI CONCAVE TABLES; FOR SYSTEMS FURNITURE.	\$1,337.82	\$1,337.82	2015	4/20/2015	SS001530283	SS001260003	1	OTHER THAN SMALL BUSINESS
FEDERAL PRISON INDUSTRIES INC	PURCHASE UNICOR FURNITURE AS A SOLE SOURCE VENDOR FOR TWO NEW SENIOR SSA/OGC ATTORNEYS.	\$1,254.09	\$1,254.09	2015	8/20/2015	SS051550010		1	OTHER THAN SMALL BUSINESS
ALLIED PUMP CORP	PURCHASE TWO ALLIED 2SA VERTICAL SUMP PUMP 1/2 HP, 3/60/208/1725 WASH DOWN MOTOR ON 14" ROUND SUPPORT PLATE WITH DUPLEX CONTROL PANEL NEMA 4.	\$1,235.00	\$1,235.00	2015	1/21/2015	SS001550055		1	SMALL BUSINESS
UNITED STATES POSTAL SERVICE	RENEWL WBDO POST OFFICE BOXES FOR 1 YEAR FROM 7/1/2015 TO 6/30/2016- POST OFFICE BOXES CRITICAL TO WBDOC COMPONENT'S WORKLOAD. IGF::CL::IGF	\$1,196.00	\$1,196.00	2015	6/15/2015	SS031550011		1	OTHER THAN SMALL BUSINESS
HERMAN MILLER, INC.	HARTFORD (ODAR), CT #AX68 DESIGN, PRODUCT AND INSTALLATION SERVICES FOR SYSTEMS FURNITURE	\$999.08	\$999.08	2015	9/16/2015	SS001530825	SS001260003	1	OTHER THAN SMALL BUSINESS
EXPANCO, INC	IGF::OT::IGF OTHER FUNCTIONS FOLLOW-ON YEAR 3 SHREDDING SERVICES FOR SSA DALLAS REGIONAL OFFICE.	\$5,289.31	\$959.71	2016	1/28/2016	SS061354002		4	OTHER THAN SMALL BUSINESS
HERMAN MILLER, INC.	SYSTEMS FURNITURE CONTRACT	\$953.00	\$953.00	2015	6/24/2015	SS001260003		32	OTHER THAN SMALL BUSINESS

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DREAM MANAGEMENT, INC.	IGF::OT::IGF EXERCISE OPTION 3	\$509,468.16	\$952.67	2015	9/21/2015	SS001260085		9	SMALL BUSINESS
NEOPOST USA INC.	REPLACE WJ250G WITH 1M5000AG AT SAN JUAN DDS	\$232.32	\$929.28	2016	2/1/2016	SS001550057		2	OTHER THAN SMALL BUSINESS
HERMAN MILLER, INC.	MUSKOGEE, OK #Y787, INSTALLER HOURS AND PRODUCT FOR SYSTEMS FURNITURE	\$906.36	\$906.36	2016	9/14/2016	SS001630556	SS001260003	1	OTHER THAN SMALL BUSINESS
HERMAN MILLER, INC.	ST. TAMMANY, LA #BD18 - DESIGN, INSTALLATION AND PRODUCT ESTIMATE FOR SYSTEMS FURNITURE - MODIFICATION TO ADD PRODUCT	\$887.64	\$887.64	2016	7/27/2016	SS001630469	SS001260003	1	OTHER THAN SMALL BUSINESS
ALABAMA GOODWILL INDUSTRIES, INC.	IGF::CL::IGF WAREHOUSE SERVICES AT BSSC, FOLLOW-ON YEAR 1	\$164,246.76	\$852.96	2015	8/28/2015	SS041461003		1	OTHER THAN SMALL BUSINESS
PITNEY BOWES INC.	IGF::OT::IGF OBLIGATE MONEY FOR OVERTIME	\$840.00	\$840.00	2016	9/22/2016	SS001560041		2	OTHER THAN SMALL BUSINESS
HERMAN MILLER, INC.	LEESBURG, FL A258 DESIGN, PRODUCT AND INSTALLATION FOR SYSTEMS FURNITURE - MODIFICATION TO ADD PRODUCT	\$813.63	\$813.63	2016	8/25/2016	SS001630470	SS001260003	1	OTHER THAN SMALL BUSINESS
HERMAN MILLER, INC.	SAN ANGELO TX DO #X822 TO ADD 1 J-11 WORKSTATION FOR SYSTEMS FURNITURE - MOD TO INCREASE PRODUCT	\$806.52	\$806.52	2016	7/27/2016	SS001630349	SS001260003	1	OTHER THAN SMALL BUSINESS
HERMAN MILLER, INC.	SYSTEMS FURNITURE CONTRACT - THIS MODIFICATION IS TO SETTLE A CLAIM FOR CHICAGO, IL #AX26	\$688.00	\$688.00	2017	11/3/2016	SS001260003		38	OTHER THAN SMALL BUSINESS
EXPANCO, INC	IGF::OT::IGF OTHER FUNCTIONS SHREDDING SERVICES FOR SSA DALLAS REGIONAL OFFICE.	\$4,882.44	\$636.84	2015	1/26/2015	SS061354002		3	OTHER THAN SMALL BUSINESS
HERMAN MILLER, INC.	FT. SMITH, AR ODAR OFFICE #XX55 SYSTEMS FURNITURE WORKSTATION	\$578.09	\$578.09	2016	2/9/2016	SS001630057	SS001260003	1	OTHER THAN SMALL BUSINESS
COMCAST OF MASSACHUSETTS I, INC.	IGF::OT::IGF PROVIDE INTERNET SERVICE FOR VSD AT THE COUNCIL ON AGING IN HARWICH, MA.	\$239.40	\$478.80	2016	9/28/2016	SS011650007		1	OTHER THAN SMALL BUSINESS
HERMAN MILLER, INC.	DESIGN, PRODUCT AND INSTALLATION SERVICES FOR PHOENIX, AZ XX65 FOR SYSTEMS FURNITURE.	\$450.09	\$450.09	2015	3/18/2015	SS001530076	SS001260003	1	OTHER THAN SMALL BUSINESS
COX VIRGINIA TELCOM, L.L.C.	COX COMMUNICATION TV IGF::OT::IGF	\$420.00	\$420.00	2015	2/6/2015	SS001451233		1	OTHER THAN SMALL BUSINESS
JBG/BALTIMORE SSA, L.L.C.	RADIFICATION: SHOWER CURTAIN INSTALLATION WABASH FITNESS CENTER	\$394.02	\$394.02	2016	2/16/2016	SS001650068		0	SMALL BUSINESS
FALON SOURCING SOLUTIONS LLC	IGF::CT::IGF MODIFICATION TO OBLIGATE MONEY FOR 2 HOURS OF OVERTIME WORKED ON 9/01/2016	\$383.76	\$383.76	2016	9/21/2016	SS001660006		3	SMALL BUSINESS
HERMAN MILLER, INC.	MONROE LA #B8021 - ADDITIONAL MA-01 WORKSTATION IS REQUIRED - SYSTEMS FURNITURE.	\$370.87	\$370.87	2015	7/15/2015	SS001530548	SS001260003	1	OTHER THAN SMALL BUSINESS
JUSINO-BERRIOS, CARLOS M	IGF::OT::IGF PROVIDE EXPERT WITNESS TESTIMONY	\$322.95	\$322.95	2015	9/23/2015	SS021550010		1	SMALL BUSINESS
FALON SOURCING SOLUTIONS LLC	IGF::CT::IGF MODIFICATION TO OBLIGATE MONEY FOR OVERTIME WORKED ON 9/01/2016 AT SSC	\$269.76	\$269.76	2016	9/22/2016	SS001660005		3	SMALL BUSINESS
THINKLOGICAL, INC.	IGF::OT::IGF REQUEST FOR RATIFICATION OF UNAUTHORIZED COMMITMENT, MICROPURCHASE 15ITS003	\$250.00	\$250.00	2015	6/19/2015	SS001550175		0	SMALL BUSINESS
COMCAST OF MARYLAND LIMITED PARTNERSHIP	CORRECT THE PRICING IN ACCORDANCE WITH THE TERMS AND CONDITIONS SET FORTH IN THE CONTRACT	\$129.70	\$129.70	2015	12/8/2014	SS001250040		15	OTHER THAN SMALL BUSINESS
HERMAN MILLER, INC.	SYSTEMS FURNITURE CONTRACT	\$100.00	\$100.00	2015	4/22/2015	SS001260003		30	OTHER THAN SMALL BUSINESS
TIME WARNER CABLE INC.	"IGF::OT::IGF" CABLE SERVICE THROUGHOUT THE DALLAS RO	\$67.68	\$67.68	2016	9/7/2016	SS061650005		1	OTHER THAN SMALL BUSINESS
INTERNATIONAL BUSINESS MACHINES CORPORATION	ACQUIRE MAINFRAME INFRASTRUCTURE HARDWARE FOR THE NSC AND SSC	\$0.00	\$0.00	2016	8/4/2016	SS001630478	SS001660010	1	OTHER THAN SMALL BUSINESS
PITNEY BOWES GLOBAL FINANCIAL SERVICES LLC	ADD A MACHINE TO CONTRACT AND MERGE CLINS 0007 AND 0008 INTO 1 CLIN.	\$0.00	\$0.00	2016	12/8/2015	SS001360018		5	OTHER THAN SMALL BUSINESS
SOLAR TURBINES INCORPORATED	ADD AS CLAUSE 2352.204-2	\$0.00	\$0.00	2016	3/21/2016	SS000760043		22	OTHER THAN SMALL BUSINESS
ALLIED HEALTH CARE SERVICES	ADMIN MOD TO CHANGE ACCOUNTING DATA.	\$0.00	\$0.00	2015	8/7/2015	SS000860128		32	OTHER THAN SMALL BUSINESS
HELP/SYSTEMS, LLC	ADMINISTRATIVE MODIFICATION FOR HELP/SYSTEMS MAINTENANCE	\$0.00	\$0.00	2016	12/1/2015	SS001650015		1	OTHER THAN SMALL BUSINESS
HELP/SYSTEMS, LLC	ADMINISTRATIVE MODIFICATION FOR HELP/SYSTEMS MAINTENANCE	\$0.00	\$0.00	2016	12/7/2015	SS001650015		2	OTHER THAN SMALL BUSINESS
NATIONAL ACADEMY OF SCIENCES	ADMINISTRATIVE MODIFICATION TO CORRECT DELIVERABLE SCHEDULE ERROR IN NAS/IOM TASK ORDER 0006. IGF::OT::IGF	\$0.00	\$0.00	2016	10/6/2015	6	SS001360048	1	OTHER THAN SMALL BUSINESS

Vendor Name	Description of Requirement	Action Obligation	Base and All Options Value	Fiscal Year	Date Signed	PO/Delivery Order/Task Order/Call#	Parent Contract	Mod #	Contracting Officers Business Size Selection
HERMAN MILLER, INC.	B926 KITSAP/SILVERDALE, WA - DESIGN SERVICES, INSTALLATION SERVICES AND PRODUCT ESTIMATE FOR SYSTEMS FURNITURE.	\$0.00	\$0.00	2015	3/30/2015	SS001530039	SS001260003	1	OTHER THAN SMALL BUSINESS
BAMBOO SOLUTIONS CORP	BAMBOO SOFTWARE SOFTWARE AND MAINTENANCE ENTERPRISE LICENSE.	\$39,889.00	\$0.00	2015	6/30/2015	SS001260080		3	OTHER THAN SMALL BUSINESS
BAMBOO SOLUTIONS CORP	BAMBOO SOFTWARE SOFTWARE AND MAINTENANCE ENTERPRISE LICENSE.	\$39,889.00	\$0.00	2016	5/6/2016	SS001260080		4	OTHER THAN SMALL BUSINESS
HERMAN MILLER, INC.	BARRIER WALL AT PERMANENT WORKSTATION PROJECT - TERRITORIES - MODIFICATION TO EXTEND THE PERIOD OF PERFORMANCE TO 9/25/2016 - 5-31-2017	\$0.00	\$0.00	2016	9/13/2016	SS001231189	SS001260003	3	OTHER THAN SMALL BUSINESS
HERMAN MILLER, INC.	BARRIER WALL PROJECTS - SYSTEMS FURNITURE - FOR BIG SPRINGS, TX; MOUNTAIN HOME, AR; PLAINVIEW, TX - MODIFICATION TO CHANGE PERIOD OF PERFORMANCE TO 9-17-2016 TO 9-12-2017.	\$0.00	\$0.00	2016	9/13/2016	SS001432042	SS001260003	2	OTHER THAN SMALL BUSINESS
HERMAN MILLER, INC.	BARRIER WALL PROJECTS - SYSTEMS FURNITURE - FOR BIG SPRINGS, TX; MOUNTAIN HOME, AR; PLAINVIEW, TX.	\$0.00	\$0.00	2015	9/24/2015	SS001432042	SS001260003	1	OTHER THAN SMALL BUSINESS
HERMAN MILLER, INC.	BARRIER WALL PROJECTS - SYSTEMS FURNITURE - TERRITORIES - HONOLULU, HI AND SAN JUAN TSC, PR - MODIFICATION TO CHANGE THE PERIOD OF PERFORMANCE TO 9-17-2016 - 9-12-2017.	\$0.00	\$0.00	2016	9/13/2016	SS001432043	SS001260003	2	OTHER THAN SMALL BUSINESS
HERMAN MILLER, INC.	BARRIER WALL PROJECTS - SYSTEMS FURNITURE - TERRITORIES - HONOLULU, HI.	\$0.00	\$0.00	2015	9/22/2015	SS001432043	SS001260003	1	OTHER THAN SMALL BUSINESS
BMJ PUBLISHING GROUP LTD	BMJ CLINICAL EVIDENCE EXERCISE OPTION YEAR 1 FOR THE PERIOD OF SEPTEMBER 23, 2015 THROUGH SEPTEMBER 22, 2016.	\$6,295.00	\$0.00	2015	7/1/2015	SS001451140		2	OTHER THAN SMALL BUSINESS
RUMSEY ELECTRIC COMPANY	BREAKER LIFT TRUCK DELIVERY EXTENDED.	\$0.00	\$0.00	2015	5/27/2015	SS001451152		1	SMALL BUSINESS
BROWN, ROY C	BROWN, MC, REG. 10 IGF::CL::IGF CLOSELY ASSOCIATED	\$0.00	\$0.00	2016	2/8/2016		1 SS10154C001	1	SMALL BUSINESS
RICHMOND, CITY OF	BUILDING SANITARY SEWER/STORM FEES IGF::CT::IGF	\$0.00	\$0.00	2015	7/8/2015	SS091551004		1	OTHER THAN SMALL BUSINESS
RICHMOND, CITY OF	BUILDING SANITARY SEWER/STORM FEES IGF::CT::IGF	\$0.00	\$0.00	2015	8/21/2015	SS091551004		2	OTHER THAN SMALL BUSINESS
ADMIRAL ELEVATOR COMPANY, INC.	CARPET TILE INSTALLATION AND REMOVAL SERVICES	\$0.00	\$0.00	2015	4/13/2015	SS001060042		14	SMALL BUSINESS
DALLAS LIGHTHOUSE FOR THE BLIND, INC.	MODIFICATION TO EXERCISE OPTION TO EXTEND SERVICES	\$0.00	\$0.00	2015	1/13/2015	SS061060013		13	SMALL BUSINESS
SOLAR TURBINES INCORPORATED	CHANGE CONTRACTING OFFICER REPRESENTATIVE	\$0.00	\$0.00	2016	3/7/2016	SS000760043		21	OTHER THAN SMALL BUSINESS
HERMAN MILLER, INC.	CHANGE POINT OF CONTACT	\$0.00	\$0.00	2016	3/7/2016	SS000760043		21	OTHER THAN SMALL BUSINESS
HERMAN MILLER, INC.	CHARLOTTE, NC ODAR #RT27 DESIGN, INSTALLATION , ODAR ADDITIONAL HOURS AND PRODUCT FOR SYSTEMS FURNITURE	\$0.00	\$0.00	2016	11/17/2015	SS001530077	SS001260003	2	OTHER THAN SMALL BUSINESS
HERMAN MILLER, INC.	CHICAGO, IL ODAR #AX26 THE OFFICE IS ADDING 7 NEW WORKSTATIONS TO ACCOMMODATE EMPLOYEES MOVING INTERNALLY. DESIGN SERVICES, INSTALLATION SERVICES AND ESTIMATED PRODUCT IS REQUIRED FOR THIS PROJECT.	\$0.00	\$0.00	2016	3/23/2016	SS001530452	SS001260003	1	OTHER THAN SMALL BUSINESS
HERMAN MILLER, INC.	CONCORD, NC #C344 DESIGN, INSTALLATION AND PRODUCT FOR SYSTEMS FURNITURE	\$0.00	\$0.00	2015	6/19/2015	SS001431663	SS001260003	1	OTHER THAN SMALL BUSINESS
NATIONAL ACADEMY OF SCIENCES	CONSENSUS STUDIES TO ASSIST SSA WITH DISABILITY ISSUES IGF::OT::IGF	\$0.00	\$0.00	2015	9/18/2015	SS001360048		4	OTHER THAN SMALL BUSINESS
NATIONAL ACADEMY OF SCIENCES	CONSENSUS STUDY COMMITTEE TO EVALUATE PSYCHOLOGICAL TESTING - MODIFICATION TO CLARIFY "RECOMMENDATIONS" REQUIREMENT IGF::OT::IGF	\$0.00	\$0.00	2015	5/19/2015		4 SS001360048	3	OTHER THAN SMALL BUSINESS
NATIONAL ACADEMY OF SCIENCES	CONSENSUS STUDY COMMITTEE TO EVALUATE PSYCHOLOGICAL TESTING - MODIFICATION TO LESSEN QUALIFICATIONS REQUIREMENT FOR COMMITTEE MEMBERS IGF::OT::IGF	\$0.00	\$0.00	2015	1/9/2015		4 SS001360048	2	OTHER THAN SMALL BUSINESS
SPARTAN ENGINEERING, INC.	CRITIAL FUNCTION FIRE ALARM TESTING - EXERCISE OPTION YEAR FOUR - APRIL 1, 2016 TO MARCH 31, 2017. IGF::CT::IGF	\$10,017.00	\$0.00	2016	1/27/2016	SS091251009		4	SMALL BUSINESS

Vendor Name	Description of Requirement	Action Obligation	Base and All Options Value	Fiscal Year	Date Signed	PO/Delivery Order/Task Order/Call#	Parent Contract	Mod #	Contracting Officers Business Size Selection
	CRITIAL FUNCTION FIRE ALARM TESTING - EXERCISE OPTION YEAR THREE - APRIL 1, 2015 TO MARCH 31, 2016.								
SPARTAN ENGINEERING, INC.	IGF::CT::IGF	\$9,106.00	\$0.00	2015	2/27/2015	SS091251009		3	SMALL BUSINESS
HEALTH MENTAL HYGIENE MD DEPT	DCOSS - ENUMERATION AT BIRTH (EAB) - MARYLAND	\$0.00	\$0.00	2015	12/2/2014	SS000860037		6	OTHER THAN SMALL BUSINESS
HEALTH AND WELFARE IDAHO DEPARTMENT OF	DCOSS-ENUMERATION AT BIRTH (EAB) CONTRACTS - IDAHO	\$0.00	\$0.00	2015	12/1/2014	SS000860029		7	OTHER THAN SMALL BUSINESS
HEALTH AND HOSPITALS LOUISIANA DEPARTMENT OF	DCOSS-ENUMERATION AT BIRTH (EAB) LOUISIANA	\$0.00	\$0.00	2015	12/1/2014	SS000860035		6	OTHER THAN SMALL BUSINESS
HEALTH AND HUMAN RESOURCES WEST VIRGINIA DEPARTMENT OF (0771)	DCOSS-STATE DEATH MATCH-NON-EDR CONTRACTS	\$0.00	\$0.00	2016	8/26/2016	SS000660056		5	OTHER THAN SMALL BUSINESS
POTOMAC EDISON COMPANY, THE	DELIVERY ORDER AGAINST GSA CONTRACT NUMBER GS-00P-08-BSD-0539 TO PROVIDE SERVICE FOR LOCAL DISTRIBUTION OF ELECTRIC POWER AND SPECIAL FACILITY DEDICATED CAPACITY TO THE NATIONAL SUPPORT CENTER IN URBANA MARYLAND THROUGH POTOMAC EDISON. FPDs FUNCTION: IGF::OT::IGF	\$0.00	\$0.00	2016	5/26/2016	SS001530732	GS00P08BSD0539	2	OTHER THAN SMALL BUSINESS
DLT SOLUTIONS INCORPORATED	DELL WINDOWS MANAGEMENT AND QUEST ENTERPRISE SINGLE SIGN-ON SOFTWARE MAINTENANCE. THE PURPOSE OF MODIFICATION NUMBER 000003 IS TO CHANGE THE ACCOUNTING INFORMATION SOC FROM 3152 TO 3125 FOR CLINS 0075 THROUGH 0078.	\$0.00	\$0.00	2016	5/6/2016	SS001530527	W91QUZ06A0004	3	SMALL BUSINESS
DINO SOFTWARE CORPORATION	DINO T-REX SOFTWARE MAINTENANCE. THE PURPOSE OF MODIFICATION NUMBER 01 IS TO EXERCISE OPTION YEAR 1 CLIN 0002 FOR THE PERIOD OF PERFORMANCE FROM SEPTEMBER 30, 2016 THROUGH SEPTEMBER 29, 2017.	\$463,010.69	\$0.00	2016	7/29/2016	SS001550208		1	SMALL BUSINESS
DLT SOLUTIONS INCORPORATED	DISSAO CURRENTLY UTILIZES THE DELL CHANGEAUDITOR SUITE (FORMERLY QUEST) FOR ACTIVE FORENSIC ANALYSIS OF AGENCY USER/WORKSTATION/SERVER RESOURCES AND THE ACTIVE DIRECTORY (AD) INFRASTRUCTURE. OTSO/DISSAO WOULD LIKE TO EXTEND THE FUNCTION OF CHANGEAUDITOR TO INCLUDE SHAREPOINT ACTIVITY. DISSAO CURRENTLY UTILIZES THE DELL CHANGEAUDITOR SUITE (FORMERLY QUEST) FOR ACTIVE FORENSIC ANALYSIS OF AGENCY WORKSTATION/SERVER RESOURCES AND THE ACTIVE DIRECTORY (AD)	\$0.00	\$0.00	2015	6/3/2015	SS001530527	W91QUZ06A0004	1	SMALL BUSINESS
HERMAN MILLER, INC.	DURHAM, NC #R328 RELOCATION - DESIGN, INSTALLATION AND PRODUCT FOR SYSTEMS FURNITURE; MODIFICATION TO ADD 300 DAYS TO PERIOD OF PERFORMANCE.	\$0.00	\$0.00	2016	6/16/2016	SS001530708	SS001260003	1	OTHER THAN SMALL BUSINESS
DLT SOLUTIONS INCORPORATED	EXERCISE AN OPTION FOR THE PERIOD JANUARY 1, 2016 THROUGH APRIL 30, 2016 FOR MAINTENANCE.	\$152,100.00	\$0.00	2016	12/22/2015	SS001431684	W91QUZ06A0004	3	SMALL BUSINESS
PITNEY BOWES GLOBAL FINANCIAL SERVICES LLC	EXERCISE OPTION 3 AND ADD A SECOND ALTERNATE COTR	\$0.00	\$0.00	2016	6/23/2016	SS001360018		6	OTHER THAN SMALL BUSINESS
ROCKET SOFTWARE, INC.	EXERCISE OPTION I FOR THE ANNUAL RENEWAL OF MAINTENANCE ON ROCKET DBS SOFTWARE.	\$581,601.00	\$0.00	2016	8/8/2016	SS001560048		1	OTHER THAN SMALL BUSINESS
INNOVATION DATA PROCESSING, INC.	EXERCISE OPTION YEAR I - SS00-15-50008 - INNOVATION DATA PROCESSING FDR/CPK, ABR/FDRREORG, FDRPAS AND FDRMOVE SOFTWARE	\$332,380.00	\$0.00	2015	3/9/2015	SS001550008		2	OTHER THAN SMALL BUSINESS
PHOENIX SOFTWARE INTERNATIONAL, INC.	EXERCISE OPTION-1,MAINTENANCE ON PHOENIX SOFTWARE PRODUCTS; (E)JENS, FALCON, NEATEST AND LIFEWORKS.	\$1,065,772.00	\$0.00	2016	2/16/2016	SS001560023		2	OTHER THAN SMALL BUSINESS
HOLLINGSWORTH, SHAW	EXTENDING BPA THROUGH MARCH 31, 2018.	\$0.00	\$0.00	2016	7/8/2016	SS040940008		4	SMALL BUSINESS
FALON SOURCING SOLUTIONS LLC	FUND THE CONTRACT FOR 1 MONTH	\$36,425.22	\$0.00	2016	12/23/2015	SS001660005		1	SMALL BUSINESS
RELIASOURCE, INC.	FUNDING IS BEING OBLIGATED TO COVER MODIFICATION 2. NO ADDITIONAL FUNDS ARE PROVIDED. THIS IS AN ADMINISTRATIVE MODIFICATION. IGF::OT::IGF	\$525,961.92	\$0.00	2015	2/4/2015	SS001350271		4	SMALL BUSINESS
SOLAR TURBINES INCORPORATED	GENERATOR MAINTENANCE - NCC MOD TO CHANGE CONTRACT SPECIALIST.	\$0.00	\$0.00	2015	1/16/2015	SS000760043		19	OTHER THAN SMALL BUSINESS
INTEGRATED SECURITY TECHNOLOGIES, INC.	HIGF::CT::IGF ID PIVCLASS MAINTENANCE SERVICE AND SUPPORT AGREEMENT FOR THE NATIONAL SUPPORT CENTER	\$0.00	\$0.00	2017	11/21/2016	SS001650266		1	SMALL BUSINESS
HERMAN MILLER, INC.	HMI FURNITURE FOR PERMANENT WORKSTATION AT BARRIER WALL (PWBW) PROJECT - MODIFICATION TO EXTEND PERIOD OF PERFORMANCE.	\$0.00	\$0.00	2016	9/13/2016	SS001231168	SS001260003	3	OTHER THAN SMALL BUSINESS
ANNAMS SYSTEMS CORPORATION	IGF::CL::IGF MODIFICATION 3 TO UPDATE THE FISMA CLAUSE (CLAUSE 2352.204-2).	\$0.00	\$0.00	2015	1/16/2015	SS001461010		3	SMALL BUSINESS

Vendor Name	Description of Requirement	Action Obligation	Base and All Options Value	Fiscal Year	Date Signed	PO/Delivery Order/Task Order/Call#	Parent Contract	Mod #	Contracting Officers Business Size Selection
ANNAMS SYSTEMS CORPORATION	IGF::CL::IGF MODIFICATION 4 TO UPDATE THE CONTRACT SPECIALIST.	\$0.00	\$0.00	2015	3/5/2015	SS001461010		4	SMALL BUSINESS
COLONIAL PARKING, INC.	IGF::CL::IGF ADMINISTRATIVE MODIFICATION TO CHANGE THE CONTRACTING OFFICER AND THE PURCHASING AGENT TO A CONTRACT THAT PROVIDES PARKING SPACES AND VALIDATIONS STICKERS FOR ITC BUILDING 500 E ST AND WORLD TRADE CENTER 400 VIRGINIA AVE.	\$8,607.74	\$0.00	2015	12/23/2014	SS001461016		3	OTHER THAN SMALL BUSINESS
COLONIAL PARKING, INC.	IGF::CL::IGF ADMINISTRATIVE MODIFICATION TO CHANGE THE CONTRACTING OFFICER AND THE PURCHASING AGENT TO A CONTRACT THAT PROVIDES PARKING SPACES AND VALIDATIONS STICKERS FOR ITC BUILDING 500 E ST AND WORLD TRADE CENTER 400 VIRGINIA AVE.	\$8,607.74	\$0.00	2015	12/23/2014	SS001461016		3	OTHER THAN SMALL BUSINESS
COLONIAL PARKING, INC.	IGF::CL::IGF ADMINISTRATIVE MODIFICATION TO CHANGE THE CONTRACTOR POINT OF CONTACT (POC) ON A CONTRACT THAT PROVIDES PARKING SPACES AND VALIDATIONS STICKERS FOR ITC BUILDING 500 E ST AND WORLD TRADE CENTER 400 VIRGINIA AVE.	\$0.00	\$0.00	2015	2/3/2015	SS001461016		5	OTHER THAN SMALL BUSINESS
COLONIAL PARKING, INC.	IGF::CL::IGF ADMINISTRATIVE MODIFICATION TO CHANGE THE CONTRACTOR POINT OF CONTACT (POC) ON A CONTRACT THAT PROVIDES PARKING SPACES AND VALIDATIONS STICKERS FOR ITC BUILDING 500 E ST AND WORLD TRADE CENTER 400 VIRGINIA AVE.	\$0.00	\$0.00	2015	2/3/2015	SS001461016		5	OTHER THAN SMALL BUSINESS
COLONIAL PARKING, INC.	IGF::CL::IGF EXERCISE OPTION YEAR II WITH COLONIAL PARKING WHICH PROVIDES PARKING SPACES AND VALIDATIONS STICKERS FOR ITC BUILDING 500 E ST AND WORLD TRADE CENTER 400 VIRGINIA AVE.	\$108,118.70	\$0.00	2016	12/28/2015	SS001461016		6	OTHER THAN SMALL BUSINESS
COLONIAL PARKING, INC.	IGF::CL::IGF EXERCISE OPTION YEAR II WITH COLONIAL PARKING WHICH PROVIDES PARKING SPACES AND VALIDATIONS STICKERS FOR ITC BUILDING 500 E ST AND WORLD TRADE CENTER 400 VIRGINIA AVE.	\$108,118.70	\$0.00	2016	12/28/2015	SS001461016		6	OTHER THAN SMALL BUSINESS
SIGNET TECHNOLOGIES, INC.	IGF::CT::IGF - ENHANCED SERVICE PLAN FOR THE INTEGRATED LENEL ONGUARD SECURITY MANAGEMENT SYSTEMS - CORRECT ACCOUNTING STRING	\$0.00	\$0.00	2016	8/15/2016	SS001550198		2	SMALL BUSINESS
SIGNET TECHNOLOGIES, INC.	IGF::CT::IGF - ENHANCED SERVICE PLAN FOR THE INTEGRATED LENEL ONGUARD SECURITY MANAGEMENT SYSTEMS - OPTION PERIOD I EXERCISE	\$98,268.00	\$0.00	2016	7/25/2016	SS001550198		1	SMALL BUSINESS
WELCH CONSULTING, LTD	IGF::CT::IGF - EXPERT WITNESS SERVICES TO PROVIDE ASSISTANCE FOR CLASS ACTION CASES - ADMINISTRATIVE MODIFICATION TO UPDATE SECTION C3-20, AGENCY SPECIFIC CLAUSE 2352.232-1, INVOICE SUBMISSION AND PAYMENT RELATED INFORMATION (SEP 2016).	\$0.00	\$0.00	2017	11/8/2016	SS001461104		9	OTHER THAN SMALL BUSINESS
WELCH CONSULTING, LTD	IGF::CT::IGF - EXPERT WITNESS SERVICES TO PROVIDE ASSISTANCE FOR CLASS ACTION CASES - EXERCISE OPTION PERIOD I	\$24,000.00	\$0.00	2015	6/11/2015	SS001461104		3	OTHER THAN SMALL BUSINESS
MICROSOFT CORPORATION SITZ IN REDMOND CORPORATION	IGF::CT::IGF MODIFICATION 0001 TO TASK ORDER 27 AGAINST CONTRACT NUMBER SS00-13-60014 WITH MICROSOFT FOR OIG INVESTIGATIVE CASE MANAGEMENT TO CHANGE THE TASK MANAGER DESIGNATION.	\$0.00	\$0.00	2017	11/4/2016	27 SS001360014		2	OTHER THAN SMALL BUSINESS
MICROSOFT CORPORATION SITZ IN REDMOND CORPORATION	IGF::CT::IGF MODIFICATION 1 IS TO CHANGE THE SECURITY CLASSIFICATION LEVEL FROM 5C TO 6C FOR MICROSOFT SYSTEM CENTER CONFIGURATION MANAGER FOR THE DIVISION OF INTEGRATION AND ENVIRONMENTAL TESTING	\$0.00	\$0.00	2017	11/4/2016	30 SS001360014		1	OTHER THAN SMALL BUSINESS
POINT SECURITY, INC.	IGF::CT::IGF - MODIFICATION 1 TO PURCHASE ORDER SS00-14-51171 WITH POINT SECURITY, INC. FOR "ONE-YEAR ON-SITE FULL COVERAGE MAINTENANCE AGREEMENT" FOR X-RAY MACHINES. THE PURPOSE OF THIS MODIFICATION IS TO CHANGE THE CONTRACT SPECIALIST.	\$0.00	\$0.00	2015	1/5/2015	SS001451171		1	SMALL BUSINESS

Vendor Name	Description of Requirement	Action Obligation	Base and All Options Value	Fiscal Year	Date Signed	PO/Delivery Order/Task Order/Call#	Parent Contract	Mod #	Contracting Officers Business Size Selection
SCHNEIDER ELECTRIC USA, INC.	IGF::CT::IGF - MODIFICATION 1 TO PURCHASE ORDER SS00-15-50276 FOR TECHNICAL SUPPORT, PREVENTIVE AND ON-SITE MAINTENANCE, AND REMOTE DIAGNOSTIC SUPPORT FOR THE SCHNEIDER ELECTRIC POWERLOGIC MONITORING SYSTEM AT THE SOCIAL SECURITY ADMINISTRATION MAIN CAMPUS BUILDINGS AND NATIONAL COMPUTER CENTER IN BALTIMORE, MD. THE PURPOSE OF THIS MODIFICATION TO ADD AGENCY SPECIFIC (AS) CLAUSE 2352.204-2, FEDERAL INFORMATION SECURITY MANAGEMENT ACT (FISMA) AND AGENCY PRIVACY MANAGEMENT (DEC 2014).	\$0.00	\$0.00	2016	4/6/2016	SS001550276		1	OTHER THAN SMALL BUSINESS
SCHNEIDER ELECTRIC USA, INC.	IGF::CT::IGF - MODIFICATION 2 TO PURCHASE ORDER SS00-15-50276 FOR TECHNICAL SUPPORT, PREVENTIVE AND ON-SITE MAINTENANCE, AND REMOTE DIAGNOSTIC SUPPORT FOR THE SCHNEIDER ELECTRIC POWERLOGIC MONITORING SYSTEM AT THE SOCIAL SECURITY ADMINISTRATION MAIN CAMPUS BUILDINGS AND NATIONAL COMPUTER CENTER IN BALTIMORE, MD. THE PURPOSE OF THIS MODIFICATION TO EXERCISE OPTION YEAR I.	\$35,861.72	\$0.00	2016	8/2/2016	SS001550276		2	OTHER THAN SMALL BUSINESS
WELCH CONSULTING, LTD	IGF::CT::IGF EXPERT WITNESS SERVICES	\$0.00	\$0.00	2016	10/15/2015	SS001461104		4	OTHER THAN SMALL BUSINESS
WELCH CONSULTING, LTD	IGF::CT::IGF EXPERT WITNESS SERVICES	\$0.00	\$0.00	2016	1/4/2016	SS001461104		5	OTHER THAN SMALL BUSINESS
WELCH CONSULTING, LTD	IGF::CT::IGF  THE PURPOSE OF THIS BILATERAL MODIFICATION IS TO:  1) MODIFY CLIN 0005 TO REFLECT AS SHOWN HEREIN TO ACKNOWLEDGE THE ADDITION OF SERVICES FROM SPEAKMAN - CONSULTING EXPERT, OPTION PERIOD I; 2) ADD SECTION C1-6, FAR CLAUSE 52.212-4, ALTERNATE I, INADVERTENTLY LEFT OFF BASE AWARD; 3) REVISE SECTION C3-2 TO ACKNOWLEDGE AN UPDATES TO AGENCY SPECIFIC CLAUSE REGARDING FISMA; AND 4) REVISE SECTIONS C3-5, AND C3-11 TO ACKNOWLEDGE A CHANGE IN GOVERNMENT CONTRACTING PERSONNEL.	\$0.00	\$0.00	2016	4/21/2016	SS001461104		6	OTHER THAN SMALL BUSINESS
RGF CONSULTING CORP.	IGF::CT::IGF ATTACHED ASSIGNMENT OF CLAIMS SS00-12-60001, MODIFICATION NUMBER 9	\$0.00	\$0.00	2015	5/12/2015	SS001260001		9	SMALL BUSINESS
RGF CONSULTING CORP.	IGF::CT::IGF LABOR SERVICE CHANGE CONTRACT SPECIALIST "CRITICAL FUNCTION" SS00-12-60001, MODIFICATION NUMBER 8	\$0.00	\$0.00	2015	12/22/2014	SS001260001		8	SMALL BUSINESS
COMPUWARE CORPORATION	IGF::CT::IGF SOLE SOURCE PURCHASE ORDER TO PROVIDE MODIFICATIONS TO COMPUWARE WORKBENCH SOFTWARE TO ISOLATE AND SANITIZE PERSONALLY IDENTIFIABLE INFORMATION/FEDERAL TAX INFORMATION (PII/FTI) DATA. THE PURPOSE OF THIS MODIFICATION IS TO IMPLEMENT THE CONTRACTOR'S QUOTATION AND INCORPORATE A NEWLY-RELEASED FAR CLASS DEVIATION.	\$0.00	\$0.00	2015	3/23/2015	SS001560020		1	OTHER THAN SMALL BUSINESS
KEYPOINT GOVERNMENT SOLUTIONS, INC.	IGF::CT::IGF  BACKGROUND INVESTIGATIONS FOR ADMINISTRATIVE LAW JUDGES MOD #1 - TO CHANGE COR AND ALTCOR AND CHANGE FORM (ATTACHMENT)	\$0.00	\$0.00	2016	8/12/2016	SS001660026		1	OTHER THAN SMALL BUSINESS
KEYPOINT GOVERNMENT SOLUTIONS, INC.	IGF::CT::IGF  BACKGROUND INVESTIGATIONS FOR ADMINISTRATIVE LAW JUDGES MOD #2 - TO REVISE THE SOW	\$0.00	\$0.00	2016	9/7/2016	SS001660026		2	OTHER THAN SMALL BUSINESS

Vendor Name	Description of Requirement	Action Obligation	Base and All Options Value	Fiscal Year	Date Signed	PO/Delivery Order/Task Order/Call#	Parent Contract	Mod #	Contracting Officers Business Size Selection
IRON DATA SOLUTIONS, INC. (DE)	IGF::CT::IGF  CONTRACT SS00-11-60059, TASK ORDER 0062: IRON DATA SOLUTIONS, INC. NATIONAL VENDOR FILE (NVF)SYNCHRONIZATION SUPPORT PHASE II - MODIFICATION 001 TO EXTEND PERIOD OF PERFORMANCE AT NO COST TO EITHER PARTY, PER AUTHORITY OF FAR 52.212-4(C), CHANGES.	\$0.00	\$0.00	2015	3/4/2015	62	SS001160059	1	OTHER THAN SMALL BUSINESS
MICROSOFT CORPORATION SITZ IN REDMOND CORPORATION	IGF::CT::IGF  MOD 04 TO SS00-13-60014 IS TO UPDATE THE FISMA CLAUSE (CLAUSE 2352.204-2).	\$0.00	\$0.00	2015	2/6/2015	SS001360014		4	OTHER THAN SMALL BUSINESS
MICROSOFT CORPORATION SITZ IN REDMOND CORPORATION	IGF::CT::IGF  MODIFICATION 1 TO MICROSOFT TASK ORDER 11 WHICH PROVIDES EXPERT SERVICES TO DEVELOP AN HA AND DR SOLUTION FOR ENTERPRISE MICROSOFT SQL SERVER 2012. THE PURPOSE OF THIS MODIFICATION IS TO EXTEND THE PERIOD OF PERFORMANCE TO ALLOW ADDITIONAL TIME FOR PROPER TESTING OF THE FINAL DELIVERABLES DUE TO DELAYS AT THE START OF THE TASK ORDER.	\$0.00	\$0.00	2015	3/27/2015	11	SS001360014	1	OTHER THAN SMALL BUSINESS
MICROSOFT CORPORATION SITZ IN REDMOND CORPORATION	IGF::CT::IGF  MODIFICATION 5 IS TO EXERCISE OPTION YEAR 2 FROM JULY 8, 2015 - JULY 7 2016 AND TO CHANGE THE CONTRACTING OFFICER FOR THE MICROSOFT CONTRACT.	\$0.00	\$0.00	2015	5/4/2015	SS001360014		5	OTHER THAN SMALL BUSINESS
MICROSOFT CORPORATION SITZ IN REDMOND CORPORATION	IGF::CT::IGF  MODIFICATION 6 IS TO EXERCISE OPTION YEAR 3 FROM JULY 8, 2016 - JULY 7, 2017 OF THE MICROSOFT CONTRACT.	\$0.00	\$0.00	2016	6/2/2016	SS001360014		6	OTHER THAN SMALL BUSINESS
AMERICAN MEDICAL ASSOCIATION	IGF::CT::IGF AMERICAN MEDICAL ASSOCIATION CODEMANAGER SUBSCRIPTION RENEWAL	\$9,180.00	\$0.00	2015	8/13/2015	SS001451239		1	OTHER THAN SMALL BUSINESS
NEOPOST USA INC.	IGF::CT::IGF CHANGE COR AND ALTERNATE COR	\$0.00	\$0.00	2016	7/13/2016	SS001550057		3	OTHER THAN SMALL BUSINESS
FACTIVA, INC	IGF::CT::IGF EXERCISE OPTION YEAR 1 FOR SUBSCRIPTION RENEWAL OF FACTIVA.COM	\$209,789.00	\$0.00	2016	6/29/2016	SS001550153		1	OTHER THAN SMALL BUSINESS
FALON SOURCING SOLUTIONS LLC	IGF::CT::IGF FUND CONTRACT FOR 1 MONTH	\$75,694.78	\$0.00	2016	12/17/2015	SS001660006		1	SMALL BUSINESS
NATIONAL GRID USA SERVICE COMPANY, INC.	IGF::CT::IGF GAS UTILITY SERVICE TO THE ADDABBO BUILDING, 155-10 JAMAICA AVE, JAMAICA NY 11432 FROM 08/01/2014 TO 07/31/2015.	\$0.00	\$0.00	2016	3/3/2016	SS021431025	GS00P12BSD0879	2	OTHER THAN SMALL BUSINESS
NATIONAL GRID USA SERVICE COMPANY, INC.	IGF::CT::IGF GAS UTILITY SERVICE TO THE ADDABBO BUILDING, 155-10 JAMAICA AVE, JAMAICA NY 11432 FROM 08/01/2015 TO 07/31/2016.	\$0.00	\$0.00	2016	11/25/2015	SS021530007	GS00P12BSD0879	1	OTHER THAN SMALL BUSINESS
TETON DATA SYSTEMS INC	IGF::CT::IGF MODIFICATION TO FULLY FUND TASK ORDER FOR OPTION PERIOD 1 FOR TETON STATI REF SUBSCRIPTION	\$353,718.75	\$0.00	2016	1/19/2016	SS001550052		3	SMALL BUSINESS
OBERTHUR TECHNOLOGIES OF AMERICA CORP	IGF::CT::IGF MODIFICATION TO CHANGE SOC ON LINE ITEMS FROM 3152 TO 3125.	\$0.00	\$0.00	2016	8/11/2016	SS001650188		1	OTHER THAN SMALL BUSINESS
NATIONAL JOURNAL GROUP INC	IGF::CT::IGF MODIFICATION TO CHANGE THE ASSIGNED PURCHASING AGENT.	\$0.00	\$0.00	2016	11/16/2015	SS001451124		3	OTHER THAN SMALL BUSINESS
COMPU-TECTURE, INC.	IGF::CT::IGF MODIFICATION TO EXERCISE OPTION YEAR 1	\$37,000.00	\$0.00	2015	6/18/2015	SS001451156		2	SMALL BUSINESS
NATIONAL JOURNAL GROUP INC	IGF::CT::IGF MODIFICATION TO EXERCISE OPTION YEAR 1 AND OBLIGATE FUNDING FOR THE NATIONAL JOURNAL DATABASE SUBSCRIPTION	\$38,383.00	\$0.00	2015	5/27/2015	SS001451124		2	OTHER THAN SMALL BUSINESS



Vendor Name	Description of Requirement	Action Obligation	Base and All Options Value	Fiscal Year	Date Signed	PO/Delivery Order/Task Order/Call#	Parent Contract	Mod #	Contracting Officers Business Size Selection
WILLIAM S. HEIN & CO., INC.	IGF::CT::IGF MODIFICATION TO EXERCISE OPTION YEAR 1 UNDER PURCHASE ORDER SS00-14-51149	\$40,325.00	\$0.00	2015	5/26/2015	SS001451149		2	SMALL BUSINESS
COMPU-TECTURE, INC.	IGF::CT::IGF MODIFICATION TO EXERCISE OPTION YEAR 2	\$37,000.00	\$0.00	2016	7/14/2016	SS001451156		3	SMALL BUSINESS
WILLIAM S. HEIN & CO., INC.	IGF::CT::IGF MODIFICATION TO EXERCISE OPTION YEAR 2 UNDER PURCHASE ORDER SS00-14-51149	\$42,345.00	\$0.00	2016	4/21/2016	SS001451149		3	SMALL BUSINESS
NATIONAL JOURNAL GROUP INC	IGF::CT::IGF MODIFICATION TO EXERCISE OPTION YEAR 2.	\$41,070.00	\$0.00	2016	4/28/2016	SS001451124		4	OTHER THAN SMALL BUSINESS
FALON SOURCING SOLUTIONS LLC	IGF::CT::IGF MODIFICATION TO FUND REMAINDER OF CONTRACT	\$832,642.58	\$0.00	2016	1/19/2016	SS001660006		2	SMALL BUSINESS
FALON SOURCING SOLUTIONS LLC	IGF::CT::IGF MODIFICATION TO FUND THE REMAINDER OF CONTRACT	\$400,677.42	\$0.00	2016	1/19/2016	SS001660005		2	SMALL BUSINESS
CONSOLIDATED EDISON COMPANY OF NEW YORK, INC.	IGF::CT::IGF PROVIDE ELECTRIC UTILITU TRANSMISSION AND DISTRIBUTION SERVICE AT THE ADDABO FEDERAL BUILDING	\$0.00	\$0.00	2016	5/16/2016	SS021630006	GS00P14BSD1058	1	OTHER THAN SMALL BUSINESS
TETON DATA SYSTEMS INC	IGF::CT::IGF STATIREF SUBSCRIPTION RENEWAL	\$0.00	\$0.00	2015	3/19/2015	SS001550052		1	SMALL BUSINESS
TETON DATA SYSTEMS INC	IGF::CT::IGF TETON STATIREF SUBSCRIPTION RENEWAL, EXERCISE OPTION YEAR 1	\$32,156.25	\$0.00	2016	12/29/2015	SS001550052		2	SMALL BUSINESS
WELCH CONSULTING, LTD	IGF::CT::IGF: EXPERT WITNESS SERVICES	\$0.00	\$0.00	2016	10/16/2015	SS001360024		6	OTHER THAN SMALL BUSINESS
WELCH CONSULTING, LTD	IGF::CT::IGF: EXPERT WITNESS SERVICES MODIFICATION 7 IS BEING ISSUED TO CHANGE THE POINT OF CONTACT INFORMATION .	\$0.00	\$0.00	2016	1/4/2016	SS001360024		7	OTHER THAN SMALL BUSINESS
HENSEL PHELPS SERVICES LLC	IGF::OT::IGF	\$0.00	\$0.00	2016	12/10/2015	SS001461106		7	OTHER THAN SMALL BUSINESS
BOWHEAD PROFESSIONAL SOLUTIONS, LLC	IGF::OT::IGF - EXERCISE OPTION YEAR TWO	\$0.00	\$0.00	2015	6/2/2015	SS001461008		3	SMALL BUSINESS
PARTNERSHIP FOR PUBLIC SERVICE, INC.	IGF::OT::IGF - MEMBERSHIP IN FEDERAL HUMAN CAPITAL COLLABORATIVE - EXERCISE OF OPTION PERIOD I	\$25,000.00	\$0.00	2015	8/20/2015	SS001451288		1	OTHER THAN SMALL BUSINESS
PARTNERSHIP FOR PUBLIC SERVICE, INC.	IGF::OT::IGF - MEMBERSHIP IN FEDERAL HUMAN CAPITAL COLLABORATIVE - EXERCISE OF OPTION PERIOD II	\$25,000.00	\$0.00	2016	9/27/2016	SS001451288		2	OTHER THAN SMALL BUSINESS
TCG PROPERTY CORPORATION	IGF::OT::IGF - MODIFICATION 1 TO CONTRACT SS00-15-60056 FOR MECHANICAL MAINTENANCE, CUSTODIAL, AND TRASH SORTING SERVICES AT THE SOCIAL SECURITY ADMINISTRATION'S SECURITY WEST BUILDING IN BALTIMORE, MD. THE PURPOSE OF THIS MODIFICATION IS TO FULLY FUND LINE ITEMS 0002 AND 0003.	\$132,607.20	\$0.00	2016	1/5/2016	SS001560056		1	SMALL BUSINESS
BOWHEAD PROFESSIONAL SOLUTIONS, LLC	IGF::OT::IGF - MODIFICATION TO ADD AGENCY CLAUSE	\$0.00	\$0.00	2016	5/23/2016	SS001461008		4	SMALL BUSINESS
BOWHEAD PROFESSIONAL SOLUTIONS, LLC	IGF::OT::IGF - MODIFICATION TO EXERCISE OPTION YEAR 3	\$0.00	\$0.00	2016	5/31/2016	SS001461008		5	SMALL BUSINESS
HENSEL PHELPS SERVICES LLC	IGF::OT::IGF NATIONAL SUPPORT CENTER (NSC) OPERATIONS AND MAINTENANCE MOD 2 SUPPLEMENTAL AGREEMENT WITHIN SCOPE	\$0.00	\$0.00	2015	12/8/2014	SS001461106		2	OTHER THAN SMALL BUSINESS
HENSEL PHELPS SERVICES LLC	IGF::OT::IGF NATIONAL SUPPORT CENTER (NSC) OPERATIONS AND MAINTENANCE MOD 4: ADMINISTRATIVE MOD	\$0.00	\$0.00	2015	5/14/2015	SS001461106		4	OTHER THAN SMALL BUSINESS
HENSEL PHELPS SERVICES LLC	IGF::OT::IGF NATIONAL SUPPORT CENTER (NSC) OPERATIONS AND MAINTENANCE MOD 4: ADMINISTRATIVE MOD	\$0.00	\$0.00	2016	10/27/2015	SS001461106		6	OTHER THAN SMALL BUSINESS
HENSEL PHELPS SERVICES LLC	IGF::OT::IGF NATIONAL SUPPORT CENTER (NSC) OPERATIONS AND MAINTENANCE MOD 4: ADMINISTRATIVE MOD	\$6,360,948.96	\$0.00	2015	7/17/2015	SS001461106		5	OTHER THAN SMALL BUSINESS
AVANTGARDE TRANSLATIONS, INC.	IGF::OT::IGF OTHER FUNCTION  THE PURPOSE OF THIS MODIFICATION IS TO CHANGE THE CONTRACTING OFFICER REPRESENTATIVE (COR) FROM VICTORIA RICHARDS TO MARICELA ESQUILIN AND REPLACE THE ALTERNATE (COR) WITH VICTORIA RICHARDS. SEE ATTACHMENT I AND ATTACHMENT II FOR INVOICE CHANGES.  ALL OTHER TERMS AND CONDITIONS REMAIN UNCHANGED.	\$0.00	\$0.00	2017	10/19/2016	SS001260096		10	SMALL BUSINESS

Vendor Name	Description of Requirement	Action Obligation	Base and All Options Value	Fiscal Year	Date Signed	PO/Delivery Order/Task Order/Call#	Parent Contract	Mod #	Contracting Officers Business Size Selection
AVANTGARDE TRANSLATIONS, INC.	IGF::OT::IGF OTHER FUNCTION THE PURPOSE OF THIS MODIFICATION IS TO ADD CLAUSE 2352.204-2 FEDERAL INFORMATION SECURITY MANAGEMENT ACT (FISMA) AND AGENCY PRIVACY MANAGEMENT (DEC 2014). SEE ATTACHMENT.								
AVANTGARDE TRANSLATIONS, INC.	ALL OTHER TERMS AND CONDITIONS REMAIN UNCHANGED.	\$0.00	\$0.00	2016	3/8/2016	SS001260096		8	SMALL BUSINESS
AVANTGARDE TRANSLATIONS, INC.	IGF::OT::IGF OTHER FUNCTION THE PURPOSE OF THIS MODIFICATION IS TO EXERCISE OPTION YEAR FOUR PERIOD OF PERFORMANCE 09/30/2016 - 09/29/2017 AND TO INCORPORATE THE WAGE DETERMINATION FOR THE FOREIGN LANGUAGE TRANSLATOR. SEE ATTACHMENT.								
AVANTGARDE TRANSLATIONS, INC.	ALL OTHER TERMS AND CONDITIONS REMAIN UNCHANGED.	\$0.00	\$0.00	2016	8/4/2016	SS001260096		9	SMALL BUSINESS
AVANTGARDE TRANSLATIONS, INC.	IGF::OT::IGF OTHER FUNCTION THE PURPOSE OF THIS MODIFICATION IS TO EXERCISE OPTION YEAR THREE AND TO INCORPORATE THE WAGE DETERMINATION FOR THE FOREIGN LANGUAGE TRANSLATOR. SEE ATTACHMENT.								
AVANTGARDE TRANSLATIONS, INC.	ALL OTHER TERMS AND CONDITIONS REMAIN UNCHANGED.	\$0.00	\$0.00	2015	7/1/2015	SS001260096		7	SMALL BUSINESS
SABREE, INC.	IGF::OT::IGF  CAGE CODE: 4KUQ1  REMOVAL OF CARPET TILE/FLOOR TILE AND REPLACE OF FLOOR TILE PROVIDED BY THE GOVERNMENT IN ROOM G52 ALTMAYER BUILDING. NOTICE TO PROCEED	\$0.00	\$0.00	2015	1/29/2015	SS001530233	SS001461113	1	SMALL BUSINESS
CREATIVE BUSINESS SOLUTIONS, INC.	IGF::OT::IGF  CAGE CODE: 7GN43  EXERCISE OPTION YEAR I. FOR LABOR AND MOVING SERVICE CONTRACT	\$1,424,272.48	\$0.00	2016	7/29/2016	SS001560040		3	SMALL BUSINESS
MICROSOFT CORPORATION SITZ IN REDMOND CORPORATION	IGF::OT::IGF  MOD 02 TO TASK ORDER 10 AGAINST MICROSOFT CONTRACT. THE PURPOSE OF THIS MODIFICATION IS TO PROVIDE ADDITIONAL FUNDING DUE TO THE CONTINUING RESOLUTION.	\$80,263.50	\$0.00	2015	12/19/2014	10	SS001360014	2	OTHER THAN SMALL BUSINESS
MICROSOFT CORPORATION SITZ IN REDMOND CORPORATION	IGF::OT::IGF  MOD 03 TO TASK ORDER 10 AGAINST MICROSOFT CONTRACT. THE PURPOSE OF THIS MODIFICATION IS TO PROVIDE FULL FUNDING DUE TO FY2015 BUDGET PASSAGE.	\$321,054.00	\$0.00	2015	1/14/2015	10	SS001360014	3	OTHER THAN SMALL BUSINESS
CRA INTERNATIONAL, INC.	IGF::OT::IGF ADMINISTRATIVE MODIFICATION TO CHANGE THE CO AND POC.	\$0.00	\$0.00	2016	1/7/2016	SS001560036		6	OTHER THAN SMALL BUSINESS
NATIONAL ACADEMY OF SCIENCES	IGF::OT::IGF CONSENSUS STUDIES TO ASSIST SSA WITH DISABILITY ISSUES - BILATERAL MODIFICATION TO UPDATE THE CONTRACT SPECIALIST AND TO ADD A CLAUSE TO ALLOW FOR THE DESIGNATION OF TASK MANAGERS.	\$0.00	\$0.00	2016	8/22/2016	SS001360048		6	OTHER THAN SMALL BUSINESS
NATIONAL ACADEMY OF SCIENCES	IGF::OT::IGF CONSENSUS STUDIES TO ASSIST SSA WITH DISABILITY ISSUES - MODIFICATION TO UPDATE INDIRECT COST RATES IN THE CONTRACT TO REFLECT CONTRACTOR'S NEGOTIATED FORWARD PRICING RATE AGREEMENT, AND OTHER ADMINISTRATIVE CHANGES.	\$0.00	\$0.00	2016	3/1/2016	SS001360048		5	OTHER THAN SMALL BUSINESS
CRA INTERNATIONAL, INC.	IGF::OT::IGF EXPERT WITNESS CONSULTING SERVICES	\$0.00	\$0.00	2016	10/8/2015	SS001560036		2	OTHER THAN SMALL BUSINESS
CRA INTERNATIONAL, INC.	IGF::OT::IGF EXPERT WITNESS CONSULTING SERVICES	\$0.00	\$0.00	2016	11/20/2015	SS001560036		3	OTHER THAN SMALL BUSINESS

Vendor Name	Description of Requirement	Action Obligation	Base and All Options Value	Fiscal Year	Date Signed	PO/Delivery Order/Task Order/Call#	Parent Contract	Mod #	Contracting Officers Business Size Selection
DREAM MANAGEMENT, INC.	IGF::OT::IGF MAKE ADMINISTRATIVE CHANGES TO CONTRACT.	\$0.00	\$0.00	2016	10/1/2015	SS001260085		10	SMALL BUSINESS
SKILLTRAN LLC	IGF::OT::IGF MODIFICATION TO ADD FAR CLAUSE 52.217-9 TO PURCHASE ORDER.	\$0.00	\$0.00	2016	10/26/2015	SS001550224		1	OTHER THAN SMALL BUSINESS
BOWHEAD PROFESSIONAL SOLUTIONS, LLC	IGF::OT::IGF - MODIFICATION TO ADD GA EXPENSE TO TRAVEL CLINS	\$0.00	\$0.00	2015	3/31/2015	SS001461008		2	SMALL BUSINESS
SKILLTRAN LLC	IGF::OT::IGF MODIFICATION TO EXERCISE OPTION YEAR I OF OCCUBROWSE SUBSCRIPTION AND OBLIGATE FUNDING FOR THE OPTION YEAR.	\$70,000.00	\$0.00	2016	5/11/2016	SS001550224		3	OTHER THAN SMALL BUSINESS
SKILLTRAN LLC	IGF::OT::IGF MODIFICATION TO EXTEND THE PERIOD OF PERFORMANCE THAT END USERS RECEIVE THE CD-ROM VERSION OF THE OCCUBROWSE SUBSCRIPTION.	\$0.00	\$0.00	2016	12/29/2015	SS001550224		2	OTHER THAN SMALL BUSINESS
DREAM MANAGEMENT, INC.	IGF::OT::IGF SS00-12-60085 EXERCISE OPTION YEAR II	\$0.00	\$0.00	2015	3/18/2015	SS001260085		7	SMALL BUSINESS
NATIONAL ACADEMY OF SCIENCES	IGF::OT::IGF THE PURPOSE OF THIS MODIFICATION IS TO UPDATE AS CLAUSE 2352.232-1 IN ACCORDANCE WITH HANDBOOK TRANSMITTAL 16-13.	\$0.00	\$0.00	2017	11/18/2016	SS001360048		7	OTHER THAN SMALL BUSINESS
CRA INTERNATIONAL, INC.	IGF::OT::IGF UNILATERAL MODIFICATION TO CORRECT TWO (2) CLERICAL ERRORS ON THE FACE OF THE STANDARD FORM 30 (SF-30) FOR MODIFICATION #4:	\$0.00	\$0.00	2016	12/21/2015	SS001560036		5	OTHER THAN SMALL BUSINESS
SABREE, INC.	IGF::OT::IGF EXERCISE OPTION II FOR CLIN 0255 FOR BONDING	\$0.00	\$0.00	2016	9/9/2016	SS001461113		6	SMALL BUSINESS
NEOPOST USA INC.	IGF::OT::IGF EXERCISE OPTION YEAR FOR STANDARD MAINTENANCE OF THE NEOPOST FOLDER INSERTER SYSTEM.	\$5,634.12	\$0.00	2017	11/28/2016	SS041650003		4	OTHER THAN SMALL BUSINESS
SCHNEIDER ELECTRIC USA, INC.	IGF::OT::IGF EXERCISE OPTION YEAR I  TECHNICAL SUPPORT, PREVENTIVE MAINTENANCE, ON-SITE MAINTENANCE, AND REMOTE DIAGNOSTIC SUPPORT FOR THE SCHNEIDER ELECTRIC POWERLOGIC MONITORING SYSTEM AT THE SOCIAL SECURITY ADMINISTRATIONS SECURITY WEST BUILDING.	\$16,483.36	\$0.00	2016	8/31/2016	SS001550277		1	OTHER THAN SMALL BUSINESS
EATON CORPORATION	IGF::OT::IGF MOD 1 TO ADD COTR AS AN ORDERING OFFICIAL.	\$0.00	\$0.00	2016	1/13/2016	SS001560064		1	OTHER THAN SMALL BUSINESS
EATON CORPORATION	IGF::OT::IGF MOD 2 TO EXERCISE OPTION YEAR 1.	\$143,959.92	\$0.00	2016	9/12/2016	SS001560064		2	OTHER THAN SMALL BUSINESS
AMERICAN SOCIETY FOR TRAINING AND DEVELOPMENT, INCORPORATED	IGF::OT::IGF OTHER FUNCTION MODIFICATION TO CHANGE THE ASSIGNED PURCHASING AGENT	\$0.00	\$0.00	2015	12/1/2014	SS001451197		1	OTHER THAN SMALL BUSINESS
NEOPOST USA INC.	IGF::OT::IGF STANDARD MAINTENANCE FOR NEOPOST FOLDER INSERTER	\$0.00	\$0.00	2016	8/10/2016	SS041650003		1	OTHER THAN SMALL BUSINESS
FIRE & LIFE SAFETY AMERICA, INC.	IGF::OT::IGF THE PURPOSE OF MODIFICATION 002 IS TO EXTEND THE PERIOD OF PERFORMANCE	\$0.00	\$0.00	2016	7/20/2016	SS001650137		2	OTHER THAN SMALL BUSINESS
FIRE & LIFE SAFETY AMERICA, INC.	IGF::OT::IGF THE PURPOSE OF MODIFICATION 003 IS TO EXTEND THE PERIOD OF PERFORMANCE	\$0.00	\$0.00	2016	8/19/2016	SS001650137		3	OTHER THAN SMALL BUSINESS
FIRE & LIFE SAFETY AMERICA, INC.	IGF::OT::IGF THE PURPOSE OF THIS PURCHASE ORDER IS TO HAVE FIRE AND LIFE SAFETY AMERICA COME OUT AND REPAIR TWO FIRE PUMPS.	\$0.00	\$0.00	2016	6/24/2016	SS001650137		1	OTHER THAN SMALL BUSINESS
SABREE, INC.	IGF::OT::IGF UPDATE CONTRACT SECTIONS G-2, G-3 AND H-15	\$0.00	\$0.00	2016	3/31/2016	SS001461113		3	SMALL BUSINESS
CREATIVE BUSINESS SOLUTIONS, INC.	IGF::OT::IGF UPDATE CONTRACTORS DUNS INFORMATION	\$0.00	\$0.00	2015	9/1/2015	SS001560040		1	SMALL BUSINESS
CREATIVE BUSINESS SOLUTIONS, INC.	IGF::OT::IGF UPDATE CONTRACTORS DUNS INFORMATION	\$0.00	\$0.00	2016	10/16/2015	SS001560040		2	SMALL BUSINESS
SABREE, INC.	IGF::OT::IGF  EXERCISE OPTION YEAR I.  ASBESTOS RENOVATION AND REMOVAL SERVICES AT THE SOCIAL SECURITY ADMINISTRATION'S HEADQUARTERS BUILDINGS AND OUTLYING BUILDINGS LOCATED IN BALTIMORE COUNTY AND BALTIMORE, MD	\$0.00	\$0.00	2015	7/22/2015	SS001461113		2	SMALL BUSINESS

Vendor Name	Description of Requirement	Action Obligation	Base and All Options Value	Fiscal Year	Date Signed	PO/Delivery Order/Task Order/Call#	Parent Contract	Mod #	Contracting Officers Business Size Selection
OUTTZ, JAMES & ASSOCIATES	IGF::OT::IGF EXPERT WITNESS CONSULTING SERVICES	\$0.00	\$0.00	2016	10/8/2015	SS001560037		1	SMALL BUSINESS
MICROSOFT CORPORATION SITZ IN REDMOND CORPORATION	IGF::OT::IGF MOD 01 TO TASK ORDER 15 AGAINST MICROSOFT CONTRACT TO ADD ADDITIONAL FUNDING DUE TO THE CONTINUING RESOLUTION.	\$131,650.00	\$0.00	2015	12/19/2014	15	SS001360014	1	OTHER THAN SMALL BUSINESS
MICROSOFT CORPORATION SITZ IN REDMOND CORPORATION	IGF::OT::IGF MOD 01 TO TASK ORDER 15 AGAINST MICROSOFT CONTRACT TO PROVIDE FULL FUNDING DUE TO FY2015 BUDGET PASSAGE.	\$1,053,200.00	\$0.00	2015	1/15/2015	15	SS001360014	2	OTHER THAN SMALL BUSINESS
MICROSOFT CORPORATION SITZ IN REDMOND CORPORATION	IGF::OT::IGF MOD 01 TO TO 16 AGAINST MICROSOFT CONTRACT SS00-13-60014. THE PURPOSE OF THIS MODIFICATION IS TO PROVIDE FULL FUNDING DUE TO FY2015 BUDGET PASSAGE.	\$398,444.85	\$0.00	2015	1/15/2015	16	SS001360014	2	OTHER THAN SMALL BUSINESS
MICROSOFT CORPORATION SITZ IN REDMOND CORPORATION	IGF::OT::IGF MOD 01 TO TO 16 AGAINST MICROSOFT CONTRACT SS00-13-60014. THE PURPOSE OF THIS MODIFICATION IS TO PROVIDE ADDITIONAL FUNDING DUE TO THE CONTINUING RESOLUTION.	\$44,271.65	\$0.00	2015	12/19/2014	16	SS001360014	1	OTHER THAN SMALL BUSINESS
MICROSOFT CORPORATION SITZ IN REDMOND CORPORATION	IGF::OT::IGF MOD 3 TO TASK ORDER 15 AGAINST MICROSOFT CONTRACT TO INCORPORATE CHANGES TO THE STATEMENT OF WORK FOR SUBTASK 3.	\$0.00	\$0.00	2015	4/20/2015	15	SS001360014	3	OTHER THAN SMALL BUSINESS
MICROSOFT CORPORATION SITZ IN REDMOND CORPORATION	IGF::OT::IGF MODIFICATION 1 TO TASK ORDER 19 AGAINST MICROSOFT CONTRACT FOR CONTINUING SUPPORT SERVICES FROM MICROSOFT FOR EXCHANGE SOFTWARE. THIS MODIFICATION IS TO UPDATE THE SOW TO REFLECT CHANGES TO SUBTASKS 1 AND 2.	\$0.00	\$0.00	2016	6/1/2016	19	SS001360014	1	OTHER THAN SMALL BUSINESS
BOWHEAD PROFESSIONAL SOLUTIONS, LLC	IGF::OT::IGF MODIFICATION IS TO REVISE AN INSTALLATION DATE.	\$0.00	\$0.00	2015	2/25/2015	SS001530142	SS001461008	3	SMALL BUSINESS
NATIONAL ASSOCIATION FOR PUBLIC HEALTH STATISTICS AND INFORM	IGF::OT::IGF TECHNICAL ASSISTANCE AND TESTING OF STATE ELECTRONIC DEATH REGISTRATION SYSTEMS (EDRS). MODIFICATION CHANGES THE NAME OF THE ADMINISTRATIVE CONTRACT SPECIALIST.	\$0.00	\$0.00	2015	2/27/2015	SS001360047		3	OTHER THAN SMALL BUSINESS
MICROSOFT CORPORATION SITZ IN REDMOND CORPORATION	IGF::OT::IGF THE PURPOSE OF THIS MODIFICATION IS TO FULLY FUND THE ORDER SINCE THE CONTINUING RESOLUTION HAS BEEN LIFTED. TASK ORDER 23 WAS AGAINST MICROSOFT CONTRACT FOR CONTINUING SUPPORT SERVICES FROM MICROSOFT FOR LYNC SERVER 2013 AND SYSTEM CENTER CONFIGURATION MANAGER 2012 SOFTWARE.	\$743,592.00	\$0.00	2016	1/20/2016	23	SS001360014	1	OTHER THAN SMALL BUSINESS

Vendor Name	Description of Requirement	Action Obligation	Base and All Options Value	Fiscal Year	Date Signed	PO/Delivery Order/Task Order/Call#	Parent Contract	Mod #	Contracting Officers Business Size Selection
BOWHEAD PROFESSIONAL SOLUTIONS, LLC	IGF::OT::IGF  THE SOCIAL SECURITY ADMINISTRATION (SSA) HAS A REQUIREMENT FOR CONTRACTOR SERVICES TO SUPPORT OUR AUTOMATED DATA PROCESSING CAPABILITIES AT CLAIMS-TAKING FOREIGN SERVICE POSTS (FSP) SITES.  JUSTIFICATION: THESE SERVICES ARE REQUIRED TO PROVIDE SUPPORT FOR RELOCATIONS (CURRENT BUILDING LOCATION TO ANOTHER BUILDING LOCATION), INSTALLATIONS AND UPGRADES OF INTELLIGENT WORKSTATIONS (IWS) AND LOCAL AREA NETWORK (LAN) COMPONENTS IN VARIOUS FSP SITES. THE SERVICES PROVIDES FOR THE COMPLETE INSTALLATION OF NEW FSP SITES AND TECHNOLOGY REFRESHMENTS AT EXISTING SITES. THE PROJECT WILL BE MULTI-PHASED IN NATURE AND WILL REQUIRE SITE VISITS, INSTALLATION, TRAINING, SHIPPING, AND PROJECT MANAGEMENT.	\$0.00	\$0.00	2015	1/6/2015	SS001530142	SS001461008	2	SMALL BUSINESS
AMERICAN PSYCHOLOGICAL ASSOCIATION, INC.	IGF::OT::IGF APA AMERICAN PSYCHOLOGICAL ASSOCIATION SUBSCRIPTION RENEWAL-OPTION YEAR 1 FOR THE PERIOD OF PERFORMANCE: 10/01/2015-09/30/2015	\$15,525.00	\$0.00	2015	7/22/2015	SS001451203		1	OTHER THAN SMALL BUSINESS
XCEL PROTECTIVE SERVICES, INC.	IGF::OT::IGF ARMED GUARD SERVICES - SECOND SUPPORT CENTER MOD 00001:  THE PURPOSE OF THIS MODIFICATION IS TO AMEND FUNDING INFORMATION ASSIGNED TO CLINS 0002 AND 0003 TO ALLOW FOR TASK ORDER PLACEMENT.	\$0.00	\$0.00	2016	7/13/2016	SS001660027		1	SMALL BUSINESS
XCEL PROTECTIVE SERVICES, INC.	IGF::OT::IGF ARMED GUARD SERVICES - SECOND SUPPORT CENTER MOD 00002:  THE PURPOSE OF THIS MODIFICATION IS TO ADD THE ELECTRONIC INVOICING AND PAYMENT REQUIREMENTS, INTERNET PAYMENT PLATFORM.	\$0.00	\$0.00	2016	8/9/2016	SS001660027		2	SMALL BUSINESS
EMPLOYMENT RESEARCH CORPORATION	IGF::OT::IGF BILATERAL MODIFICATION TO UPDATE THE SECURITY AND PROTECTION LANGUAGE (BASE AWARD ATTACHMENT #3) TO REMOVE THE OUTDATED APPROVED APPLICATIONS LIST.	\$0.00	\$0.00	2016	7/26/2016	SS001660030		1	SMALL BUSINESS
D R MYERS DISTRIBUTING CO	IGF::OT::IGF DOCUTECTOR DIGITAL LIBRARY RESOURCE TO EXERCISE OPTION YEAR TWO.	\$42,540.00	\$0.00	2015	12/18/2014	SS001350021		2	SMALL BUSINESS
NATIONAL ASSOCIATION FOR PUBLIC HEALTH STATISTICS AND INFORM	IGF::OT::IGF EVVE CONTRACT	\$429,570.32	\$0.00	2015	9/21/2015	SS001260091		4	OTHER THAN SMALL BUSINESS
PITNEY BOWES INC.	IGF::OT::IGF EXERCISE OPTION 1 TO EXTEND TERM OF CONTRACT	\$705,468.00	\$0.00	2016	6/29/2016	SS001560041		1	OTHER THAN SMALL BUSINESS
NATIONAL ASSOCIATION FOR PUBLIC HEALTH STATISTICS AND INFORM	IGF::OT::IGF EXERCISE OPTION 4 OF CONTRACT	\$0.00	\$0.00	2016	6/30/2016	SS001260091		5	OTHER THAN SMALL BUSINESS
MACROECONOMIC ADVISERS LLC	IGF::OT::IGF EXERCISE OPTION YEAR 1	\$18,600.00	\$0.00	2015	6/3/2015	SS001451231		2	SMALL BUSINESS
MOODY'S ANALYTICS, INC.	IGF::OT::IGF EXERCISE OPTION YEAR 1 UNDER SS00-14-51162 FOR MOODY'S ECONOMY.COM SUBSCRIPTION	\$33,466.00	\$0.00	2015	6/3/2015	SS001451163		3	OTHER THAN SMALL BUSINESS
MOODY'S ANALYTICS, INC.	IGF::OT::IGF EXERCISE OPTION YEAR 2 UNDER SS00-14-51162 FOR MOODY'S ECONOMY.COM SUBSCRIPTION	\$35,139.00	\$0.00	2016	5/17/2016	SS001451163		4	OTHER THAN SMALL BUSINESS

Vendor Name	Description of Requirement	Action Obligation	Base and All Options Value	Fiscal Year	Date Signed	PO/Delivery Order/Task Order/Call#	Parent Contract	Mod #	Contracting Officers Business Size Selection
IRON DATA SOLUTIONS, INC. (DE)	IGF::OT::IGF IDIQ CONTRACT SS00-11-60059(IRON DATA SOLUTIONS, INC.)-- TASK ORDER 0070 MOD 001: IRON DATA EXTENDED SUPPORT COVERAGE FOR 47 DDS SITES NATIONWIDE. EXTENDED SUPPORT COVERAGE MAKES IRON DATA TECHNICAL SUPPORT AVAILABLE DURING THE HOURS OF 6:00 A.M. TO 8:00 A.M. EST AND 5:00 P.M. TO 10:00 P.M. EST. MOD 001 OBLIGATES ADDITIONAL FUNDS TO FULLY FUND TASK ORDER 0070 THROUGH THE END OF THE PERIOD OF PERFORMANCE.	\$128,309.00	\$0.00	2015	12/30/2014	70	SS001160059	1	OTHER THAN SMALL BUSINESS
DALLAS LIGHTHOUSE FOR THE BLIND, INC.	IGF::OT::IGF MANAGE AND MAINTAIN THE MAIL ROOM AND SUPPLY ROOM AT SSA REGIONAL OFFICE IN DALLAS, TEXAS.	\$74,541.00	\$0.00	2016	4/20/2016	SS061560003		1	OTHER THAN SMALL BUSINESS
NATIONAL LAW ENFORCEMENT TELECOMMUNICATIONS SYSTEMS INC	IGF::OT::IGF MEMBERSHIP TO NATIONAL LAW ENFORCEMENT TELECOMMUNICATIONS SYSTEM (NLETS) FOR HOMELAND SECURITY PRESIDENTIAL DIRECTIVE-12 IDENTITY VERIFICATION - MODIFICATION TO UPDATE THE CLAUSES IN THE CONTRACT DOCUMENT TO ADD THE SECURITY AND SUITABILITY REQUIREMENT CLAUSE.	\$0.00	\$0.00	2016	3/17/2016	SS001350086		7	OTHER THAN SMALL BUSINESS
EASTMAN KODAK COMPANY	IGF::OT::IGF MOD 1 TO PO FOR MAINTENANCE OF TWO KODAK SOCIAL SECURITY CARD PRINTERS AND RELATED SOFTWARE.	\$0.00	\$0.00	2016	1/5/2016	SS001650047		1	OTHER THAN SMALL BUSINESS
NATIONAL LAW ENFORCEMENT TELECOMMUNICATIONS SYSTEMS INC	IGF::OT::IGF MODIFICATION TO ADD ALTERNATE COTR, TANIKA LEE.	\$0.00	\$0.00	2015	9/28/2015	SS001350086		5	OTHER THAN SMALL BUSINESS
AMERICAN PSYCHOLOGICAL ASSOCIATION, INC.	IGF::OT::IGF MODIFICATION TO CHANGE THE ASSIGNED PURCHASING AGENT.	\$0.00	\$0.00	2016	11/12/2015	SS001451203		2	OTHER THAN SMALL BUSINESS
D R MYERS DISTRIBUTING CO	IGF::OT::IGF MODIFICATION TO CHANGE THE ASSIGNED PURCHASING AGENT.	\$0.00	\$0.00	2016	11/9/2015	SS001350021		3	SMALL BUSINESS
NATIONAL LAW ENFORCEMENT TELECOMMUNICATIONS SYSTEMS INC	IGF::OT::IGF MODIFICATION TO CHANGE THE DESIGNATION OF THE PURCHASING AGENT.	\$0.00	\$0.00	2016	11/9/2015	SS001350086		6	OTHER THAN SMALL BUSINESS
EBIX, INC.	IGF::OT::IGF MODIFICATION TO EXERCISE OPTION YEAR 1 UNDER PURCHASE ORDER SS00-14-51153 AND OBLIGATE FUNDING FOR HEALTH ILLUSTRATED ENCYCLOPEDIA SUBSCRIPTION.	\$46,000.00	\$0.00	2015	5/27/2015	SS001451153		2	OTHER THAN SMALL BUSINESS
EBIX, INC.	IGF::OT::IGF MODIFICATION TO EXERCISE OPTION YEAR 1 UNDER PURCHASE ORDER SS00-14-51153 AND OBLIGATE FUNDING FOR HEALTH ILLUSTRATED ENCYCLOPEDIA SUBSCRIPTION.	\$46,000.00	\$0.00	2016	4/21/2016	SS001451153		3	OTHER THAN SMALL BUSINESS
AMERICAN PSYCHOLOGICAL ASSOCIATION, INC.	IGF::OT::IGF MODIFICATION TO EXERCISE OPTION YEAR 2.	\$16,146.00	\$0.00	2016	4/21/2016	SS001451203		3	OTHER THAN SMALL BUSINESS
HEALTHEWAY, INC.	IGF::OT::IGF MODIFICATION TO EXERCISE OPTION YEAR FOR THE EHEALTH EXCHANGE	\$118,000.00	\$0.00	2015	3/20/2015	SS001360012		3	OTHER THAN SMALL BUSINESS
MACROECONOMIC ADVISERS LLC	IGF::OT::IGF MODIFICATION TO EXERCISE OPTION YEAR II OF THE EXECUTIVE FORECAST SERVICE SUBSCRIPTION	\$19,350.00	\$0.00	2016	5/4/2016	SS001451231		3	SMALL BUSINESS
HEALTHEWAY, INC.	IGF::OT::IGF MODIFICATION TO EXERCISE OPTION YEAR THREE FOR THE EHEALTH EXCHANGE	\$63,000.00	\$0.00	2016	3/25/2016	SS001360012		4	OTHER THAN SMALL BUSINESS
NATIONAL LAW ENFORCEMENT TELECOMMUNICATIONS SYSTEMS INC	IGF::OT::IGF MODIFICATION TO EXERCISE OPTION YEAR THREE FROM MAY 1, 2015 THROUGH APRIL 30, 2016.	\$48,000.00	\$0.00	2015	3/2/2015	SS001350086		4	OTHER THAN SMALL BUSINESS
NATIONAL LAW ENFORCEMENT TELECOMMUNICATIONS SYSTEMS INC	IGF::OT::IGF MODIFICATION TO EXERCISE OPTION YEAR THREE FROM MAY 1, 2016 THROUGH APRIL 30, 2017.	\$48,000.00	\$0.00	2016	3/24/2016	SS001350086		8	OTHER THAN SMALL BUSINESS
COMMFED SOLUTIONS, INC	IGF::OT::IGF NOTICE TO PROCEED  REMOVAL OF THE YORK ABSORPTION CHILLER UNIT FROM THE NCC UTILITY BUILDING	\$0.00	\$0.00	2015	2/10/2015	SS001461119		1	SMALL BUSINESS

Vendor Name	Description of Requirement	Action Obligation	Base and All Options Value	Fiscal Year	Date Signed	PO/Delivery Order/Task Order/Call#	Parent Contract	Mod #	Contracting Officers Business Size Selection
NATIONAL ACADEMY OF SCIENCES	IGF::OT::IGF TASK ORDER 0007 IS A COST REIMBURSEMENT TASK ORDER FOR THE NATIONAL ACADEMY OF SCIENCES TO FORM A CONSENSUS COMMITTEE TO PROVIDE FINDINGS AND CONCLUSIONS ON IMPROVING HEALTH OUTCOMES FOR CHILDREN WITH DISABILITIES. THIS IS A MODIFICATION TO CORRECT THE DELIVERABLE DUE DATE.	\$0.00	\$0.00	2016	6/15/2016	7	SS001360048	1	OTHER THAN SMALL BUSINESS
NATIONAL ASSOCIATION FOR PUBLIC HEALTH STATISTICS AND INFORM	IGF::OT::IGF TESTING AND TECHNICAL ASSISTANCE FOR STATES IMPLEMENTING ELECTRONIC DEATH REGISTRATION SYSTEMS. THE PURPOSE OF THIS MODIFICATION IS TO CHANGE THE CONTRACTING OFFICER TECHNICAL REPRESENTATIVE (COTR), AND ALTERNATE COTR.	\$0.00	\$0.00	2016	8/10/2016	SS001660002		1	OTHER THAN SMALL BUSINESS
NATIONAL ASSOCIATION FOR PUBLIC HEALTH STATISTICS AND INFORM	IGF::OT::IGF TESTING AND TECHNICAL ASSISTANCE FOR STATES IMPLEMENTING ELECTRONIC DEATH REGISTRATION SYSTEMS. THE PURPOSE OF THIS MODIFICATION IS TO EXERCISE OPTION YEAR ONE (CONTRACT YEAR 2) BEGINNING OCTOBER 26, 2016 THROUGH OCTOBER 25, 2017.	\$0.00	\$0.00	2017	10/24/2016	SS001660002		2	OTHER THAN SMALL BUSINESS
OUTTZ, JAMES & ASSOCIATES	IGF::OT::IGF THE PURPOSE OF THIS ADMINISTRATIVE MODIFICATION IS TO CHANGE THE CONTRACTING OFFICER'S CONTACT INFORMATION LISTED IN THE CONTRACT.	\$0.00	\$0.00	2016	12/23/2015	SS001560037		2	SMALL BUSINESS
CAMPION SERVICES INC	IGF::OT::IGF THE PURPOSE OF THIS MODIFICATION IS TO UPDATE AS CLAUSE 2352.232-1 IN ACCORDANCE WITH HANDBOOK TRANSMITTAL 16-13.	\$0.00	\$0.00	2017	11/18/2016	SS001650106		1	SMALL BUSINESS
CRA INTERNATIONAL, INC.	IGF::OT::IGF THE PURPOSE OF THIS MODIFICATION IS TO UPDATE AS CLAUSE 2352.232-1 IN ACCORDANCE WITH HANDBOOK TRANSMITTAL 16-13.	\$0.00	\$0.00	2017	11/17/2016	SS001560036		8	OTHER THAN SMALL BUSINESS
SHUTTERSTOCK, INC.	IGF::OT::IGF THIS IS A VIDEO DOWNLOAD SOFTWARE THAT WILL HELP MEET THE ACTING COMMISSIONERS GOAL TO GET MORE COMMUNICATION TO EMPLOYEES. WE USE THIS SOFTWARE FOR INTERNAL AND EXTERNAL VIDEOS	\$0.00	\$0.00	2016	12/7/2015	SS001550288		1	OTHER THAN SMALL BUSINESS
EMPLOYMENT RESEARCH CORPORATION	IGF::OT::IGF UNILATERAL MODIFICATION TO UPDATE AS CLAUSE 2352.232-1 IN ACCORDANCE WITH HANDBOOK TRANSMITTAL 16-13.	\$0.00	\$0.00	2017	11/7/2016	SS001660030		2	SMALL BUSINESS
THOMSON REUTERS (PROFESSIONAL) UK LTD	IGF::OT::IGF WECOMPLY TRAINING SUBSCRIPTION CONTAINING A FULL ETHICS AND COMPLIANCE LIBRARY.	\$0.00	\$0.00	2016	12/22/2015	SS001550232		1	OTHER THAN SMALL BUSINESS
IMAGING SOLUTIONS, INC	IGF::OT::IGF: MODIFICATION TO CHANGE FORM OF PAYMENT FROM ELECTRONIC FUND TRANSFER TO GOVERNMENT PURCHASE CARD (CREDIT CARD).	\$0.00	\$0.00	2015	7/15/2015	SS001451255		1	SMALL BUSINESS
WORKFORCE DEVELOPMENT, IOWA	IOWA WORKFORCE DEVELOPMENT (IWD) - EXERCISE OPTION YEAR FOUR  N/A PRIOR 03/01/2012	\$7,200.00	\$0.00	2015	5/6/2015	SS071150008		4	OTHER THAN SMALL BUSINESS
COMPUTER MANAGEMENT SCIENCES INC	MAINTAIN COMPUTER MANAGEMENT SCIENCES CPEXPRT SOFTWARE	\$0.00	\$0.00	2016	6/2/2016	SS001651006		2	OTHER THAN SMALL BUSINESS
COMPUTER MANAGEMENT SCIENCES INC	MAINTAIN COMPUTER MANAGEMENT SCIENCES CPEXPRT SOFTWARE	\$0.00	\$0.00	2016	6/14/2016	SS001651006		3	OTHER THAN SMALL BUSINESS
COMPUTER MANAGEMENT SCIENCES INC	MAINTAIN COMPUTER MANAGEMENT SCIENCES CPEXPRT SOFTWARE	\$23,333.34	\$0.00	2017	10/14/2016	SS001651006		4	OTHER THAN SMALL BUSINESS
OPEX CORPORATION	MAINTENANCE CONTRACT FOR OPEX MODEL PS51/OMATION 306 LETTER OPENER  IGF::OT::IGF OTHER FUNCTIONS	\$8,265.56	\$0.00	2015	8/4/2015	SS031450006		3	OTHER THAN SMALL BUSINESS
PHOENIX SOFTWARE INTERNATIONAL, INC.	MAINTENANCE ON PHOENIX SOFTWARE PRODUCTS; (E)JENS, FALCON, NEATEST AND LIFEWORKS.	\$0.00	\$0.00	2015	5/11/2015	SS001560023		1	OTHER THAN SMALL BUSINESS

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ROCKET SOFTWARE, INC.	MAINTENANCE ON ROCKET DASD SOFTWARE AND ROCKET ALDON SOFTWARE	\$0.00	\$0.00	2015	4/29/2015	SS001550025		2	OTHER THAN SMALL BUSINESS
HELP/SYSTEMS, LLC	MAINTENANCE RENEWAL- ISERIES AUDIT AND VULNERABILITY ASSESSMENT TOOL (COMPLIANCE MONITOR)	\$0.00	\$0.00	2016	12/7/2015	SS001550015		2	OTHER THAN SMALL BUSINESS
PECO ENERGY COMPANY	MATSSC/UTILITIES (ELECTRIC/WATER/GAS)								
	IGF::OT::IGF OTHER FUNCTIONS	\$0.00	\$0.00	2015	1/6/2015	SS031431005	GS00P06BSD0447	1	OTHER THAN SMALL BUSINESS
PHILADELPHIA, CITY OF- WATER DEPARTMENT	MATSSC/UTILITIES (ELECTRIC/WATER/GAS)								
	IGF::OT::IGF OTHER FUNCTIONS	\$0.00	\$0.00	2015	1/8/2015	SS031451012		1	OTHER THAN SMALL BUSINESS
PHILADELPHIA, CITY OF	MATSSC/UTILITIES (ELECTRIC/WATER/GAS)								
	IGF::OT::IGF OTHER FUNCTIONS	\$0.00	\$0.00	2015	1/8/2015	SS031431003	GS00P08BSD0546	1	OTHER THAN SMALL BUSINESS
PHILADELPHIA, CITY OF	MATSSC/UTILITIES (ELECTRIC/WATER/GAS)								
	IGF::OT::IGF OTHER FUNCTIONS	\$0.00	\$0.00	2015	5/19/2015	SS031431003	GS00P08BSD0546	2	OTHER THAN SMALL BUSINESS
ALLIED HEALTH CARE SERVICES	MOD 28 CLEANING REQUIREMENTS HOURS FOR FITNESS ROOM.	\$0.00	\$0.00	2015	12/1/2014	SS000860128		28	OTHER THAN SMALL BUSINESS
ALLIED HEALTH CARE SERVICES	MOD 29 ADMIN MOD TO ADD REQUISITION TO MOD 000027.	\$0.00	\$0.00	2015	3/4/2015	SS000860128		29	OTHER THAN SMALL BUSINESS
ALLIED HEALTH CARE SERVICES	MOD 33 EXERCISE FOLLOW-ON YEAR VIII.	\$2,111,081.64	\$0.00	2016	6/30/2016	SS000860128		33	OTHER THAN SMALL BUSINESS
FUTRON INC	MOD TO CHANGE POP	\$0.00	\$0.00	2016	12/16/2015	SS001530904	GS35F5400H	1	SMALL BUSINESS
FUTRON INC	MOD TO CHANGE SOW	\$0.00	\$0.00	2016	2/23/2016	SS001530904	GS35F5400H	2	SMALL BUSINESS
TCG PROPERTY CORPORATION	MODIFICATION 1 TO CONTRACT SS00-15-60056 FOR MECHANICAL MAINTENANCE, CUSTODIAL, AND TRASH SORTING SERVICES AT THE SOCIAL SECURITY ADMINISTRATION SECURITY WEST BUILDING IN BALTIMORE, MD. THE PURPOSE OF THIS MODIFICATION IS TO FULLY FUND LINE ITEMS 0002 AND 0003.								
	SERVICE CONTRACT FUNCTION TYPE = IGF::CT::IGF	\$129,755.28	\$0.00	2017	11/3/2016	SS001660039		1	SMALL BUSINESS
COMPUWARE CORPORATION	MODIFICATION IS TO EXERCISE OPTION YEAR 4 FROM 09/30/2015 - 09/29/2016.	\$11,400,000.00	\$0.00	2015	8/17/2015	SS001160060		6	OTHER THAN SMALL BUSINESS
COMPUWARE CORPORATION	MODIFICATION IS TO EXERCISE OPTION YEAR 5 FROM 09/30/2016 - 09/29/2017.	\$11,400,000.00	\$0.00	2016	7/26/2016	SS001160060		8	OTHER THAN SMALL BUSINESS
COMPUWARE CORPORATION	MODIFICATION TO CHANGE COTR	\$0.00	\$0.00	2015	3/4/2015	SS001160060		5	OTHER THAN SMALL BUSINESS
LOOK SOFTWARE PTY. LTD.	MODIFICATION TO CHANGE COTR	\$0.00	\$0.00	2015	6/1/2015	SS001560033		1	OTHER THAN SMALL BUSINESS
ASSOCIATION FOR COMPUTING MACHINERY, INC.	MODIFICATION TO CHANGE THE ASSIGNED PURCHASING AGENT.	\$0.00	\$0.00	2016	11/12/2015	SS001350132		3	OTHER THAN SMALL BUSINESS
BMJ PUBLISHING GROUP LTD	MODIFICATION TO CHANGE THE ASSIGNED PURCHASING AGENT.	\$0.00	\$0.00	2016	11/16/2015	SS001451140		3	OTHER THAN SMALL BUSINESS
CONQUEST SYSTEMS, INC.	MODIFICATION TO CHANGE THE ASSIGNED PURCHASING AGENT.	\$0.00	\$0.00	2016	11/20/2015	SS001550088		1	SMALL BUSINESS
ELSEVIER INC.	MODIFICATION TO CHANGE THE ASSIGNED PURCHASING AGENT.	\$0.00	\$0.00	2016	11/16/2015	SS001451194		2	OTHER THAN SMALL BUSINESS
PDR EQUITY, LLC	MODIFICATION TO CHANGE THE ASSIGNED PURCHASING AGENT.	\$0.00	\$0.00	2015	12/1/2014	SS001451202		1	SMALL BUSINESS
ROUBINI GLOBAL ECONOMICS, LLC	MODIFICATION TO CHANGE THE ASSIGNED PURCHASING AGENT.	\$0.00	\$0.00	2015	12/1/2014	SS001451193		1	OTHER THAN SMALL BUSINESS
NATIONAL ACADEMY OF SCIENCES	MODIFICATION TO CLARIFY LANGUAGE - TASK ORDER 0002 TO EVALUATE THE SUPPLEMENTAL SECURITY INCOME (SSI) DISABILITY PROGRAM FOR CHILDREN WITH MENTAL DISORDERS	\$0.00	\$0.00	2015	5/19/2015		2 SS001360048	6	OTHER THAN SMALL BUSINESS
INFOGIX, INC.	MODIFICATION TO EXERCISE OPTION 3 TO THE CONTRACT.	\$405,585.00	\$0.00	2015	5/20/2015	SS001260078		6	SMALL BUSINESS
IMMIXTECHNOLOGY, INC.	MODIFICATION TO EXERCISE OPTION II, RENEWAL OF TIBCO MANAGED FILE SOFTWARE MAINTENANCE (PREVIOUSLY CYBERFUSION)	\$261,880.97	\$0.00	2015	7/15/2015	SS001360026		3	OTHER THAN SMALL BUSINESS
IMMIXTECHNOLOGY, INC.	MODIFICATION TO EXERCISE OPTION III, RENEWAL OF TIBCO MANAGED FILE SOFTWARE MAINTENANCE (PREVIOUSLY CYBERFUSION)	\$269,737.39	\$0.00	2016	7/14/2016	SS001360026		4	OTHER THAN SMALL BUSINESS
MAZDA COMPUTER CORPORATION	MODIFICATION TO EXERCISE OPTION PERIOD I FOR THE RENEWAL OF EVENTACTION SOFTWARE MAINTENANCE	\$216,000.00	\$0.00	2016	7/28/2016	SS001560044		2	OTHER THAN SMALL BUSINESS
ELSEVIER INC.	MODIFICATION TO EXERCISE OPTION YEAR 1 - ANNUAL SUBSCRIPTION TO AMERICAN BOARD OF MEDICAL SPECIALIST (ABMS).	\$3,969.00	\$0.00	2015	6/29/2015	SS001451194		1	OTHER THAN SMALL BUSINESS



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SKILLTRAN LLC	MODIFICATION TO EXERCISE OPTION YEAR 1 UNDER PURCHASE ORDER SS00-14-51186 AND OBLIGATE FUNDING FOR THE JOB BROWSER PRO SUBSCRIPTION	\$9,834.00	\$0.00	2015	5/27/2015	SS001451186		2	SMALL BUSINESS
ROUBINI GLOBAL ECONOMICS, LLC	MODIFICATION TO EXERCISE OPTION YEAR 1 UNDER PURCHASE ORDER SS00-14-51193 AND OBLIGATE FUNDING FOR THE RGE MONITOR SUBSCRIPTION.	\$15,333.33	\$0.00	2015	5/27/2015	SS001451193		2	OTHER THAN SMALL BUSINESS
PDR EQUITY, LLC ELSEVIER INC.	MODIFICATION TO EXERCISE OPTION YEAR 1-ANNUAL SUBSCRIPTION TO PHYSICIANS DESK REFERENCE (PDR) ELECTRONIC LIBRARY.	\$5,840.00	\$0.00	2015	7/13/2015	SS001451202		2	SMALL BUSINESS
	MODIFICATION TO EXERCISE OPTION YEAR 2	\$4,138.00	\$0.00	2016	6/17/2016	SS001451194		3	OTHER THAN SMALL BUSINESS
ASSOCIATION FOR COMPUTING MACHINERY, INC.	MODIFICATION TO EXERCISE OPTION YEAR 2- ANNUAL SUBSCRIPTION TO ASSOCIATION FOR COMPUTING MACHINERY (ACM) DIGITAL LIBRARY.	\$16,823.92	\$0.00	2015	7/14/2015	SS001350132		2	OTHER THAN SMALL BUSINESS
ROUBINI GLOBAL ECONOMICS, LLC	MODIFICATION TO EXERCISE OPTION YEAR 2 UNDER PURCHASE ORDER SS00-14-51193 AND OBLIGATE FUNDING FOR THE RGE MONITOR SUBSCRIPTION.	\$15,333.33	\$0.00	2016	9/16/2016	SS001451193		3	OTHER THAN SMALL BUSINESS
BMJ PUBLISHING GROUP LTD	MODIFICATION TO EXERCISE OPTION YEAR 2.	\$6,610.00	\$0.00	2016	5/16/2016	SS001451140		4	OTHER THAN SMALL BUSINESS
PDR EQUITY, LLC	MODIFICATION TO EXERCISE OPTION YEAR 2-ANNUAL SUBSCRIPTION TO PHYSICIANS DESK REFERENCE (PDR) ELECTRONIC LIBRARY.	\$6,275.00	\$0.00	2016	4/21/2016	SS001451202		3	SMALL BUSINESS
SKILLTRAN LLC	MODIFICATION TO EXERCISE OPTION YEAR II UNDER PURCHASE ORDER SS00-14-51186 AND OBLIGATE FUNDING FOR THE JOB BROWSER PRO SUBSCRIPTION	\$9,834.00	\$0.00	2016	5/11/2016	SS001451186		3	SMALL BUSINESS
ROUBINI GLOBAL ECONOMICS, LLC	MODIFICATION TO UPDATE THE CONTRACTORS DUNS NUMBER.	\$0.00	\$0.00	2017	11/2/2016	SS001451193		4	OTHER THAN SMALL BUSINESS
MOTION PICTURE LICENSING CORPORATION	MOTION PICTURE LICENSING CORPORATION UMBRELLA COPYRIGHT INFRINGEMENT LICENSE	\$90,250.00	\$0.00	2016	1/27/2016	SS001550068		1	SMALL BUSINESS
NASATKA BARRIER, INCORPORATED	NASATKA VEHICLE CRASH BARRIERS AT THE NCC - MAINTENANCE, INSPECTION AND EMERGENCY REPAIRS ONE-YEAR BASE PERIOD PLUS FOUR ONE-YEAR OPTION PERIODS IGF::CT::IGF	\$0.00	\$0.00	2015	4/24/2015	SS001451234		1	SMALL BUSINESS
NASATKA BARRIER, INCORPORATED	NASATKA VEHICLE CRASH BARRIERS AT THE NCC - MAINTENANCE, INSPECTION AND EMERGENCY REPAIRS ONE-YEAR BASE PERIOD PLUS FOUR ONE-YEAR OPTION PERIODS IGF::CT::IGF	\$23,572.00	\$0.00	2015	7/28/2015	SS001451234		2	SMALL BUSINESS
NASATKA BARRIER, INCORPORATED	NASATKA VEHICLE CRASH BARRIERS AT THE NCC - MAINTENANCE, INSPECTION AND EMERGENCY REPAIRS ONE-YEAR BASE PERIOD PLUS FOUR ONE-YEAR OPTION PERIODS IGF::CT::IGF	\$23,932.00	\$0.00	2016	8/11/2016	SS001451234		3	SMALL BUSINESS
MASSACHUSETTS MEDICAL SOCIETY	NEW ENGLAND JOURNAL OF MEDICINE (NEJM) RENEWAL.  MODIFICATION TO PURCHASE ORDER SS00-15-50034 IS TO CHANGE THE APPROPRIATION CODE FROM FISCAL YEAR 2014 TO A FISCAL YEAR APPROPRIATION 2015 CODE.	\$0.00	\$0.00	2015	3/19/2015	SS001550034		1	OTHER THAN SMALL BUSINESS
NIELSEN COMPANY US LLC, THE	NIELSEN PRIMELOCATION WEB AND DESKTOP SOFTWARE MAINTENANCE RENEWAL - OPTION PERIOD 1. THE PURPOSE OF MODIFICATION NUMBER 000006 IS TO OBLIGATE THE REMAINING BALANCE OF THE CONTRACT AMOUNT FROM JANUARY 1, 2015 THROUGH SEPTEMBER 30, 2015.	\$233,318.25	\$0.00	2015	12/23/2014	SS001461011		6	OTHER THAN SMALL BUSINESS
NIELSEN COMPANY US LLC, THE	NIELSEN PRIMELOCATION WEB AND DESKTOP SOFTWARE MAINTENANCE RENEWAL. THE PURPOSE OF MODIFICATION NUMBER 07 IS TO EXERCISE OPTION PERIOD 2 FOR THE PERIOD OF PERFORMANCE FROM OCTOBER 1, 2015 THROUGH SEPTEMBER 30, 2016.	\$318,174.00	\$0.00	2016	10/1/2015	SS001461011		7	OTHER THAN SMALL BUSINESS
NIELSEN COMPANY US LLC, THE	NIELSEN PRIMELOCATION WEB AND DESKTOP SOFTWARE MAINTENANCE RENEWAL. THE PURPOSE OF MODIFICATION NUMBER 08 IS TO EXERCISE OPTION PERIOD 3 FOR THE PERIOD OF PERFORMANCE FROM OCTOBER 1, 2016 THROUGH SEPTEMBER 30, 2017.	\$325,469.00	\$0.00	2017	10/1/2016	SS001461011		8	OTHER THAN SMALL BUSINESS

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NIELSEN COMPANY (US), LLC, THE	NIELSEN PRIMELOCATION WEB AND DESKTOP SOFTWARE MAINTENANCE RENEWAL. THE PURPOSE OF MODIFICATION NUMBER 09 IS TO CHANGE THE DUNS NUMBER OF THE CONTRACTOR AT THEIR REQUEST.	\$0.00	\$0.00	2017	11/4/2016	SS001461011		9	OTHER THAN SMALL BUSINESS
NATIONAL ACADEMY OF SCIENCES	NO COST EXTENSION - TASK ORDER TO EVALUATE THE SUPPLEMENTAL SECURITY INCOME (SSI) DISABILITY PROGRAM FOR CHILDREN WITH MENTAL DISORDERS IGF::OT::IGF	\$0.00	\$0.00	2015	3/26/2015		2 SS001360048	5	OTHER THAN SMALL BUSINESS
PUBLIC HEALTH, CONNECTICUT DEPARTMENT OF	NON-ELECTRONIC DEATH REGISTRATION - CONNECTICUT THE PURPOSE OF MODIFICATION NUMBER 4 IS TO EXERCISE OPTION YEAR THREE TO EXTEND THE TERM OF THE CONTRACT FROM JANUARY 1, 2015 THROUGH DECEMBER 31, 2015 FOR RECEIPT OF NON-ELECTRONIC DEATH RECORDS.	\$0.00	\$0.00	2015	12/18/2014	SS001260017		4	OTHER THAN SMALL BUSINESS
HEALTH, MISSISSIPPI STATE DEPARTMENT OF	NON-ELECTRONIC DEATH REGISTRATION - MISSISSIPPI THE PURPOSE OF MODIFICATION NUMBER 4 IS TO EXERCISE OPTION YEAR THREE TO EXTEND THE TERM OF THE CONTRACT FROM JANUARY 1, 2015 THROUGH DECEMBER 31, 2015 FOR RECEIPT OF DEATH RECORDS.	\$0.00	\$0.00	2015	12/18/2014	SS001260025		4	OTHER THAN SMALL BUSINESS
CINCOM SYSTEMS, INC.	OPTION YEAR 3 MAINTENANCE ON CINCOM SW CONTRACT SS00-13-60033	\$442,279.00	\$0.00	2016	10/2/2015	SS001360033		6	OTHER THAN SMALL BUSINESS
CINCOM SYSTEMS, INC.	OPTION YEAR 3 MAINTENANCE ON CINCOM SW CONTRACT SS00-13-60033	\$884,558.00	\$0.00	2016	1/21/2016	SS001360033		7	OTHER THAN SMALL BUSINESS
CINCOM SYSTEMS, INC.	OPTION YEAR 4 MAINTENANCE ON CINCOM SW CONTRACT SS00-13-60033	\$339,006.75	\$0.00	2017	10/1/2016	SS001360033		8	OTHER THAN SMALL BUSINESS
PDFTRON SYSTEMS INC	PDFNET LICENSES FOR DCE-FECS	\$0.00	\$0.00	2016	12/21/2015	SS001550263		1	OTHER THAN SMALL BUSINESS
HERMAN MILLER, INC.	PONCE, PR DO #CA272 PRODUCT AND SERVICESFOR RECONFIGURATION FOR SYSTEMS FURNITURE; MODIFICATION TO CORRECT CAN	\$0.00	\$0.00	2016	6/17/2016	SS001630134	SS001260003	1	OTHER THAN SMALL BUSINESS
ADMIRAL ELEVATOR COMPANY, INC.	REMOTE MONITORING OF ELEVATORS AND ESCALATORS AT SSA HEADQUARTERS IGF::OT::IGF	\$0.00	\$0.00	2016	2/26/2016	SS001560066		1	SMALL BUSINESS
COMPOSITION RESEARCH TECHNOLOGIES, INC	RENEWAL OF SS00-12-50195 ON MAINTENANCE OF CR TECHNOLOGIES, INC. SOFTWARE	\$13,940.00	\$0.00	2015	9/3/2015	SS001350249		3	SMALL BUSINESS
COMPOSITION RESEARCH TECHNOLOGIES, INC	RENEWAL OF SS00-12-50195 ON MAINTENANCE OF CR TECHNOLOGIES, INC. SOFTWARE	\$13,940.00	\$0.00	2016	8/31/2016	SS001350249		4	SMALL BUSINESS
NATIONAL DISABILITY RIGHTS NETWORK INC	REP PAYEE REVIEWS - INTERNAL ADMINISTRATIVE MODIFICATION TO CORRECT THE ACCOUNTING LINE.	\$0.00	\$0.00	2016	8/15/2016	SS000960111		30	OTHER THAN SMALL BUSINESS
NATIONAL DISABILITY RIGHTS NETWORK INC	REPRESENTATIVE PAYEE REVIEWS	\$0.00	\$0.00	2016	3/4/2016	SS000960111		27	OTHER THAN SMALL BUSINESS
NATIONAL DISABILITY RIGHTS NETWORK INC	REPRESENTATIVE PAYEE REVIEWS - ADMINISTRATIVE MODIFICATION TO ADD ALTERNATE COTR.	\$0.00	\$0.00	2016	4/4/2016	SS000960111		29	OTHER THAN SMALL BUSINESS
SHI INTERNATIONAL CORP.	SOCIAL SECURITY ADMINISTRATION'S OFFICE OF THE INSPECTOR GENERAL (OIG) IS LOOKING TO RE-ARCHITECT THE SHAREPOINT FARM LAYOUT WHILE UPGRADING TO SHAREPOINT 2013 FROM SHAREPOINT 2007. MOVING CONTENT DIRECTLY FROM SHAREPOINT 2007 TO SHAREPOINT REQUIRES A THIRD PARTY PRODUCT. TO ALLOW FOR CONTENT MIGRATION, OIG SEEKS TO PURCHASE A THIRD PARTY PRODUCT (SHAREGATE MIGRATION TOOL) WHICH PROVIDES CONTENT MIGRATION FEATURES CAPABLE OF MOVING CONTENT FROM OLDER SHAREPOINT VERSION TO NEWER VERSIONS WITHOUT CORRUPTING CONTENT. THE SUBSCRIPTION IS FOR 12 MONTHS FROM THE DATE OF AWARD.	\$0.00	\$0.00	2016	2/10/2016	SS001550182		1	OTHER THAN SMALL BUSINESS
SHI INTERNATIONAL CORP.	SOCIAL SECURITY ADMINISTRATION'S OFFICE OF THE INSPECTOR GENERAL REQUIRES MAINTENANCE RENEWAL OF ITS SYSTRACK SERVER AND DESKTOP MONITORING SOFTWARE LICENSES.	\$0.00	\$0.00	2016	2/10/2016	SS001650055		1	OTHER THAN SMALL BUSINESS
SYNCSORT INCORPORATED	SOFTWARE MAINTENANCE AND LICENSE UPGRADES FOR SYNCSORT AND ZEN SOFTWARE. THE PURPOSE OF MODIFICATION NUMBER 1 IS TO EXERCISE CLIN 0010 FOR MAINTENANCE FOR ZEN GROUP TRACE SOFTWARE LICENSES FOR THE PERIOD OF PERFORMANCE FROM DECEMBER 20, 2015 THROUGH SEPTEMBER 29, 2016.	\$242,185.85	\$0.00	2016	12/17/2015	SS001560062		1	OTHER THAN SMALL BUSINESS

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SYNSORT INCORPORATED	SOFTWARE MAINTENANCE AND LICENSE UPGRADES FOR SYNSORT AND ZEN SOFTWARE. THE PURPOSE OF MODIFICATION NUMBER 2 IS TO EXERCISE OPTION YEAR 1 CLINS 0011 THROUGH 0016 AND 0019 FOR THE PERIOD OF PERFORMANCE FROM SEPTEMBER 30, 2016 TO SEPTEMBER 29, 2017.	\$594,465.21	\$0.00	2016	8/25/2016	SS001560062		2	OTHER THAN SMALL BUSINESS
PITNEY BOWES GLOBAL FINANCIAL SERVICES LLC	SOLE SOURCE MAINTENANCE/METER RENTAL CONTRACT	\$0.00	\$0.00	2015	12/23/2014	SS001360018		3	OTHER THAN SMALL BUSINESS
PITNEY BOWES GLOBAL FINANCIAL SERVICES LLC	SOLE SOURCE MAINTENANCE/METER RENTAL CONTRACT	\$0.00	\$0.00	2015	6/30/2015	SS001360018		4	OTHER THAN SMALL BUSINESS
ROCK CREEK PUBLISHING GROUP	SS00-10-60086- WEBSITE AND MOBILE APPLICATION DESIGN, DEVELOPMENT, AND DEPLOYMENT SERVICES PROVIDED BY ROCK CREEK STRATEGIC MARKETING (RSCM): MODIFICATION 00013 TO EXERCISE OPTION TO EXTEND SERVICES PER FAR 52.217-8	\$0.00	\$0.00	2015	7/22/2015	SS001060086		13	SMALL BUSINESS
IRON DATA SOLUTIONS, INC. (DE)	SS00-11-60059: IDIQ CONTRACT WITH IRON DATA SOLUTIONS FOR SUPPORT OF SSA ELECTRONIC DISABILITY PROCESSING SYSTEM. MODIFICATION TO ACKNOWLEDGE CONTRACTOR CHANGE-OF NAME PER FAR 42.1205.	\$0.00	\$0.00	2016	3/11/2016	SS001160059		12	OTHER THAN SMALL BUSINESS
IRON DATA SOLUTIONS, INC. (DE)	SS00-11-60059: IDIQ CONTRACT WITH IRON DATA SOLUTIONS FOR SUPPORT OF SSA ELECTRONIC DISABILITY PROCESSING SYSTEM. MODIFICATION TO EXERCISE OPTION TO EXTEND TERM OF THE CONTRACT THROUGH SEPTEMBER 29, 2016.	\$0.00	\$0.00	2015	8/7/2015	SS001160059		11	OTHER THAN SMALL BUSINESS
IRON DATA SOLUTIONS, INC. (DE)	SS00-11-60059: IDIQ CONTRACT WITH MICROPACT GLOBAL, INC. TO SUPPORT SSA ELECTRONIC DISABILITY PROCESSING SYSTEM. MODIFICATION 000013 TO EXERCISE OPTION TO EXTEND TERM OF THE CONTRACT THROUGH 09/29/2017.	\$0.00	\$0.00	2016	8/30/2016	SS001160059		13	OTHER THAN SMALL BUSINESS
INTERNATIONAL BUSINESS MACHINES CORPORATION	SS00-16-60010 - MAINFRAME HARDWARE UPGRADE - DEC 2016 HARDWARE - CAPACITY - HW	\$0.00	\$0.00	2017	11/9/2016	SS001730008	SS001660010	1	OTHER THAN SMALL BUSINESS
AHTNA ENGINEERING SERVICES	SSANRC-CLERICAL CONTRACT - CHANGE OF THE ALT-COTR  N/A PRIOR 03/01/2012 - NOT APPLICABLE-BASE AWARD ISSUED PRIOR TO 03/01/2012	\$0.00	\$0.00	2015	3/6/2015	SS000760063		28	SMALL BUSINESS
AHTNA ENGINEERING SERVICES	SSANRC-CLERICAL CONTRACT - CHANGE OF THE COTR  N/A PRIOR 03/01/2012 - NOT APPLICABLE-BASE AWARD ISSUED PRIOR TO 03/01/2012	\$0.00	\$0.00	2015	2/12/2015	SS000760063		27	SMALL BUSINESS
AHTNA ENGINEERING SERVICES	SSANRC-CLERICAL CONTRACT - EXERCISE INCENTIVE OPTION YEAR VIII. AUGUST 1, 2015 TO JULY 31, 2016.  N/A PRIOR 03/01/2012 - NOT APPLICABLE-BASE AWARD ISSUED PRIOR TO 03/01/2012	\$10,769,172.00	\$0.00	2015	7/8/2015	SS000760063		29	SMALL BUSINESS
AHTNA ENGINEERING SERVICES	SSANRC-CLERICAL CONTRACT - INCORPORATE REVISED QUANTITIES - ATTACHMENT # 11 OF THE CONTRACT.  N/A PRIOR 03/01/2012 - NOT APPLICABLE-BASE AWARD ISSUED PRIOR TO 03/01/2012	\$0.00	\$0.00	2016	5/6/2016	SS000760063		31	SMALL BUSINESS
REEMA CONSULTING SERVICES, INC.	SSOS-09-60015 DBOPC - PRINT MAIL FACILITY TASK	\$35,986.39	\$0.00	2015	12/30/2014	SS001160015		15	SMALL BUSINESS
REEMA CONSULTING SERVICES, INC.	SSOS-09-60015 DBOPC - PRINT MAIL FACILITY TASK	\$395,850.29	\$0.00	2015	1/23/2015	SS001160015		16	SMALL BUSINESS
SOUTHERN BUSINESS SYSTEMS, INC.	STANDARD MAINTENANCE FOR LEKTREIERS	\$8,832.92	\$0.00	2015	3/12/2015	SS041150014		5	SMALL BUSINESS
TETON DATA SYSTEMS INC	STATIREF MEDICAL TEXTBOOKS ONLINE - MODIFICATION TO CORRECT THE APPROPRIATION CODE TO FY15.	\$0.00	\$0.00	2015	2/28/2015	SS001050174		14	SMALL BUSINESS
MANAGEMENT SERVICES, FLORIDA DEPARTMENT OF	SUBSCRIPTION - ACCESS FLORIDA CRIMINAL JUSTICE NETWORK (CJNET) SERVICE. IGF::OT::IGF	\$6,906.72	\$0.00	2015	5/21/2015	SS041450005		1	OTHER THAN SMALL BUSINESS
MANAGEMENT SERVICES, FLORIDA DEPARTMENT OF	SUBSCRIPTION - ACCESS FLORIDA CRIMINAL JUSTICE NETWORK (CJNET) SERVICE. IGF::OT::IGF	\$6,906.72	\$0.00	2016	6/8/2016	SS041450005		2	OTHER THAN SMALL BUSINESS
CINCOM SYSTEMS, INC.	SUPPLEMENTAL FUNDING REQUEST - MODIFY LICENSE TERM OF CINCOM SW FROM TIER BASED TO MIPS CEILING - FULLY FUNDING	\$974,156.23	\$0.00	2015	12/24/2014	SS001360033		5	OTHER THAN SMALL BUSINESS
HERMAN MILLER, INC.	SYSTEMS FURNITURE CONTRACT	\$0.00	\$0.00	2015	1/6/2015	SS001260003		26	OTHER THAN SMALL BUSINESS
HERMAN MILLER, INC.	SYSTEMS FURNITURE CONTRACT	\$0.00	\$0.00	2015	2/3/2015	SS001260003		27	OTHER THAN SMALL BUSINESS
HERMAN MILLER, INC.	SYSTEMS FURNITURE CONTRACT	\$0.00	\$0.00	2015	2/3/2015	SS001260003		28	OTHER THAN SMALL BUSINESS
HERMAN MILLER, INC.	SYSTEMS FURNITURE CONTRACT	\$0.00	\$0.00	2015	9/10/2015	SS001260003		33	OTHER THAN SMALL BUSINESS
HERMAN MILLER, INC.	SYSTEMS FURNITURE CONTRACT - EXERCISE OPTION YEAR 4	\$0.00	\$0.00	2016	12/18/2015	SS001260003		34	OTHER THAN SMALL BUSINESS

Vendor Name	Description of Requirement	Action Obligation	Base and All Options Value	Fiscal Year	Date Signed	PO/Delivery Order/Task Order/Call#	Parent Contract	Mod #	Contracting Officers Business Size Selection
HERMAN MILLER, INC.	SYSTEMS FURNITURE CONTRACT - THIS MODIFICATION IS TO CORRECT THE PERIOD OF PERFORMANCE END DATE.	\$0.00	\$0.00	2016	7/27/2016	SS001260003		37	OTHER THAN SMALL BUSINESS
THE ARC OF BALTIMORE INCORPORATED (1428)	THE ARC FOY8	\$0.00	\$0.00	2016	10/29/2015	SS000860012		48	OTHER THAN SMALL BUSINESS
RELIASOURCE, INC.	THE OFFICE OF TELECOMMUNICATIONS SYSTEMS OPERATION REQUESTED FUNDING BE ADDED TO OPTION ONE FOR THE MAINTENANCE OF DELL SERVERS. IGF::OT::IGF	\$0.00	\$0.00	2015	2/2/2015	SS001350271		3	SMALL BUSINESS
OPEX CORPORATION	THE PURPOSE OF THIS BILATERAL MODIFICATION IS TO UPDATE AND INCORPORATE AS FOLLOWS:  1) SECTION B - SUPPLIES/SERVICES/PRICES/COSTS  2) B-1 STATEMENT OF WORK  3) SECTION C - FEDERAL ACQUISITION REGULATIONS (FAR)INCORPORATED BY REFERENCE CONTRACT CLAUSES  4) TO CORRECT THE OMATION 306 LETTER OPENER SERIAL NUMBER FROM ZE1045 TO ZE01045  THIS INFORMATION WAS NOT INCORPORATED ERRANTLY IN THE ORIGINAL AWARD.  ALL OTHER TERMS AND CONDITIONS REMAIN UNCHANGED.  IGF::OT::IGF	\$0.00	\$0.00	2016	8/25/2016	SS031650007		1	SMALL BUSINESS
NEOPOST USA INC.	THE PURPOSE OF THIS CONTRACT IS TO FUND METER RENTALS FOR ALL NEOPOST AND HASLER MAIL METERS CURRENTLY LEASED BY OUR AGENCY. THE AGENCY PAYS THE METER RENTAL EXPENSES INCURRED BY DISABILITY DETERMINATION SERVICES (DDS) OFFICES AND PRINTING CONTRACTORS (RETAINED BY THE AGENCY TO PRINT WORKLOADS) WHO USE NEOPOST USA INC. METERS.	\$7,350.24	\$0.00	2016	12/24/2015	SS001550057		1	OTHER THAN SMALL BUSINESS
CROSSROADS BUILDING SERVICES INCORPORATED	THE PURPOSE OF THIS MODIFICATION IS NECESSARY TO ADD A CLAUSE AND UPDATE A CLAUSE.  N/A PRIOR 03/01/2012	\$0.00	\$0.00	2016	5/10/2016	SS000760045		32	OTHER THAN SMALL BUSINESS
AHTNA ENGINEERING SERVICES	THE PURPOSE OF THIS MODIFICATION IS NECESSARY TO MAKE ADMINISTRATIVE CHANGES TO THE ACCOUNTING INFO ON MOD # 30.  N/A PRIOR 03/01/2012 - NOT APPLICABLE-BASE AWARD ISSUED PRIOR TO 03/01/2012	\$0.00	\$0.00	2016	5/13/2016	SS000760063		32	SMALL BUSINESS
PECO ENERGY COMPANY	THE PURPOSE OF THIS MODIFICATION IS TO CHANGE THE COR DESIGNATION. IGF::OT::IGF	\$0.00	\$0.00	2017	10/19/2016	SS031630009	GS00P16BSD1212	1	OTHER THAN SMALL BUSINESS
PHILADELPHIA, CITY OF	THE PURPOSE OF THIS MODIFICATION IS TO CHANGE THE COR DESIGNATION. IGF::OT::IGF	\$0.00	\$0.00	2017	10/19/2016	SS031630007	GS00P08BSD0546	1	OTHER THAN SMALL BUSINESS
PHILADELPHIA, CITY OF- WATER DEPARTMENT	THE PURPOSE OF THIS MODIFICATION IS TO CHANGE THE COR DESIGNATION. IGF::OT::IGF	\$0.00	\$0.00	2017	10/19/2016	SS031650005		1	OTHER THAN SMALL BUSINESS
TENACITY, INC.	THE PURPOSE OF THIS MODIFICATION IS TO EXERCISE OPTION I OF THE CONTRACT FOR THE CONTINUED MAINTENANCE OF SSA LICENSED TENACITY ACCESSAPHONE AN IP-TTY SOFTWARE.	\$10,000.00	\$0.00	2016	5/23/2016	SS001560035		3	SMALL BUSINESS
I/S MANAGEMENT STRATEGIES LTD	THE PURPOSE OF THIS MODIFICATION IS TO EXERCISE THE OPTIONAL PERIOD OF PERFORMANCE FROM 11/15/2016 - 07/14/2017	\$13,334.00	\$0.00	2017	10/21/2016	SS001650022		2	OTHER THAN SMALL BUSINESS
PITNEY BOWES INC.	THE PURPOSE OF THIS MODIFICATION IS TO UPDATE THE PERIOD OF PERFORMANCE ON CLINS FOUR AND FIVE.	\$0.00	\$0.00	2017	11/17/2016	SS001560060		1	OTHER THAN SMALL BUSINESS
DLT SOLUTIONS INCORPORATED	THE PURPOSES OF MODIFICATION NUMBER 000004 ARE TO UPDATE DESIGNATION OF CONTRACTING OFFICER'S REPRESENTATIVE (COR) CLAUSE TO OCTOBER 2015 VERSION, INCORPORATE 2352.252-3 DESIGNATION OF CONTRACTING OFFICER'S REPRESENTATIVE-TASK MANAGER (COR-TM) CLAUSE, AND DESIGNATE DAN FRANTZ AS COR-TM FOR CLINS 0072 THROUGH 0087.	\$0.00	\$0.00	2016	7/13/2016	SS001530527	W91QUZ06A0004	4	SMALL BUSINESS

Vendor Name	Description of Requirement	Action Obligation	Base and All Options Value	Fiscal Year	Date Signed	PO/Delivery Order/Task Order/Call#	Parent Contract	Mod #	Contracting Officers Business Size Selection
INNOVATION DATA PROCESSING, INC.	THIS ADMINISTRATIVE MODIFICATION IS BEING ISSUED TO CORRECT FUNDING PER THE COTR PROJECT IDENTIFICATION R997997A0.	\$0.00	\$0.00	2015	5/13/2015	SS001550008		5	OTHER THAN SMALL BUSINESS
ACCUSOFT CORPORATION	THIS ADMINISTRATIVE MODIFICATION IS BEING ISSUED TO CHANGE COTRS	\$0.00	\$0.00	2016	2/9/2016	SS001550159		1	SMALL BUSINESS
COMPUWARE CORPORATION	THIS BILATERAL MODIFICATION 7 IS BEING ISSUED TO UPDATE THE DELIVERABLES AND SERVICES IN THE ATTACHED UPDATED PRODUCT LIST.	\$0.00	\$0.00	2016	5/10/2016	SS001160060		7	OTHER THAN SMALL BUSINESS
WOLTERS KLUWER FINANCIAL SERVICES, INC.	THIS BILATERAL MODIFICATION IS BEING ISSUED TO INCLUDE THE FOLLOWING LANGUAGE - SSA WILL ONLY RECEIVE A LEASE TO CONTINUE SOFTWARE LICENSES AND MAINTENANCE, AND WILL NOT OBTAIN TITLE TO OR OWNERSHIP OF THE SOFTWARE FROM THE CONTRACTOR. THIS SHALL TAKE PRECEDENCE OVER ANY CONFLICTING TERM IN THE CONTRACT.	\$0.00	\$0.00	2015	3/20/2015	SS001550090		1	OTHER THAN SMALL BUSINESS
CONCISE INC.	THIS CONTRACT IS TO PERFORM VERTICAL AND HORIZONTAL CABLE INFRASTRUCTURE SUPPORT AN MAINTENANCE TO ALL EXISTING AND NEW CABLE INFRASTRUCTURE AT THE SECOND SUPPORT CENTER,AND OUTLYING BUILDINGS IN DURHAM NC. FPDS FUNCTION: IGF::CL::IGF	\$262,634.04	\$0.00	2015	7/28/2015	SS001461110		1	SMALL BUSINESS
CONCISE INC.	THIS CONTRACT IS TO PERFORM VERTICAL AND HORIZONTAL CABLE INFRASTRUCTURE SUPPORT AN MAINTENANCE TO ALL EXISTING AND NEW CABLE INFRASTRUCTURE AT THE SECOND SUPPORT CENTER,AND OUTLYING BUILDINGS IN DURHAM NC. FPDS FUNCTION: IGF::CL::IGF	\$267,886.68	\$0.00	2016	8/24/2016	SS001461110		2	SMALL BUSINESS
PERFORMANCE ASSOCIATES, INC.	TO EXERCISE OPTION I CLIN 002 UNDER CONTRACT SS00 16 60001 FOR THE TERM OCTOBER 01 2016 TO SEPTEMBER 30 2017 FOR PERFORMANCE ASSOCIATES PAI O DRIVER FOR Z OS AND TAPE MAINTENANCE RENEWAL.	\$60,000.00	\$0.00	2017	10/1/2016	SS001660001		1	SMALL BUSINESS
TENACITY, INC.	TO INCORPORATE FAR CLAUSE 52.217-9, FAR 52.217-9 OPTION TO EXTEND THE TERM OF THE CONTRACT.	\$0.00	\$0.00	2016	5/19/2016	SS001560035		2	SMALL BUSINESS
CARASOFT TECHNOLOGY CORP.	TO PURCHASE 3 MONTHS OF MAINTENANCE FOR HP EDISCOVERY SOFTWARE IN ORDER TO CO-TERMINATE WITH THE MAJORITY OF THE HP SOFTWARE MAINTENANCE PURCHASED WITH BPA SS00-11-40003, WHICH HAS EXPIRED	\$0.00	\$0.00	2016	6/24/2016	SS001650164		1	OTHER THAN SMALL BUSINESS
MAZDA COMPUTER CORPORATION	UNILATERAL MODIFICATION TO CHANGE COTR	\$0.00	\$0.00	2016	6/10/2016	SS001560044		1	OTHER THAN SMALL BUSINESS
KONIAG SERVICES INC	SOSS BASE YEAR (SERVICES)	(\$0.18)	(\$0.18)	2016	12/9/2015		1 SS000960009	5	SMALL BUSINESS
KONIAG SERVICES INC	IGF::CT::IGF CRITICAL FUNCTIONS	(\$6.84)	(\$6.84)	2016	12/9/2015		50 SS000960009	1	SMALL BUSINESS
HERMAN MILLER, INC.	HENDERSON, KY #XB20 DESIGN, INSTALLATION AND PRODUCT FOR SYSTEMS FURNITURE	(\$11.49)	(\$11.49)	2015	2/12/2015	SS001431979	SS001260003	1	OTHER THAN SMALL BUSINESS
KONIAG SERVICES INC	IGF::CT::IGF CRITICAL FUNCTIONS  TASK ORDER 52 AGAINST SS00-09-60009 WITH KONIAG (KSI) OFFICE OF DISABILITY REVIEW (ODAR) OPERATIONAL SUPPORT.	(\$15.02)	(\$15.02)	2016	12/9/2015		52 SS000960009	1	SMALL BUSINESS
KONIAG SERVICES INC	IGF::CT::IGF CRITICAL FUNCTIONS  TASK ORDER 51 AGAINST SS00-09-60009 WITH KONIAG (KSI) OFFICE OF DISABILITY REVIEW (ODAR) OPERATIONAL SUPPORT.	(\$20.43)	(\$20.43)	2016	12/9/2015		51 SS000960009	1	SMALL BUSINESS
GEORGE K GANAWAY, MD, PC	IGF::OT::IGF NON-INDEPENDENT CASE REVIEWS HOURS	(\$39.18)	(\$39.18)	2015	9/28/2015		9 SS041140071	2	SMALL BUSINESS
HERMAN MILLER, INC.	VENICE, FL XA14 DESIGN, INSTALLATION AND PRODUCT FOR SYSTEMS FURNITURE; MODIFICATION TO DECREASE PRODUCT.	(\$90.65)	(\$90.65)	2016	6/6/2016	SS001630137	SS001260003	1	OTHER THAN SMALL BUSINESS
CRA INTERNATIONAL, INC.	IGF::OT::IGF  BILATERAL MODIFICATION FOR THE FOLLOWING ACTIONS:  1) REVISE OPTION PERIOD I; 2) EXERCISE OPTION PERIOD I, IN ACCORDANCE WITH FAR 52.217-9, WITH A PERIOD OF PERFORMANCE OF 06/04/2016 THROUGH 06/03/2017; AND 3) REVISE SECTIONS C-13 AND C-17 TO READ AS SHOWN.	\$78,565.00	(\$133.00)	2016	5/20/2016	SS001560036		7	OTHER THAN SMALL BUSINESS

Vendor Name	Description of Requirement	Action Obligation	Base and All Options Value	Fiscal Year	Date Signed	PO/Delivery Order/Task Order/Call#	Parent Contract	Mod #	Contracting Officers Business Size Selection
KONIAG SERVICES INC	IGF::CT::IGF CRITICAL FUNCTIONS  TASK ORDER 54 AGAINST SS00-09-60009 WITH KONIAG (KSI) FOR NATIONAL SERVICE CENTER (NSC) SUPPORT TASKS		(\$170.30)	2016	12/9/2015	54	SS000960009	1	SMALL BUSINESS
OPEX CORPORATION	MAINTENANCE CONTRACT FOR OPEX MODEL P551/OMATION 306 LETTER OPENER  IGF::OT::IGF OTHER FUNCTIONS	\$0.00	(\$236.88)	2015	12/23/2014	SS031450006		2	OTHER THAN SMALL BUSINESS
HERMAN MILLER, INC.	PUEBLO, CO C883 - DESIGN, PRODUCT, AND INSTALLATION TO RECONFIGURE AN X3 WORKSTATION TO A MA WORKSTATION FOR SYSTEMS FURNITURE.	(\$252.09)	(\$252.09)	2015	8/20/2015	SS001530354	SS001260003	1	OTHER THAN SMALL BUSINESS
KONIAG SERVICES INC	CONTRACTOR SUPPORT FOR THE WINDOWS 7 CONVERSION IN SUPPORT OF DIVISION OF INTEGRATION AND ENVIRONMENTAL TESTING (DIET)-TEMPORARY POSITION (ONE YEAR).	(\$319.60)	(\$319.60)	2016	10/7/2015	25	SS000960009	1	SMALL BUSINESS
HERMAN MILLER, INC.	IE29 WEST SACRAMENTO, CA - SYSTEMS FURNITURE - TO RECONFIGURE (2) X-3 WORKSTATIONS TO (2) MA-95 WORKSTATIONS.	(\$322.35)	(\$322.35)	2015	8/20/2015	SS001530158	SS001260003	1	OTHER THAN SMALL BUSINESS
HERMAN MILLER, INC.	GREENVILLE, SC CX48 - DESIGN, PRODUCT AND INSTALLATION FOR SYSTEMS FURNITURE	(\$392.16)	(\$392.16)	2015	6/29/2015	SS001530287	SS001260003	1	OTHER THAN SMALL BUSINESS
UNITED STATES POSTAL SERVICE	THE PURPOSE OF THIS MODIFICATION IS CHANGE THE METHOD OF PAYMENT FROM PURCHASE CARD TO INVOICE AND TO REDUCE THE AWARD AMOUNT BY \$468.00 FROM \$11,988.00 \$11,520.00. REDUCTION IS BASED ON PRICE REDUCTION FROM POST OFFICE. IGF::CL::IGF	(\$468.00)	(\$468.00)	2016	4/25/2016	SS031650002		1	OTHER THAN SMALL BUSINESS
HERMAN MILLER, INC.	MURFREESBORO, TN XA578 DESIGN, INSTALLATION AND PRODUCT OF SYSTEMS FURNITURE	(\$511.00)	(\$511.00)	2015	12/15/2014	SS001431484	SS001260003	1	OTHER THAN SMALL BUSINESS
KONIAG SERVICES INC	CONTRACT CLOSEOUT IGF::OT::IGF	(\$512.07)	(\$512.07)	2016	12/2/2015	40	SS000960009	1	SMALL BUSINESS
HERMAN MILLER, INC.	CONWAY, SC X592 DESIGN, INSTALLATION AND PRODUCT FOR SYSTEMS FURNITURE - MOD TO DECREASE PRODUCT.	(\$518.07)	(\$518.07)	2016	1/11/2016	SS001530549	SS001260003	1	OTHER THAN SMALL BUSINESS
HERMAN MILLER, INC.	PONCE, PR #X272 DESIGN, INSTALLATION AND PRODUCT FOR SYSTEMS FURNITURE	(\$534.82)	(\$534.82)	2015	1/27/2015	SS001431659	SS001260003	1	OTHER THAN SMALL BUSINESS
HERMAN MILLER, INC.	LENEXA, KS DO #I779 - SYSTEMS FURNITURE; MODIFICATION TO DECREASE DESIGN HOURS.	(\$546.00)	(\$546.00)	2016	1/12/2016	SS001530650	SS001260003	1	OTHER THAN SMALL BUSINESS
HERMAN MILLER, INC.	FORT SMITH AR DO #Y756 MODIFICATION TO DECREASE THE COST OF PRODUCT FOR SYSTEMS FURNITURE.	(\$580.21)	(\$580.21)	2016	1/11/2016	SS001530420	SS001260003	1	OTHER THAN SMALL BUSINESS
KONIAG SERVICES INC	IGF::CT::IGF CRITICAL FUNCTIONS	(\$659.84)	(\$659.84)	2016	12/9/2015	44	SS000960009	3	SMALL BUSINESS
HERMAN MILLER, INC.	NAPLES, FL YC18, DESIGN, INSTALL AND PRODUCT FOR SYSTEMS FURNITURE	(\$660.61)	(\$660.61)	2016	3/1/2016	SS001530886	SS001260003	1	OTHER THAN SMALL BUSINESS
SABREE, INC.	IGF::OT::IGF CAGE CODE: 4KUQ1  EXERCISE OPTION YEAR II.  ASBESTOS RENOVATION AND REMOVAL SERVICES AT THE SOCIAL SECURITY ADMINISTRATION'S HEADQUARTERS BUILDINGS AND OUTLYING BUILDINGS LOCATED IN BALTIMORE, MD	\$0.00	(\$782.40)	2016	7/23/2016	SS001461113		4	SMALL BUSINESS
HERMAN MILLER, INC.	PHILADELPHIA,(GERMANTOWN),PA #G218 - DESIGN, INSTALLATION, AND PRODUCT FOR SYSTEMS FURNITURE	(\$813.00)	(\$813.00)	2015	9/10/2015	SS001530736	SS001260003	1	OTHER THAN SMALL BUSINESS
HERMAN MILLER, INC.	STATESVILLE, NC DO #E341 MODIFICATION TO CHANGE TOTAL AMOUNT OF INSTALLATION.	(\$902.00)	(\$902.00)	2016	1/8/2016	SS001530157	SS001260003	1	OTHER THAN SMALL BUSINESS
MORNINGSTAR MAIN HICKORY	IGF::OT::IGF TEMPORARY STORAGE UNITS FOR SSA HICKORY, NC	(\$1,001.00)	(\$1,001.00)	2016	6/1/2016	SS041550015		2	SMALL BUSINESS
PITNEY BOWES GLOBAL FINANCIAL SERVICES LLC	SS00-13-60018 MAINTENANCE SERVICE AND METER RENTAL (OPTION YEAR 2)	(\$1,206.00)	(\$1,206.00)	2016	12/10/2015	SS001530672	SS001360018	1	OTHER THAN SMALL BUSINESS
HERMAN MILLER, INC.	DESIGN AND INSTALLATION SERVICES FOR BROOKLYN, NY #X160 (BEDFORD HEIGHTS) FOR SYSTEMS FURNITURE.	(\$1,289.62)	(\$1,289.62)	2015	12/15/2014	SS001331114	SS001260003	1	OTHER THAN SMALL BUSINESS
HERMAN MILLER, INC.	THOUSAND OAKS, CA AA09 - DESIGN, INSTALLATION AND PRODUCT FOR SYSTEMS FURNITURE.	(\$1,299.26)	(\$1,299.26)	2015	5/29/2015	SS001431686	SS001260003	2	OTHER THAN SMALL BUSINESS
HERMAN MILLER, INC.	SACO, ME #AA24 - ADD ON MA-95 WORKSTATION - SYSTEMS FURNITURE	(\$1,432.14)	(\$1,432.14)	2015	7/8/2015	SS001530195	SS001260003	1	OTHER THAN SMALL BUSINESS

Vendor Name	Description of Requirement	Action Obligation	Base and All Options Value	Fiscal Year	Date Signed	PO/Delivery Order/Task Order/Call#	Parent Contract	Mod #	Contracting Officers Business Size Selection
HERMAN MILLER, INC.	SUMTER, SC A595 DESIGN, PRODUCT AND INSTALLATION FOR SYSTEMS FURNITURE	(\$1,435.02)	(\$1,435.02)	2016	8/19/2016	SS001630289	SS001260003	1	OTHER THAN SMALL BUSINESS
HERMAN MILLER, INC.	ASTORIA, OR ID52 - DESIGN, INSTALLATION AND PRODUCT FOR SYSTEMS FURNITURE.	(\$1,502.54)	(\$1,502.54)	2015	1/12/2015	SS001431982	SS001260003	1	OTHER THAN SMALL BUSINESS
HERMAN MILLER, INC.	BROOKLYN BEDFORD HEIGHTS, NY #A160 - TWO NEW HIRES AND REQUIRE TWO NEW SYSTEMS FURNITURE WORKSTATIONS - MODIFICATION TO REDUCE QUANTITIES	(\$1,737.00)	(\$1,737.00)	2016	8/19/2016	SS001630593	SS001260003	1	OTHER THAN SMALL BUSINESS
HERMAN MILLER, INC.	DESIGN SERVICES, PRODUCT AND INSPECTION OF HM WORKSTATIONS FOR DALLAS, TX #SB86 FOR SYSTEMS FURNITURE.	(\$1,842.56)	(\$1,842.56)	2015	1/5/2015	SS001431980	SS001260003	1	OTHER THAN SMALL BUSINESS
HERMAN MILLER, INC.	C197 OWINGS MILLS, MD - DESIGN, INSTALLATION AND PRODUCT ESTIMATE FOR THE REPLACEMENT OF THE CURRENT WORK SURFACE IN THE (PI) ROOM WITH (1) CONCAVE TABLE TO IMPROVE BOTH REACH AND ACCESSIBILITY IN THE ROOM FOR SYSTEMS FURNITURE - MODIFICATION TO DECREASE PRODUCT.	(\$1,868.90)	(\$1,868.90)	2016	8/18/2016	SS001630260	SS001260003	1	OTHER THAN SMALL BUSINESS
HERMAN MILLER, INC.	RIVERHEAD, NY X163 DESIGN, INSTALL AND PRODUCT OF SYSTEMS FURNITURE	(\$1,919.01)	(\$1,919.01)	2015	8/3/2015	SS001431660	SS001260003	2	OTHER THAN SMALL BUSINESS
KONIAG SERVICES INC	IGF::CT::IGF CRITICAL FUNCTIONS	(\$2,000.00)	(\$2,000.00)	2016	12/9/2015	42	SS000960009	1	SMALL BUSINESS
HERMAN MILLER, INC.	YAKIMA, WA I919 - RECONFIGURATION OF TWO X-95 WORKSTATIONS (#19 AND #20) INTO MA WORKSTATIONS FOR SYSTEMS FURNITURE.	(\$2,027.78)	(\$2,027.78)	2015	6/17/2015	SS001530208	SS001260003	1	OTHER THAN SMALL BUSINESS
HERMAN MILLER, INC.	TIFTON, GA #XC95 DESIGN, INSTALLATION AND PRODUCT FOR SYSTEMS FURNITURE	(\$2,063.57)	(\$2,063.57)	2015	12/15/2014	SS001431657	SS001260003	1	OTHER THAN SMALL BUSINESS
HEALTH AND WELFARE IDAHO DEPARTMENT OF	IGF::OT::IGF DELIVERY ORDER FOR EAB CONTRACT SS00-08-60029 - IDAHO	(\$2,168.64)	(\$2,168.64)	2015	12/1/2014	SS001330440	SS000860029	1	OTHER THAN SMALL BUSINESS
HERMAN MILLER, INC.	KISSIMMEE, FL XA16 DESIGN, INSTALLATION AND PRODUCT FOR SYSTEMS FURNITURE	(\$2,296.62)	(\$2,296.62)	2015	12/15/2014	SS001431532	SS001260003	1	OTHER THAN SMALL BUSINESS
HERMAN MILLER, INC.	NEW ORLEANS WESTBANK TERRYTOWN LA #AA70 - SYSTEMS FURNITURE - 2 NEW P-95 WORKSTATIONS, AND 3 OTHER EXISTING WORKSTATIONS AFFECTED.	(\$2,330.81)	(\$2,330.81)	2015	1/12/2015	SS001432039	SS001260003	1	OTHER THAN SMALL BUSINESS
KONIAG SERVICES INC	IGF::CT::IGF CRITICAL FUNCTIONS	(\$2,502.24)	(\$2,502.24)	2016	12/9/2015	47	SS000960009	2	SMALL BUSINESS
HERMAN MILLER, INC.	ROCKVILLE, MD #BA33 DESIGN, INSTALLATION AND PRODUCT FOR SYSTEMS FURNITURE	(\$2,798.40)	(\$2,798.40)	2015	3/30/2015	SS001431656	SS001260003	2	OTHER THAN SMALL BUSINESS
HERMAN MILLER, INC.	DESIGN SERVICES, INSTALLATION SERVICES, PRODUCT, AND TRAVEL FOR IRONTON, OH VA21 FOR SYSTEMS FURNITURE - MODIFICATION TO DECREASE TRAVEL	(\$2,840.40)	(\$2,840.40)	2017	10/27/2016	SS001131126	SS06000160104S	2	OTHER THAN SMALL BUSINESS
HERMAN MILLER, INC.	MERRILLVILLE, IN DO #CD61 - DESIGN, INSTALLATION AND PRODUCT ESTIMATE FOR SYSTEMS FURNITURE - MODIFICATION TO DECREASE PRODUCT	(\$2,893.85)	(\$2,893.85)	2016	8/18/2016	SS001630200	SS001260003	1	OTHER THAN SMALL BUSINESS
HERMAN MILLER, INC.	FAJARDO, PR IC71 DESIGN, INSTALLATION, PRODUCT, OCEAN FREIGHT FOR SYSTEMS FURNITURE - MODIFICATION TO DECREASE FREIGHT COSTS	(\$2,902.17)	(\$2,902.17)	2015	3/30/2015	SS001431564	SS001260003	2	OTHER THAN SMALL BUSINESS
ROSS, JEROME H LTD	IGF::OT::IGF MODIFICATION TO CHANGE PERIOD OF PERFORMANCE FOR HEARING DAYS FROM 4 DAYS TO 3 DAYS.	(\$3,000.00)	(\$3,000.00)	2016	8/1/2016	SS001650184		1	SMALL BUSINESS
HERMAN MILLER, INC.	RIVERHEAD, NY X163 DESIGN, INSTALL AND PRODUCT OF SYSTEMS FURNITURE	(\$3,038.00)	(\$3,038.00)	2015	5/1/2015	SS001431660	SS001260003	1	OTHER THAN SMALL BUSINESS
HEALTH INDIANA DEPARTMENT OF	IGF::OT::IGF	(\$3,114.91)	(\$3,114.91)	2015	3/19/2015	SS001330169	SS000860031	1	OTHER THAN SMALL BUSINESS
HERMAN MILLER, INC.	YD51 PUYALLUP, WA DESIGN, INSTALL AND PRODUCT ESTIMATE FOR SYSTEMS FURNITURE.	(\$3,182.36)	(\$3,182.36)	2015	3/27/2015	SS001530038	SS001260003	1	OTHER THAN SMALL BUSINESS
KONIAG SERVICES INC	IGF::CT::IGF CRITICAL FUNCTIONS	(\$3,449.71)	(\$3,449.71)	2016	12/9/2015	43	SS000960009	1	SMALL BUSINESS
HERMAN MILLER, INC.	KENNER, LA #CA71 TO RAISE PANELS FOR SYSTEMS FURNITURE	(\$3,476.65)	(\$3,476.65)	2015	12/15/2014	SS001431658	SS001260003	1	OTHER THAN SMALL BUSINESS
HERMAN MILLER, INC.	BAYAMON, PR B198 DESIGN, INSTALLATION AND PRODUCT FOR SYSTEMS FURNITURE.	(\$3,719.10)	(\$3,719.10)	2015	5/1/2015	SS001431804	SS001260003	1	OTHER THAN SMALL BUSINESS
HERMAN MILLER, INC.	BOCA RATON, FL IC16 DESIGN AND INSTALLATION FOR SYSTEMS FURNITURE; MOD TO REDUCE PRODUCT	(\$3,802.84)	(\$3,802.84)	2016	4/18/2016	SS001630048	SS001260003	1	OTHER THAN SMALL BUSINESS
KONIAG SERVICES INC	IGF::CT::IGF CRITICAL FUNCTIONS	(\$4,000.00)	(\$4,000.00)	2016	12/9/2015	46	SS000960009	1	SMALL BUSINESS
KONIAG SERVICES INC	IGF::CT::IGF CRITICAL FUNCTIONS								
KONIAG SERVICES INC	DSUSF - CONTRACTOR SERVICES (4) TO SUPPORT ENVIRONMENTAL AREAS (ELEC, HVAC ETC.).	(\$4,000.00)	(\$4,000.00)	2016	12/2/2015	41	SS000960009	1	SMALL BUSINESS
KONIAG SERVICES INC	CONTRACT CLOSEOUT	(\$4,245.04)	(\$4,245.04)	2015	5/19/2015	14	SS000960009	2	SMALL BUSINESS

Vendor Name	Description of Requirement	Action Obligation	Base and All Options Value	Fiscal Year	Date Signed	PO/Delivery Order/Task Order/Call#	Parent Contract	Mod #	Contracting Officers Business Size Selection
HEALTH AND HUMAN SERVICES ARKANSAS DEPARTMENT OF (7358)	IGF::OT::IGF TO DEOBLIGATE ALL FUNDS REMAINING UNDER CONTRACT SS00-08-60020, TASK ORDER SS00-13-30435.	(\$4,425.13)	(\$4,425.13)	2015	5/14/2015	SS001330435	SS000860020	1	OTHER THAN SMALL BUSINESS
HERMAN MILLER, INC.	DURHAM, NC #B328 DESIGN, INSTALLATION AND PRODUCT FOR SYSTEMS FURNITURE	(\$4,636.77)	(\$4,636.77)	2015	3/31/2015	SS001431634	SS001260003	2	OTHER THAN SMALL BUSINESS
HERMAN MILLER, INC.	RIO PIEDRAS, PR A271 PRODUCT AND OCEAN FREIGHT MODIFICATION OF CONTRACT.	(\$4,892.76)	(\$4,892.76)	2016	5/12/2016	SS001530068	SS001260003	3	OTHER THAN SMALL BUSINESS
HERMAN MILLER, INC.	MT. PLEASANT TX FO #XI22. INSTALLATION OF A P-01 WORKSTATION, 1 / 2 OTHER WORKSTATIONS AFFECTED; TOTAL 3, MODIFICATION TO DECREASE PRODUCT.	(\$5,098.16)	(\$5,098.16)	2016	6/16/2016	SS001630136	SS001260003	1	OTHER THAN SMALL BUSINESS
HERMAN MILLER, INC.	GAINESVILLE, GA A612 DESIGN, INSTALLATION AND PRODUCT FOR SYSTEMS FURNITURE	(\$5,158.02)	(\$5,158.02)	2015	3/30/2015	SS001431565	SS001260003	2	OTHER THAN SMALL BUSINESS
HERMAN MILLER, INC.	B926 KITSAP/SILVERDALE, WA - DESIGN SERVICES, INSTALLATION SERVICES AND PRODUCT ESTIMATE FOR SYSTEMS FURNITURE.	(\$5,486.37)	(\$5,486.37)	2015	8/20/2015	SS001530039	SS001260003	2	OTHER THAN SMALL BUSINESS
HERMAN MILLER, INC.	PORTLAND, OR CBT28 ODAR - RECONFIGURATION SYSTEMS FURNITURE	(\$5,600.54)	(\$5,600.54)	2015	8/4/2015	SS001530240	SS001260003	1	OTHER THAN SMALL BUSINESS
NEOPOST USA INC.	IGF::OT::IGF STANDARD MAINTENANCE FOR NEOPOST FOLDER INSERTER	(\$5,634.12)	(\$5,634.12)	2016	8/17/2016	SS041650003		2	OTHER THAN SMALL BUSINESS
HERMAN MILLER, INC.	KISSIMMEE, FL AA16 DESIGN, INSTALLATION AND PRODUCT FOR SYSTEMS FURNITURE	(\$5,857.91)	(\$5,857.91)	2015	8/20/2015	SS001530349	SS001260003	1	OTHER THAN SMALL BUSINESS
HERMAN MILLER, INC.	FREEPORT, NY A151 - DESIGN, INSTALLATION AND PRODUCT OF SYSTEMS FURNITURE	(\$6,513.86)	(\$6,513.86)	2015	12/16/2014	SS001431596	SS001260003	1	OTHER THAN SMALL BUSINESS
HERMAN MILLER, INC.	GERMANTOWN, PA B218 - DESIGN, INSTALLATION AND PRODUCT FOR SYSTEMS FURNITURE	(\$6,546.71)	(\$6,546.71)	2015	7/20/2015	SS001530326	SS001260003	1	OTHER THAN SMALL BUSINESS
HERMAN MILLER, INC.	B167 KAPOLEI, HI - DESIGN, INSTALLATION AND PRODUCT FOR SYSTEMS FURNITURE. MODIFICATION 1 IS TO DECREASE PRODUCT REQUIRED FOR THE PROJECT.	(\$6,673.30)	(\$6,673.30)	2016	3/1/2016	SS001530499	SS001260003	1	OTHER THAN SMALL BUSINESS
HERMAN MILLER, INC.	CONWAY, SC I592 DESIGN, INSTALLATION AND PRODUCT FOR SYSTEMS FURNITURE	(\$6,800.98)	(\$6,800.98)	2015	1/12/2015	SS001431668	SS001260003	1	OTHER THAN SMALL BUSINESS
HERMAN MILLER, INC.	SYSTEMS FURNITURE - SAN DIEGO, CA TSC IS MOVING TO THE SAN DIEGO, CA FO	(\$6,810.74)	(\$6,810.74)	2015	5/29/2015	SS001431443	SS001260003	1	OTHER THAN SMALL BUSINESS
MASSACHUSETTS MEDICAL SOCIETY	IGF::OT::IGF MODIFICATION FOR THE PARTIAL TERMINATION OF THIS ORDER.	(\$6,878.00)	(\$6,878.00)	2016	8/25/2016	SS001650028		1	OTHER THAN SMALL BUSINESS
KONIAG SERVICES INC	CONTRACT CLOSEOUT	(\$6,993.27)	(\$6,993.27)	2015	5/19/2015		12 SS000960009	1	SMALL BUSINESS
HERMAN MILLER, INC.	LUMBERTON, NC B338 DESIGN, INSTALLATION AND PRODUCT FOR SYSTEMS FURNITURE.	(\$7,184.47)	(\$7,184.47)	2015	5/6/2015	SS001431713	SS001260003	2	OTHER THAN SMALL BUSINESS
HERMAN MILLER, INC.	CONCORD, NH #A010 DESIGN, INSTALLATION AND PRODUCT FOR SYSTEMS FURNITURE	(\$7,254.70)	(\$7,254.70)	2015	5/29/2015	SS001530141	SS001260003	1	OTHER THAN SMALL BUSINESS
HERMAN MILLER, INC.	EVANSVILLE, IN RX84 - DESIGN, INSTALLATION AND PRODUCT ESTIMATE FOR SYSTEMS FURNITURE. MODIFICATION IS TO DECREASE PRODUCT ORDERED.	(\$7,431.15)	(\$7,431.15)	2016	4/13/2016	SS001530255	SS001260003	1	OTHER THAN SMALL BUSINESS
KONIAG SERVICES INC	SS00-09-60009 SYSTEMS OPERATION SUPPORT SERVICES	(\$7,478.05)	(\$7,478.05)	2016	12/9/2015		9 SS000960009	2	SMALL BUSINESS
KONIAG SERVICES INC	CONTRACT CLOSEOUT			2016	12/2/2015				
UNITED STATES POSTAL SERVICE	IGF::OT::IGF	(\$7,810.58)	(\$7,810.58)	2016	12/2/2015		37 SS000960009	1	SMALL BUSINESS
	IGF::CT::IGF ANNUAL RENEWAL POST OFFICES BOXES	(\$7,920.00)	(\$7,920.00)	2016	10/7/2015	SS051550009		1	OTHER THAN SMALL BUSINESS
HERMAN MILLER, INC.	FT. SMITH, AR ODAR OFFICE #XX55 SYSTEMS FURNITURE WORKSTATION - MODIFICATION TO REDUCE PRODUCT AND INSTALLATION SERVICES	(\$8,087.24)	(\$8,087.24)	2016	7/27/2016	SS001630057	SS001260003	2	OTHER THAN SMALL BUSINESS
SABREE, INC.	IGF::OT::IGF  CAGE CODE: 4KUQ1  ISSUE FORMAL NOTICE TO PROCEED AND MODIFY STATEMENT OF WORK.	(\$8,137.50)	(\$8,137.50)	2015	2/10/2015	SS001530123	SS001461113	1	SMALL BUSINESS
WELCH CONSULTING, LTD	IGF::CT::IGF: EXPERT WITNESS SERVICES FOR A CLASS ACTION LITIGATION - EXERCISE OPTION PERIOD II	\$50,200.00	(\$8,300.00)	2015	8/5/2015	SS001360024		5	OTHER THAN SMALL BUSINESS
HERMAN MILLER, INC.	KOSCIUSKO, MS #CB15 - DESIGN, INSTALLATION AND PRODUCT FOR SYSTEMS FURNITURE.	(\$8,644.52)	(\$8,644.52)	2015	9/10/2015	SS001530325	SS001260003	1	OTHER THAN SMALL BUSINESS
UNITED STATES POSTAL SERVICE	IGF::CT::IGF RENEWAL OF PO BOXES AND CALL SERVICE FOR THE HWSSC. THIS ITEM MUST BE PAID FOR LOCALLY, AT THE POST OFFICE, IN PERSON.	(\$8,908.00)	(\$8,908.00)	2016	9/21/2016	SS051650008		1	OTHER THAN SMALL BUSINESS



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NEOPOST USA INC.	IGF::CT::IGF EXCHANGE 1 METER FOR ANOTHER AND DISCONTINUE RENTAL OF 3 OTHER METERS.	(\$1,277.28)	(\$8,940.96)	2016	8/30/2016	SS001550057		4	OTHER THAN SMALL BUSINESS
CONCISE INC.	TASK ORDER FOR INSTALLATION DATA CABLE FOR WIRELESS ACCESS POINT THROUGHOUT THE RTP OFFICE UTILIZING CONCISE, INC. CONTRACT SS00-09-60098	(\$9,203.86)	(\$9,203.86)	2016	4/7/2016	SS001130747	SS000960098	1	SMALL BUSINESS
HERMAN MILLER, INC.	DECATUR, GA A621 DESIGN, INSTALLATION AND PRODUCT OF SYSTEMS FURNITURE	(\$9,321.41)	(\$9,321.41)	2015	2/12/2015	SS001431473	SS001260003	1	OTHER THAN SMALL BUSINESS
HERMAN MILLER, INC.	MIDDLEBORO, KY ODAR RX47 PRODUCT, DESIGN, AND INSTALLATION SERVICES FOR SYSTEMS FURNITURE.	(\$9,704.31)	(\$9,704.31)	2015	12/16/2014	SS001331066	SS001260003	1	OTHER THAN SMALL BUSINESS
T C G MANAGEMENT CORP	IGF::OT::IGF CONTRACT CLOSEOUT	(\$10,276.56)	(\$10,276.56)	2015	4/1/2015	SS001360041		2	SMALL BUSINESS
HERMAN MILLER, INC.	ELKINS PARKS, PA MT26 ODAR DESIGN, INSTALLATION AND PRODUCT FOR SYSTEMS FURNITURE.	(\$10,446.66)	(\$10,446.66)	2015	3/18/2015	SS001530054	SS001260003	1	OTHER THAN SMALL BUSINESS
HERMAN MILLER, INC.	JUNEAU, AK C996 - DESIGN, PRODUCT ESTIMATE AND INSTALL SERVICES FOR SYSTEMS FURNITURE.	(\$10,551.64)	(\$10,551.64)	2015	8/20/2015	SS001530156	SS001260003	1	OTHER THAN SMALL BUSINESS
SABREE, INC.	IGF::OT::IGF  CAGE CODE: 4KUQ1  ISSUE FORMAL NOTICE TO PROCEED AND MODIFY STATEMENT OF WORK	(\$10,730.70)	(\$10,730.70)	2015	1/12/2015	SS001530082	SS001461113	1	SMALL BUSINESS
WASHINGTON STATE DEPARTMENT OF HEALTH	NON-ELECTRONIC DEATH REGISTRATION - WASHINGTON STATE	(\$10,967.26)	(\$10,967.26)	2016	9/9/2016	SS001130399	SS000660069	2	OTHER THAN SMALL BUSINESS
DEPARTMENT OF HEALTH OHIO (4820)	IGF::OT::IGF OTHER FUNCTIONS	(\$11,056.55)	(\$11,056.55)	2016	10/21/2015	SS001330117	SS000860053	1	OTHER THAN SMALL BUSINESS
UNITED STATES POSTAL SERVICE	THE PURPOSE OF THIS MODIFICATION IS CHANGE THE METHOD OF PAYMENT FROM PURCHASE CARD TO INVOICE IGF::CL::IGF	(\$11,520.00)	(\$11,520.00)	2016	4/27/2016	SS031650002		2	OTHER THAN SMALL BUSINESS
HERMAN MILLER, INC.	RIO PIEDRAS, PR A271 DESIGN, INSTALLATION, PRODUCT, OCEAN FREIGHT FOR SYSTEMS FURNITURE, MODIFICATION OF CONTRACT.	(\$12,880.50)	(\$12,880.50)	2016	12/18/2015	SS001530068	SS001260003	2	OTHER THAN SMALL BUSINESS
WELCH CONSULTING, LTD	IGF::CT::IGF - BILATERAL MODIFICATION TO ACKNOWLEDGE AND CORRECT AN ERROR THAT OCCURRED UNDER MODIFICATION 000002 ISSUED 06/10/2015, THAT INADVERTENTLY REMOVED CLIN 0007, ANALYST I, FROM THE OPTION PERIOD I PERIOD OF PERFORMANCE EXERCISED VIA MODIFICATION 000003 ON 06/11/2015. THIS MODIFICATION WILL ALSO ADJUST THE LEVEL OF EFFORT FOR CLINS 00005 AND 00007 TO REFLECT AS SHOWN BELOW TO ALLOW FOR ACTUAL EFFORT WORKED DURING OPTION PERIOD I FOR RESOURCES PROPOSED UNDER CLINS 00005 AND 00007. THIS IS MERELY TO CORRECT ADMINISTRATIVE ELEMENTS NEEDED TO RECTIFY INVOICES SUBMITTED DURING OPTION PERIOD I.	(\$16,305.00)	(\$14,485.00)	2016	8/17/2016	SS001461104		8	OTHER THAN SMALL BUSINESS
PUBLIC HEALTH MASSACHUSETTS DEPT OF	DCOSS-ELECTRONIC DEATH REGISTRATION (EDR) FOR THE STATE OF MASSACHUSETTS 2011	(\$15,436.98)	(\$15,436.98)	2016	8/26/2016	SS001130301	SS000660036	1	OTHER THAN SMALL BUSINESS
HERMAN MILLER, INC.	#J879 ROCK SPRINGS, WY - DESIGN, INSTALLATION AND PRODUCT ESTIMATE FOR SYSTEMS FURNITURE.	(\$16,513.52)	(\$16,513.52)	2015	4/21/2015	SS001431539	SS001260003	1	OTHER THAN SMALL BUSINESS
UNITED STATES POSTAL SERVICE	THE PURPOSE OF THIS MODIFICATION IS TO CHANGE THE PAYMENT TYPE FROM PURCHASE CARD TO INVOICE. THIS MODIFICATION WILL REDUCE THE AMOUNT OF MONEY TO ZERO AND RESTORE THE FUNDING ON THE FOLLOW ON MODIFICATION. IGF::CL::IGF	(\$16,640.00)	(\$16,640.00)	2016	7/12/2016	SS031650006		1	OTHER THAN SMALL BUSINESS
HERMAN MILLER, INC.	LOUISVILLE, KY MX80 DESIGN, INSTALLATION AND PRODUCT FOR SYSTEMS FURNITURE.	(\$18,762.35)	(\$18,762.35)	2016	11/16/2015	SS001431841	SS001260003	1	OTHER THAN SMALL BUSINESS
KONIAG SERVICES INC	CONTRACT# SS00-09-60009 SECURITY OPERATIONS CENTER - REMEDIATION SSC FOR DISSAO	(\$19,407.96)	(\$19,407.96)	2016	10/7/2015		24 SS000960009	1	SMALL BUSINESS
HERMAN MILLER, INC.	ST GEORGE, UT RA07 DESIGN, INSTALL, ESTIMATED PRODUCT FOR OFFICE RELOCATION FOR SYSTEMS FURNITURE. MODIFICATION TO REDUCE PRODUCT.	(\$19,940.32)	(\$19,940.32)	2016	4/18/2016	SS001530355	SS001260003	2	OTHER THAN SMALL BUSINESS
KONIAG SERVICES INC	SECURITY OPERATIONS CENTER - IDS	(\$20,445.33)	(\$20,445.33)	2016	10/7/2015		29 SS000960009	1	SMALL BUSINESS
HERMAN MILLER, INC.	LAKEPORT, CA AA32 - DESIGN, INSTALLATION AND PRODUCT ESTIMATE FOR 2 ADD-ON WORKSTATIONS FOR NEW HIRES FOR SYSTEMS FURNITURE	(\$20,825.20)	(\$20,825.20)	2015	6/30/2015	SS001431953	SS001260003	2	OTHER THAN SMALL BUSINESS

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KONIAG SERVICES INC	SOSS CONTRACT - SYSTEM OPERATIONS SUPPORT SERVICES IN SUPPORT OF DSSM. IGF::OT::IGF	(\$21,680.57)	(\$21,680.57)	2016	10/7/2015	32	SS000960009	1	SMALL BUSINESS
KONIAG SERVICES INC	OTHER FUNCTION- SUPPORT FOR DITM WIRELESS TEAM IGF::OT::IGF	(\$22,538.85)	(\$22,538.85)	2016	10/28/2015	33	SS000960009	1	SMALL BUSINESS
BALTIMORE SOUND ENGINEERING, INC.	IGF::OT::IGF OTHER FUNCTION  EXERCISE OPTION YEAR II AND CHANGES TO SECTIONS A-3, B-1.3, D-1 AND D-2 OF THE STATEMENT OF WORK  PA SYSTEM WARRANTY AND REPAIR CONTRACT	\$15,509.00	(\$23,263.96)	2015	8/11/2015	SS001360029		2	SMALL BUSINESS
KONIAG SERVICES INC	CONTRACTOR SUPPORT FOR THE WINDOWS 7 CONVERSION IN SUPPORT OF THE DIVISION OF NATIONAL NETWORK SYSTEMS OPERATIONS (DNNSO) FOR THE NATIONAL COMPUTER CENTER (NCC)	(\$27,204.57)	(\$27,204.57)	2016	10/7/2015	26	SS000960009	1	SMALL BUSINESS
HEALTH AND ENVIRONMENT, KANSAS DEPARTMENT OF	DCOSS-ELECTRONIC DEATH REGISTRATION (EDR) FOR THE STATE OF KANSAS 2011	(\$27,927.01)	(\$27,927.01)	2016	9/26/2016	SS001130291	SS000960020	1	OTHER THAN SMALL BUSINESS
KONIAG SERVICES INC	CONTRACT CLOSEOUT	(\$28,072.12)	(\$28,072.12)	2015	5/13/2015	4	SS000960009	3	SMALL BUSINESS
KONIAG SERVICES INC	CONTRACT CLOSEOUT	(\$28,361.44)	(\$28,361.44)	2015	5/13/2015	11	SS000960009	1	SMALL BUSINESS
HERMAN MILLER, INC.	CASA GRANDE, AZ #R903 - DESIGN, INSTALLATION AND PRODUCT ESTIMATE FOR SYSTEMS FURNITURE. MODIFICATION 1 IS TO DECREASE PRODUCT REQUIRED FOR THE PROJECT.	(\$31,355.90)	(\$31,355.90)	2016	3/1/2016	SS001530416	SS001260003	1	OTHER THAN SMALL BUSINESS
KONIAG SERVICES INC	CONTRACTOR SUPPORT FOR WINDOWS 7 CONVERSION IN SUPPORT OF THE DIVISION OF NATIONAL NETWORK SYSTEMS OPERATIONS (DNNSO) FOR THE SECOND SUPPORT CENTER.	(\$33,529.15)	(\$33,529.15)	2016	10/7/2015	27	SS000960009	1	SMALL BUSINESS
HERMAN MILLER, INC.	BLUEFIELD WV #G311 DESIGN, INSTALLATION SERVICES AND PRODUCT FOR SYSTEMS FURNITURE - TERMINATION OF TASK ORDER	(\$34,207.05)	(\$34,207.05)	2016	7/27/2016	SS001530737	SS001260003	1	OTHER THAN SMALL BUSINESS
HERMAN MILLER, INC.	BOGALUSA, LA SYSTEMS FURNITURE								
HERMAN MILLER, INC.	N/A PRIOR TO 03/01/2012	(\$34,884.79)	(\$34,884.79)	2015	12/16/2014	SS001330956	SS001260003	2	OTHER THAN SMALL BUSINESS
HERMAN MILLER, INC.	JACKSONVILLE, FL #IX41 DESIGN, INSTALLATION AND PRODUCT FOR SYSTEMS FURNITURE	(\$38,496.65)	(\$38,496.65)	2015	6/29/2015	SS001431604	SS001260003	1	OTHER THAN SMALL BUSINESS
HERMAN MILLER, INC.	JACKSONVILLE, FL IX41 PRODUCT AND INSTALLATION FOR SYSTEMS FURNITURE - TERMINATION OF ORDER FOR CONVENIENCE DUE TO DELAYS	(\$38,965.06)	(\$38,965.06)	2016	7/27/2016	SS001530759	SS001260003	2	OTHER THAN SMALL BUSINESS
NUANCE COMMUNICATIONS, INC.	NUANCE PURCHASE FOR DMA EXERCISING OPTION YEAR 3	\$40,800.00	(\$40,800.00)	2016	2/8/2016	SS001350078		3	SMALL BUSINESS
KONIAG SERVICES INC	CONTRACT CLOSEOUT	(\$41,964.94)	(\$41,964.94)	2015	5/13/2015	10	SS000960009	1	SMALL BUSINESS
KONIAG SERVICES INC	MAINFRAME TAPE STORAGE MANAGEMENT PROGRAMMING SUPPORT	(\$44,796.99)	(\$44,796.99)	2015	9/1/2015	20	SS000960009	4	SMALL BUSINESS
HERMAN MILLER, INC.	J169 SADDLEBROOK (TSC), NJ - DESIGN, INSTALLATION AND PRODUCT ESTIMATE FOR SYSTEMS FURNITURE. MODIFICATION 1 IS TO DECREASE PRODUCT REQUIRED FOR THE PROJECT.	(\$47,854.02)	(\$47,854.02)	2016	3/1/2016	SS001530321	SS001260003	1	OTHER THAN SMALL BUSINESS
HERMAN MILLER, INC.	LAS VEGAS, NV (ODAR) SX71 DESIGN, PRODUCT AND RELOCATION SERVICES FOR SYSTEMS FURNITURE.	(\$60,603.64)	(\$60,603.64)	2015	8/26/2015	SS001530196	SS001260003	1	OTHER THAN SMALL BUSINESS
KONIAG SERVICES INC	CONTRACT CLOSEOUT	(\$62,202.92)	(\$62,202.92)	2015	5/20/2015	17	SS000960009	2	SMALL BUSINESS
KONIAG SERVICES INC	OTHER FUNCTION-SS00-09-60009-SINGLE POINT OF FAILURE IN SUPPORT OF DOSDO. IGF::OT::IGF	(\$62,310.90)	(\$62,310.90)	2016	12/9/2015	34	SS000960009	1	SMALL BUSINESS
HERMAN MILLER, INC.	SAN JUAN, PR #AE04 SYSTEMS FURNITURE DESIGN, INSTALLATION AND PRODUCT FOR SYSTEMS FURNITURE.	(\$64,165.50)	(\$64,165.50)	2016	11/16/2015	SS001432040	SS001260003	3	OTHER THAN SMALL BUSINESS
WELCH CONSULTING, LTD	IGF::CT::IGF - EXPERT WITNESS SERVICES TO PROVIDE ASSISTANCE FOR CLASS ACTION CASES - EXERCISE OPTION PERIOD II	\$60,015.00	(\$64,590.00)	2016	6/6/2016	SS001461104		7	OTHER THAN SMALL BUSINESS
HERMAN MILLER, INC.	OAKLAND, CA ODAR - DESIGN, INSTALLATION AND ESTIMATE PRODUCT - OFFICE EXPANSION ADD 9 NEW WORKSTATIONS FOR SYSTEMS FURNITURE.	(\$73,034.52)	(\$73,034.52)	2015	5/12/2015	SS001431103	SS001260003	1	OTHER THAN SMALL BUSINESS
HERMAN MILLER, INC.	LONG ISLAND - CENTRAL ISLIP, NY ODAR SX70 DESIGN, INSTALLATION AND PRODUCT FOR SYSTEMS FURNITURE	(\$79,374.55)	(\$79,374.55)	2015	3/19/2015	SS001431655	SS001260003	1	OTHER THAN SMALL BUSINESS
KONIAG SERVICES INC	SS00-09-60009 SUPPORT SERVICES FOR DLM	(\$85,268.38)	(\$85,268.38)	2015	9/2/2015	22	SS000960009	2	SMALL BUSINESS
KONIAG SERVICES INC	CONTRACT CLOSEOUT	(\$90,446.76)	(\$90,446.76)	2015	5/20/2015	15	SS000960009	4	SMALL BUSINESS

Vendor Name	Description of Requirement	Action Obligation	Base and All Options Value	Fiscal Year	Date Signed	PO/Delivery Order/Task Order/Call#	Parent Contract	Mod #	Contracting Officers Business Size Selection
HERMAN MILLER, INC.	ROCKINGHAM, NC C342 SYSTEMS FURNITURE - THIS TASK ORDER IS A DUPLICATE - THIS WAS ORDERED ON SS00-15-30979.	(\$95,734.35)	(\$95,734.35)	2016	7/12/2016	SS001630347	SS001260003	1	OTHER THAN SMALL BUSINESS
WELCH CONSULTING, LTD	IGF::CT::IGF - EXPERT WITNESS SERVICES TO PROVIDE ASSISTANCE FOR CLASS ACTION CASES	\$0.00	(\$100,605.00)	2015	6/9/2015	SS001461104		2	OTHER THAN SMALL BUSINESS
HERMAN MILLER, INC.	STILLWATER, OK (RB46) - SERVICES (DESIGN, INSTALLATION AND ESTIMATED PRODUCT FOR SYSTEMS FURNITURE - MODIFICATION TO DECREASE PRODUCT AND SERVICES	(\$101,022.08)	(\$101,022.08)	2016	7/29/2016	SS001530631	SS001260003	1	OTHER THAN SMALL BUSINESS
HERMAN MILLER, INC.	FALMOUTH, MA #VB88 - DESIGN PRODUCT ESTIMATE AND INSTALLATION SERVICES FOR SYSTEMS FURNITURE.	(\$101,184.40)	(\$101,184.40)	2015	7/9/2015	SS001431097	SS001260003	2	OTHER THAN SMALL BUSINESS
KONIAG SERVICES INC	SS00-09-60009 ELIMINATE SINGLE POINTS OF FAILURE IN CICS ENVIRONMENT - SS	(\$110,776.18)	(\$110,776.18)	2015	9/2/2015	23	SS000960009	1	SMALL BUSINESS
KONIAG SERVICES INC	CONTRACT CLOSEOUT	(\$116,305.18)	(\$116,305.18)	2015	5/20/2015	16	SS000960009	3	SMALL BUSINESS
KONIAG SERVICES INC	SECURITY OPERATIONS CENTER - REMEDIATION	(\$123,260.01)	(\$123,260.01)	2016	10/7/2015	28	SS000960009	1	SMALL BUSINESS
HEALTHCARE SERVICES, CALIFORNIA DEPARTMENT OF	N/A PRIOR 03/01/2012 INVESTIGATIVE SERVICES	(\$130,102.12)	(\$130,102.12)	2015	9/16/2015	SS090862002		5	OTHER THAN SMALL BUSINESS
HERMAN MILLER, INC.	BALTIMORE, MD DO #R020 CHANGE IN SYSTEMS FURNITURE ORDER DUE TO CONSTRUCTION DELAYS.	(\$132,598.45)	(\$132,598.45)	2016	1/8/2016	SS001530078	SS001260003	1	OTHER THAN SMALL BUSINESS
KONIAG SERVICES INC	CONTRACT CLOSEOUT	(\$134,929.97)	(\$134,929.97)	2015	8/13/2015	19	SS000960009	1	SMALL BUSINESS
KONIAG SERVICES INC	CONTINUE CONTRACTOR SERVICES ON CONTRACT SS00-09-60009 SYSTEMS OPERATION SUPPORT SERVICES IN THE SECOND SUPPORT CENTER (SSC).	(\$143,737.78)	(\$143,737.78)	2015	9/1/2015	21	SS000960009	2	SMALL BUSINESS
HERMAN MILLER, INC.	SAN LUIS OBISPO, CA C986 - DESIGN,INSTALLATION AND PRODUCT ESTIMATE FOR SYSTEMS FURNITURE - PARTIAL CANCELLATION OF ORDER.	(\$158,166.54)	(\$158,166.54)	2016	7/20/2016	SS001530547	SS001260003	1	OTHER THAN SMALL BUSINESS
INTEGRITY NATIONAL CORPORATION	CONTRACT CLOSEOUT	(\$198,218.87)	(\$198,218.87)	2015	12/16/2014	SS000860076		22	SMALL BUSINESS
HERMAN MILLER, INC.	PANAMA CITY, FL #R668 - DESIGN SERVICES, INSTALLATION SERVICES AND ESTIMATED PRODUCT FOR 47 WORKSTATIONS FOR SYSTEMS FURNITURE.	(\$213,045.18)	(\$213,045.18)	2015	5/20/2015	SS001431078	SS001260003	2	OTHER THAN SMALL BUSINESS
KONIAG SERVICES INC	CONTRACTOR SUPPORT SOSS KSI SS00-09-60009 IN SUPPORT OF THE SSC.	(\$260,710.53)	(\$260,710.53)	2016	10/7/2015	31	SS000960009	1	SMALL BUSINESS
HEALTH RESEARCH, INC.	IGF::OT::IGF OTHER FUNCTION NY EXERCISE OPTION YEAR 2 ENUMERATION AT BIRTH (EAB) THE CONTRACTOR SHALL PROVIDE BIRTH RECORDS FOR THE PURPOSE OF OBTAINING SOCIAL SECURITY NUMBER (SSN) AT BIRTH IN ACCORDANCE WITH THE ATTACHED STATEMENT OF WORK.	\$460,016.15	(\$261,334.36)	2016	4/18/2016	SS001461093		2	OTHER THAN SMALL BUSINESS
ASSOCIATION INTERNATIONALE DE LA SECURITE SOCIALE (AISS)	SOCIAL SECURITY PROGRAMS THROUGHOUT THE WORLD&SOCIAL SECURITY WORLDWIDE, ORES	(\$290,713.00)	(\$290,713.00)	2016	7/15/2016	SS000960108		9	OTHER THAN SMALL BUSINESS
KONIAG SERVICES INC	CONTRACT CLOSEOUT	(\$371,074.91)	(\$371,074.91)	2015	5/19/2015	13	SS000960009	1	SMALL BUSINESS
KONIAG SERVICES INC	CONTRACT CLOSEOUT	(\$443,183.55)	(\$443,183.55)	2015	5/12/2015	2	SS000960009	5	SMALL BUSINESS
CHIMES DISTRICT OF COLUMBIA INCORPORATED	JANITORIAL/CUSTODIAL SERVICES AT THE SSA METRO WEST COMPLEX IN BALTIMORE, MD. - FOLLOW-ON YEAR 4	(\$662,181.68)	(\$662,181.68)	2016	10/27/2015	SS000860002		33	OTHER THAN SMALL BUSINESS
KONIAG SERVICES INC	CONTRACT CLOSEOUT	(\$781,012.51)	(\$781,012.51)	2015	5/20/2015	18	SS000960009	3	SMALL BUSINESS
KONIAG SERVICES INC	SYSTEM OPERATIONS SUPPORT SERVICES (SOSS) - THE PURPOSE OF THIS MODIFICATION IS TO DE-OBLIGATE UNUSED FUNDS FROM THE TASK ORDER	(\$1,065,726.18)	(\$1,065,726.18)	2016	10/8/2015	30	SS000960009	1	SMALL BUSINESS
ALLIED HEALTH CARE SERVICES	MOD 31 CONTINUE TO FOLLOW-ON PERIOD VII.	\$1,919,671.82	(\$2,209,646.26)	2015	7/31/2015	SS000860128		31	OTHER THAN SMALL BUSINESS

**SES retirement eligibility (current, 5, 10 years)**

- 43 percent of SSA's SES workforce (64 employees) are currently eligible for retirement.
- 61.3 percent of SSA's SES workforce (92 employees) are eligible to retire in the next five years.
- 83.3 percent of SSA's SES workforce (125 employees) are eligible to retire in the next 10 years.

*Note: Data includes Career Senior Executive Service (SES) employees (150) eligible for regular (optional) retirement.*

**Transition Team Member Document--Non-Public Information. This document may be disclosed to  
Authorized Transition Team Members only.**

# Office of Executive and Special Services

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## Senior Executive Service Members (Updated December 15, 2016)

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<b>Almond, Kojuan L.</b>	Associate Commissioner for Civil Rights and Equal Opportunity
<b>Amrhein, Ann T.</b>	Associate Commissioner for Earnings, Enumeration and Administrative Systems
<b>Andrews, Diana E.</b>	Associate Commissioner for Systems Electronic Services
<b>Baldwin Sparks, Kimberly</b>	Deputy Associate Commissioner for Electronic Services and Technology
<b>Barrett, Christopher J.</b>	Associate Commissioner for IT Financial Management and Support
<b>Bennett, Cynthia R.</b>	Associate Commissioner for Customer Service
<b>Berryhill, Nancy A.</b>	Deputy Commissioner for Operations
<b>Bhargava, Anju P.</b>	Senior Advisor to the Deputy Commissioner for Human Resources
<b>Binstock, Seth P.</b>	Associate Commissioner for Acquisition and Grants
<b>Biro, Frank</b>	Associate Commissioner for Budget, Facilities and Security, ODAR
<b>Blair, Jeffrey C.</b>	Associate General Counsel for Program Law
<b>Bloyer, Kelly G.</b>	Assistant Inspector General for Communications and Resource Management
<b>Bogle, Darlynda K.</b>	Executive Secretary
<b>Borland, James C.</b>	Assistant Deputy Commissioner for Communications
<b>Bostick Borden, Vera E.</b>	Associate Commissioner for Quality Review
<b>Bowles, Bernard C.</b>	Assistant Regional Commissioner for Processing Center Operations (New York)

<b>Bowles, Howard E.</b>	Assistant Regional Commissioner for Management and Operations Support (Atlanta)
<b>Breen, Stephen J.</b>	Deputy Regional Commissioner (San Francisco)
<b>Brune, Sean P.</b>	Assistant Deputy Commissioner for Budget, Finance, Quality and Management
<b>Buehler, Rose Mary</b>	Regional Commissioner (Atlanta)
<b>Burrell, Ruby D.</b>	Chief Strategic Officer
<b>Byrd, Kimberly A.</b>	Deputy Assistant Inspector General for Audits (Financial Systems and Operations Audits)
<b>Caldwell, Kathryn A.</b>	Regional Chief Counsel (Chicago)
<b>Callahan, Daniel F.</b>	Deputy General Counsel
<b>Calvert, Donna L.</b>	Assistant Deputy Commissioner for Disability Adjudication and Review
<b>Cardona, Delma L.</b>	Deputy Associate Commissioner for Customer Service
<b>Chesser, Judy L.</b>	Deputy Commissioner for Legislation and Congressional Affairs <b>(N/C)</b>
<b>Childress, Robby A.</b>	Deputy Assistant Inspector General for Investigations (Eastern Field Operations)
<b>Chitwood, Mitchell R.</b>	Associate General Counsel for General Law
<b>Clemons, Gina P.</b>	Associate Commissioner for Disability Policy
<b>Colon-Mollfulleda, Wanda</b>	Deputy Regional Commissioner (Denver)
<b>Conte, Stephen P.</b>	Regional Chief Counsel (New York)
<b>Cristaudo, Frank A.</b>	Executive Counselor to the Commissioner <b>(Ltd)</b>
<b>Cumming, K. Sue</b>	Deputy Associate Commissioner for Public Service and Operations Support
<b>Debelius, Kleo</b>	Deputy Associate Commissioner for Disability Information Systems
<b>Diamond, Lester P.</b>	Deputy Associate Commissioner for Enterprise Support Architecture and Engineering
<b>Donkar, Eli N.</b>	Deputy Chief Actuary (Short-Range)
<b>Dorn, Linda M.</b>	Regional Commissioner (Boston)
<b>Doyle, Bonnie L.</b>	Director, Executive and Special Services Staff
<b>Dumser, Rachel E.</b>	Associate Commissioner for Disability Systems
<b>Eckert, Marti A.</b>	Associate Commissioner for Information Security
<b>Egan, Raymond S.</b>	Assistant Regional Commissioner for Management and Operations Support (New York)

<b>Ellis, Debby S.</b>	Assistant Regional Commissioner for Processing Center Operations (San Francisco)
<b>Evangelista, Stephen G.</b>	Associate Commissioner for Data Exchange and Policy Publications
<b>Everett, Sheila S.</b>	Regional Commissioner (Dallas)
<b>Fellona, Thomas J.</b>	Associate Commissioner for Systems Operations
<b>Flick, Brad A.</b>	Deputy Regional Commissioner (Chicago)
<b>Foley, Dennis R.</b>	Deputy Associate General Counsel for Program Law
<b>Foster, David V.</b>	Senior Advisor to the General Counsel
<b>Foushee, Janice G.</b>	Associate Commissioner for Central Operations
<b>Friendship, Stanley C.</b>	Regional Commissioner (Seattle)
<b>Funnié, Joscelyn N.</b>	Deputy Assistant Inspector General for Communications and Resource Management
<b>Gambino, Philip A.</b>	Senior Advisor to the Deputy Commissioner for Operations
<b>Gangloff, Joseph E.</b>	Counsel to the Inspector General
<b>Garland, Jonas M.</b>	Associate Commissioner for Security and Emergency Preparedness
<b>Garrigues, John</b>	Chief Program Officer
<b>Garrison-Daniels, Elaine</b>	Assistant Regional Commissioner for Processing Center Operations (Philadelphia)
<b>Gasparini, Joanne R.</b>	Deputy Associate Commissioner for Financial Policy and Operations
<b>Glenn, Karen P.</b>	Deputy Chief Actuary (Long-Range)
<b>Goble, Christopher R.</b>	Assistant Associate Commissioner for Disability Operations, OCO
<b>Goss, Stephen C.</b>	Chief Actuary
<b>Gower, Adam C.</b>	Deputy Associate Commissioner for Personnel
<b>Gruber, Theresa L.</b>	Deputy Commissioner for Disability Adjudication and Review
<b>Grzyski, Thomas G.</b>	Assistant Deputy Commissioner for Systems (Systems Operations and Hardware Engineering)
<b>Hairston, Roderick O.</b>	Senior Advisor to the Regional Commissioner (Atlanta)
<b>Haldiman, Sylviane D.</b>	Assistant Deputy Commissioner for Systems (Business Support)
<b>Hall, Frankie B.</b>	Assistant Regional Commissioner for Processing Center Operations (Atlanta)
<b>Hall, Stephanie J.</b>	Senior Advisor to the Deputy Commissioner for Operations
<b>Hansen, Erik T.</b>	

	Associate Commissioner for Legislative Development and Operations
<b>Hickman, Kate D.</b>	Assistant Deputy Commissioner for Budget, Finance, Quality and Management
<b>Hinojosa, Hyacinth G.</b>	Assistant Regional Commissioner for Management & Operations Support (San Francisco)
<b>Horne, Mary L.</b>	Assistant Deputy Commissioner for Operations
<b>Hungerford, Thomas L.</b>	Associate Commissioner for Retirement Policy <b>(N/C)</b>
<b>Jackson, Jean M.</b>	Deputy Associate Commissioner for Disability Systems
<b>Jandrlich, Robert L.</b>	Associate Commissioner for Executive Operations and Human Resources, ODAR
<b>Jonas, Patricia A.</b>	Executive Director, Office of Appellate Operations, ODAR
<b>Jones, Erik N. D.</b>	Assistant Deputy Commissioner for Operations
<b>Julian, James R.</b>	Deputy Associate Commissioner for Facilities and Supply Management
<b>Kerr-Davis, Linda G.</b>	Deputy Regional Commissioner (Kansas City)
<b>Kim, Grace M.</b>	Regional Commissioner (San Francisco)
<b>Kind, Bonnie</b>	Associate Commissioner for Budget
<b>King, Michelle</b>	Deputy Commissioner for Budget, Finance, Quality, and Management
<b>Klopp, Robert</b>	Deputy Commissioner for Systems <b>(N/C)</b>
<b>Koch, Nora R.</b>	Regional Chief Counsel (Philadelphia)
<b>Krabbe, Carla A.</b>	Associate Commissioner for Financial Policy and Operations
<b>Kramer, Michael P.</b>	Regional Commissioner (Kansas City)
<b>Kressman, Eric P.</b>	Deputy Regional Commissioner (Philadelphia)
<b>LaCanfora, Marianna E.</b>	Assistant Deputy Commissioner for Retirement and Disability Policy
<b>Lambert, Kishayra J.</b>	Deputy Associate Commissioner for Systems Operations
<b>Landis, Dean S.</b>	Senior Advisor to the Deputy Commissioner for Disability Adjudication and Review
<b>Lane, H. Alan</b>	Executive Director, Open Government
<b>Lawson, Rona M.</b>	Assistant Inspector General for Audit
<b>Lee, John J.</b>	Regional Chief Counsel (Denver)
<b>Lemon, Wayne</b>	Deputy Associate Commissioner for Benefit Information Systems
<b>Lewandowski, Mary Lisa</b>	Deputy Regional Commissioner (Seattle)
<b>Liu, Andy</b>	General Counsel <b>(N/C)</b>



<b>Lopez, Joe</b>	Deputy Chief of Staff
<b>Lu, Natalie T.</b>	Deputy Associate Commissioner for Retirement Policy
<b>Lytle, Joe</b>	Deputy Associate Commissioner for Budget, Facilities and Security, ODAR
<b>Marshall, Lydia C.</b>	Associate Commissioner for Personnel
<b>Martinez, William M.</b>	Associate Commissioner for IT Programmatic Business Support
<b>Maurin, Frederick M.</b>	Regional Commissioner (New York)
<b>Medley-Proctor, Kristen N.</b>	Executive Director, Office of Strategic Human Capital Management
<b>Min, Royce B.</b>	Assistant Deputy Commissioner for Legislation and Congressional Affairs
<b>Molander, Christopher P.</b>	Associate Commissioner for Facilities and Supply Management
<b>Moncada, Kirsten J.</b>	Executive Director for Privacy and Disclosure
<b>Morado, David F.</b>	Regional Chief Counsel (Seattle)
<b>Morenz, John C.</b>	Chief Technology Officer
<b>Moya, Rafael H.</b>	Associate Commissioner for Anti-Fraud Programs
<b>Owen, John C.</b>	Associate Commissioner for Disability Determinations
<b>Pace, Gregory C.</b>	Senior Advisor to the Deputy Commissioner
<b>Pagan, Robert</b>	Deputy Regional Commissioner (Dallas)
<b>Palmer, J. Jioni</b>	Associate Commissioner for External Affairs <b>(N/C)</b>
<b>Parry, Dan C.</b>	Associate Commissioner for Enterprise Support Architecture and Engineering
<b>Patinella, Ralph A.</b>	Deputy Associate Commissioner for Labor-Management and Employee Relations
<b>Patrick, Steven L.</b>	Associate Commissioner for Public Inquiries
<b>Pelgro, Michael J.</b>	Regional Chief Counsel (Boston)
<b>Phillips, John W.R.</b>	Associate Commissioner for Research, Evaluation and Statistics
<b>Postell, Claudia J.</b>	Deputy Associate Commissioner for Civil Rights and Equal Opportunity
<b>Ray, Gerald K.</b>	Deputy Executive Director, Office of Appellate Operations, ODAR
<b>Reno, Virginia P.</b>	Deputy Commissioner for Retirement and Disability Policy <b>(N/C)</b>
<b>Richardson, Samara A.</b>	Associate Commissioner for Income Security Programs

<b>Rivers, Kenneth H.</b>	Associate Commissioner for Telephone Services
<b>Robert, Ann P.</b>	Assistant Regional Commssioner for Management Operations Support (Chicago)
<b>Robinson, Michael D.</b>	Assistant Inspector General for Investigations
<b>Rodgers, Stacy L.</b>	Chief of Staff ( <b>N/C</b> )
<b>Roland, Van T.</b>	Assistant Regional Commissioner for Management & Operations Support (Philadelphia)
<b>Ross, Jane L.</b>	Senior Policy Advisor
<b>Sabatino, Robin A.</b>	Associate Commissioner for Electronic Services and Technology
<b>Sanders Sparks, C. Michelle</b>	Assistant Regional Commissioner for Processing Center Operations (Kansas City)
<b>Schaeffer, Steven L.</b>	Chief of Staff (OIG)
<b>Schmidt, Kristi A.</b>	Regional Chief Counsel (Kansas City)
<b>Schofield, Jeremiah C.</b>	Deputy Associate Commissioner for Public Service and Operations Support
<b>Shnaider, Anatoly</b>	Deputy Regional Commissioner (Boston)
<b>Siegel, Donna L.</b>	Senior Advisor to the Deputy Commissioner for Budget, Finance, Quality and Management
<b>Simermeyer, John W.</b>	Associate Commissioner for Retirement and Survivors Insurance Systems
<b>Sklar, Glenn E.</b>	Senior Advisor to the General Counsel
<b>Sloan, Mary Ann</b>	Regional Chief Counsel (Atlanta)
<b>Smith, Phyllis M.</b>	Regional Commissioner (Chicago)
<b>Sotaski, Frank</b>	Associate Commissioner for Applications and Supplemental Security Income Systems
<b>Spencer, Melissa S.</b>	Deputy Associate Commissioner for Disability Policy
<b>Stachel, Deborah L.</b>	Regional Chief Counsel (San Francisco)
<b>Stewart, V. Patrice</b>	Deputy Associate Commissioner for Central Operations
<b>Stone, Gale S.</b>	Deputy Inspector General
<b>Stradtman, Terry M.</b>	Regional Commissioner (Philadelphia)
<b>Strauss, Herbert M.</b>	Assistant Deputy Commissioner for Systems/Deputy Chief Information Officer ( <b>N/C</b> )
<b>Teel, Vance N.</b>	Associate Commissioner for International Programs
<b>Thomas, David E.</b>	Associate Commissioner for Hardware Engineering
<b>Thurmond, A. Jacy</b>	Senior Advisor to the Deputy Commissioner for Human Resources

<b>Tracht, Nadine N.</b>	Deputy Associate Commissioner for IT Financial Management and Support
<b>Train, Laura N.</b>	Associate Commissioner for Learning
<b>Waddell, Tina M.</b>	Assistant Deputy Commissioner for Human Resources
<b>Walker, Douglas K.</b>	Deputy Commissioner for Communications <b>(N/C)</b>
<b>Walker, Janet L.</b>	Associate Commissioner for Public Service and Operations Support
<b>Weaver, David A.</b>	Associate Commissioner for Research, Demonstration and Employment Support
<b>Webb, Nancy O.</b>	Associate Commissioner for Electronic Services and Strategic Information, ODAR
<b>Wells, Reginald F.</b>	Deputy Commissioner for Human Resources
<b>Wiggins, Dawn</b>	Deputy Associate Commissioner for Income Security Programs
<b>Wilder, Bryant L.</b>	Deputy Regional Commissioner (New York)
<b>Wilhite, Dennis</b>	Deputy Associate Commissioner for Disability Determinations
<b>Wise, Daryl X.</b>	Associate Commissioner for Quality Improvement

## SES Member Bios

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**Name:** ALMOND, Kojuan L.

**Title:** Associate Commissioner for Civil Rights and Equal Opportunity



### Previous Work History

Dates	Position Title	Organization

### Federal Government Positions

Dates	Position	Location	Series/Grade
09/80 - 11/81	Access COOP Student	SSA/OPNS-Chicago	GS-0099-4/5
11/81 - 08/91	Social Insurance Representative	SSA/OPNS-Chicago	GS-0105-5/7/9/11
08/91 - 09/96	Suppy Social Insurance Specialish	SSA/OPNS-Chicago	GS-1050-11/12
09/96 - 09/98	Systems Coordinator	SSA/OPNS-Chicago	GS-1050-12
09-98 - 01/01	Executive Assistant	SSA/OPNS-Chicago	GS-0343-13
01/01 - 10/09	Regional Recruitment Manager	SSA/OPNS-Chicago	GS-0343-14
10/09 - 10/11	SES Candidate Development Program	SSA/OHR	GS-0301-15
10/11 - 10/12	Acting Assoc Commissioner for External Affairs	SSA/OCOMM/OEA	GS-0301-15
10/12 - 06/14	Assoc Commissioner for External Affairs	SSA/OCOMM/OEA	SES
06/14 -	Assoc Commissioner for Civil Rights and Equal Opportunity	SSA/OHR/OCREO	SES

### Education

College/University	Degree	Year	Course of Study
Michigan State University	B.S.	1981	Pre-Law/Urban Development

### Awards

Type	Year
Commissioner's Citation	2009

Type	Year
SES Performance Bonus	2014
ECSA	2009(2)/200(2)/2007
Quality Step Increase	2009/2003
Performance Award	2012/2011/2010/2009/2008/2006(2)/2005/2002/2000
Deputy Commissioner's Team Award	2006
Deputy Commissioner's Citation	1999
Special Act or Service	2005/2004(2)/2003/1999(2)
Component Head Citation	1999
On the Spot Award	2004/2002

## SES Member Bios

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**Name:** AMRHEIN, Antoinette (Ann) T.

**Title:** Associate Commissioner for Earnings, Enumeration and Administrative Systems



### Previous Work History

Dates	Position Title	Organization
02/89 - 12/90	Software Support Technician	Infosoftware, Inc.
12/90 - 09/92	Tech Support Manager	Infosoftware, Inc.
09/92 - 06/93	Software Release Coordinator	Infosoftware, Inc.
06/93 - 09/94	Business Manager	Infosoftware, Inc.

### Federal Government Positions

Dates	Position	Location	Series/Grade
02/95 - 03/98	IT Specialist	SSA/OS/OTSO	GS-2210-12/13
03/98 - 09/00	IT Specialist (Team Leader)	SSA/OS/OTSO	GS-2210-13
09/00 - 03/03	Branch Chief	SSA/OS/OTSO	GS-2210-14
03/03 - 09/12	Director, Online Sys & Database Opns	SSA/OS/OTSO	GS-2210-15
09/12 - 08/15	Deputy Associate Commissioner	SSA/OS/OEEAS	SES
08/15 -	Associate Commissioner	SSA/OS/OEEAS	SES

### Education

College/University	Degree	Year	Course of Study
Towson University	B.A.	1983	Business Administration
University of Baltimore	M.B.A.	1991	Business Administration

### Awards

Type	Year
SES Performance Bonus	2014/2013
Performance Award	2012/2011/2010/1996

Type	Year
ECSA	2012/2011
Quality Step Increase	2009/2006/1999/1997
Special Act or Service Award	1996

## SES Member Bios

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**Name:** ANDREWS, Diana E.

**Title:** Associate Commissioner for Systems Electronic Services



### Previous Work History

Dates	Position Title	Organization

### Federal Government Positions

Dates	Position	Location	Series/Grade
12/84 - 04/86	Accounting Tech	Dept. of Army	GS-525-4/5
04/86 - 09/88	Computer Assistant	Dept. of Army	GS-335-5/6
09/88 - 09/98	Computer Specialist	SSA/OS/OSDD	GS-334-7/9/11/12/13
10/02 - 05/06	Supvy Computer Specialist	SSA/OS/OSDD	GS-334-14
05/06 - 12/07	Deputy Assoc Commissioner	SSA/OS/ODS	SES Ltd Appt
12/07 - 09/09	Deputy Assoc Commissioner	SSA/OS/ODS	SES
09/09 - 04/10	Associate Commissioner	SSA/OS/ODS	SES
04/10 -	Associate Commissioner	SSA/OS/OSES	SES

### Education

College/University	Degree	Year	Course of Study
Catonsville Community College, Balt County	A.A.	1984	Data Processing
Coppin State College	B.S.	1988	Management Science
University of Baltimore	M.S.	1991	Mgmt Info Systems

### Awards

Type	Year
Presidential Rank Award-Meritorious	2011
Commissioner's Citation	2003



Type	Year
Commissioner's Team Award	2007
SES Performance Bonus	2014/2013/2010/2009/2008
Deputy Commissioner's Citation	2005/2004
Component Head Citation	2003/2002/2000/1999/1998/ 1997/1993/1992/1991/1990
QSI	2004/2001/1995
Performance Award	2003/2002/2000/1999/1998/ 1997/1993/1992/1991/1990
Special Act	1998(2)/1996/1995/1994(2)/ 1993/1992/1990

## SES Member Bios

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**Name:** BALDWIN SPARKS, Kimberly

**Title:** Deputy Associate Commissioner for Electronic  
Services and Technology



### Previous Work History

Dates	Position Title	Organization

### Federal Government Positions

Dates	Position	Location	Series/Grade
07/07 - 09/09	Senior Advisor	SSA/OISP/ORDP	GS-0105-15
10/09 - 07/11	Director	SSA/OCIO	GS-0343-15
07/11 - 09/12	Director	SSA/OPNS/OEST	GS-0343-15
10/12 - 09/16	Dep Assoc Commissioner for Electronic Services and Technology	SSA/OPNS/OEST	GS-0343-15
10/16 -	Deputy Associate Commissioner	SSA/OPNS/OEST	SES

### Education

College/University	Degree	Year	Course of Study
University of Maryland Baltimore County	BA	1991	Mathematics

### Awards

Type	Year
Individual Commissioner's Citation	2010
Team Commissioner's Citation	2013/2000
Deputy Commissioner's Citation	2012/2006
Associate Commissioner's Citation	2008/2006

## SES Member Bios

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**Name:** BARRETT, Christopher J.

**Title:** Associate Commissioner for IT Financial Management and Support



### Previous Work History

Dates	Position Title	Organization

### Federal Government Positions

Dates	Position	Location	Series/Grade
06/92 - 04/95	Provost Marshal, Captain, Military Police Corps	DOD/US Army	
04/95 - 11/96	Company Commander, Captain, Military Police Corps	DOD/US Army	
01/97 - 08/00	Test and Evaluation Officer, Major, Military Police Corps	DOD/US Army	
08/00 - 12/03	Operations Research Analyst	DOD/US Army	NH-1515-04
12/03 - 07/10	Division Chief, Maneuver Ground Evaluation Directorate	DOD/US Army	NH-1515-03
07/10 - 12/13	Deputy Director, Sustainment Evaluation Directorate	DOD/US Army	NH-1515-04
12/13 - 01/15	Deputy Director, Mounted Systems Evaluation Directorate	DOD/US Army	NH-1515-04
01/15 - 12/16	SES CDP Candidate	SSA/ESSS/DCHR	GS-0301-15
12/16 - Present	Associate Commissioner for IT Financial Management and Support	SSA/OS/ITFMS	SES

### Education

College/University	Degree	Year	Course of Study
Rutger's University	B.A.	1988	Economics
Steven's Institute of Technology	M.S.	2014	Systems Design

### Awards

Type	Year

## SES Member Bios

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**Name:** BENNETT, Cynthia R.

**Title:** Associate Commissioner for Customer Service



### Previous Work History

Dates	Position Title	Organization

### Federal Government Positions

Dates	Position	Location	Series/Grade
05/78 - 06/79	Clerk-Typist	HUD	GS-0322-2/3
06/79 - 06/81	Control Clerk	HUD	GS-0301-3/4
06/81 - 06/89	Social Insurance Claims Examiner	SSA/OPNS/OCO-ODO	GS-0993-4/5/7/8/9
06/89 - 12/89	Computer Program Analyst	SSA/OPNS/OCO-ODO	GS-0334-11
12/89 - 06/91	Computer Systems Analyst	SSA/OPNS/ODIO	GS-0334-11
06/91 - 08/91	Computer Systems Analyst	SSA/OPNS/OSR	GS-0334-11
08/91 - 03/92	Computer Systems Analyst	SSA/OS/OSR	GS-0334-11/12
03/92 - 04/98	Computer Specialist	SSA/OS/OSR	GS-0334-12/13
04/98 - 07/01	Lead Computer Specialist	SSA/OS/OSR	GS-0334-13
07/01 - 11/01	Lead Computer Specialist	SSA/OS/OSA	GS-0334-13
11/01 - 07/02	Computer Specialist	SSA/OS/OSES	GS-0334-13/14
07/02 - 10/03	Lead IT Specialist	SSA/OS/OSES	GS-2210-14
10/03 - 10/05	Branch Chief	SSA/OS/OSES	GS-2210-14
10/05 - 07/08	Center Director	SSA/OPNS/OTS	GS-2210-15
07/08 - 08/10	SES Candidate Development Program	SSA/OHR	GS-0301-15
08/10 - 08/13	Center Director	SSA/OPNS/OTS	GS-0343-15
08/13 - 10/16	Deputy Associate Commissioner for Telephone Services	SSA/OPNS/OTS	SES
10/16 -	Associate Commissioner for Customer Service	SSA/OPNS/OCS	SES

**Education**

College/University	Degree	Year	Course of Study
College of Notre Dame	B.A.	1998	Computer Info Systems
Johns Hopkins University	M.B.A.	2001	Management Info Systems

**Awards**

Type	Year
Performance Award	2012/2011/2009/2008/2006/2004/2003/1999/1996
Commissioner's Citation	2007
Exemplary Contribution or Service	2007
Commissioner's Team Citation	2006(2)/2003
Deputy Commissioner's Team Citation	2006/2005
Quality Step Increase	2005
Component Head Team Citation	2005(2)/2002/1999
Component Head Citation	2005/1998
Deputy Commissioner's Citation	2005
On the Spot Award	2004(2)
Special Act or Service Award	2009/2003/2001/1998/1997

## SES Member Bios

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**Name:** BERRYHILL, Nancy A.

**Title:**Deputy Commissioner for Operations



### Previous Work History

Dates	Position Title	Organization

### Federal Government Positions

Dates	Position	Location	Series/Grade
07/75 - 01/78	Claims Clerk	SSA/OPNS-Chicago	GS-2/3/4
01/78 - 02/80	Service Representative	SSA/OPNS-Chicago	GS-5/6
02/80 - 08/84	Social Insurance Representative	SSA/OPNS-Chicago	GS-5/7/9/10
08/84 - 08/88	Supvy Social Insurance Representative	SSA/OPNS-Chicago	GS-11
08/88 - 02/90	Social Insurance Administrator	SSA/OPNS-Chicago	GS-12
02/90 - 02/91	Supvy Social Insurance Specialist	SSA/OPNS-Chicago	GS-13
02/91 - 04/98	Social Insurance Administrator	SSA/OPNS-Chicago	GS-12/13/14
04/98 - 10/03	Area Director	SSA/OPNS-Chicago	GS-15
2001 - 2002	SES Candidate Development Program	SSA/OHR	GS-15
10/03 - 12/05	Deputy Regional Commissioner	SSA/OPNS-Denver	SES
01/06 - 03/11	Regional Commissioner	SSA/OPNS-Denver	SES
03/11 - 08/13	Regional Commissioner	SSA/OPNS-Chicago	SES
08/13 -	Deputy Commissioner for Operations	SSA/OPNS	SES

### Education

College/University	Degree	Year	Course of Study
Control Data Institute	A.A.	1981	Computer Science

### Awards

Type	Year
Presidential Rank Award - Meritorious	2010
Commissioner's Citation	1995
Regional Commissioner's Citation	1998
SES Performance Bonus	2014/2013/2012/2011/2009/2008/2007/2006/2005
Supervisory Excellence Award	1987
Excellence in Service Award	1993
Quality Step Increase	2003/1999/1998/1989/1988/1986
Performance Award	2002/2001/2000/1997/1995/1993/1992/1990/1989
Special Act or Service Award	2000/1996/1995/1994/1990/1987/1984/1982/1977

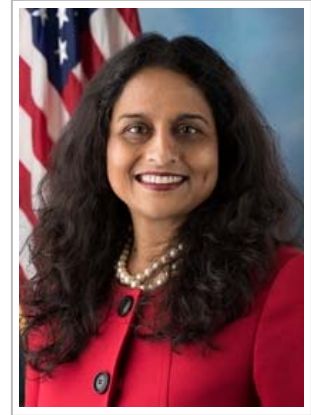
## SES Member Bios

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**Name:** BHARGAVA, Anju P.

**Title:** Senior Advisor to the Deputy Commissioner for Human

**Resources**



### Previous Work History

Dates	Position Title	Organization
1983 - 1998	Vice President	Fleet Financial Group
2000 - 2005	Senior Consultant	IBM Global
2005 - 2006	Vice President	BB&T Bank
2007 - 2008	Management Consultant	Bear Stearns Asset Management
2008 - 2009	Fellow	Rutgers Business School
2009 - 2012	Senior Vice President	Bank of America

### Federal Government Positions

Dates	Position	Location	Series/Grade
2013	Senior Operational Risk Expert	Dept of Treasury	
2014 - 2015	Senior Advisor	CMS	
10/15 - 07/16	Deputy Chief Strategic Officer	SSA/OC SO	SES
07/16 -	Senior Advisor	SSA/OHR	SES

### Education

College/University	Degree	Year	Course of Study
Stella Maris College	B.S.		Biology
Rutgers Graduate School of Business	M.B.A.		

### Awards

Type	Year



## SES Member Bios

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**Name:** BINSTOCK, Seth P.

**Title:** Associate Commissioner for Acquisition and Grants



### Previous Work History

Dates	Position Title	Organization

### Federal Government Positions

Dates	Position	Location	Series/Grade
1989 - 1991	Trial Attorney	GSA	GS-0905-12/13
1991 - 1996	Counsel, Info Tech Service	GSA	GS-0905-14
06/96 - 09/08	General Attorney	SSA/OGC/OGL	GS-0905-14/15
09/08 - 06/12	Deputy Associate Commissioner for Acquisition and Grants	SSA/OBFQM/OAG	SES
06/12 -	Associate Commissioner for Acquisition and Grants	SSA/OBFQM/OAG	SES

### Education

College/University	Degree	Year	Course of Study
Dickinson College	B.A.	1981	International Studies
Howard University School of Law	J.D.	1985	

### Awards

Type	Year
Commissioner's Team Award	2010/2005
SES Performance Bonus	2014/2013/2011/2010
Special Act or Service Award	1998
Performance Award	1998
Quality Step Increase	2005/2003/1997

## SES Member Bios

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**Name:** BIRO, Frank

**Title:**Associate Commissioner for Budget, Facilities and Security



### Previous Work History

Dates	Position Title	Organization

### Federal Government Positions

Dates	Position	Location	Series/Grade
08/90 - 06/91	Systems Accountant	SSA/OCFO	GS-0510-7
06/91 - 01/95	Systems Accountant	SSA/OFAM	GS-0510-7/9/11/12
01/95 - 07/96	Fiscal Mgmt Analyst	SSA/OFAM	GS-0510-13
07/96 - 06/99	Operations Accountant	SSA/OFAM	GS-0510-13
06/99 - 11/00	Lead Accountant	SSA/OFAM	GS-0510-13
11/00 - 10/02	Management Analyst	SSA/OFAM	GS-0343-13
10/02 - 01/05	Executive Officer	SSA/OFAM	GS-0301-14
01/05 - 07/08	Building Mgmt Officer	SSA/OBFM/OFM	GS-1176-15
07/08 - 07/10	SES Candidate Development Program	SSA/OHR	GS-0301-15
07/10 - 02/11	Executive Assistant	SSA/OBFM	GS-0301-15
02/11 - 10/11	Executive Assistant	SSA/OCOMM/OPI	GS-0301-15
10/11 - 01/12	Financial Mgmt Analyst	SSA/OBFM/OFPO	GS-0501-15

Dates 01/12 -	Position Associate Commissioner for Budget, Facilities and Security	Location SSA/ODAR/OBFS	Series/Grade SES
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## Education

College/University	Degree	Year	Course of Study
University of Massachusetts	B.A.	1990	Accounting/Management
University of Baltimore	M.P.A.	1998	Public Administration

## Awards

Type	Year
Commissioner's Team Award	1999
SES Performance Bonus	2014/2013
Deputy Commissioner's Citation	2000
Deputy Commissioner's Team Award	2005
Quality Step Increase	2004/2003/1998
Performance Award	2009/2008/2006(2)/2005/2000
Special Act or Service Award	2004/2003/2002(2)/2001(2)/1999/1998(2)/1997/1996/1995

## SES Member Bios

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**Name:** BLAIR, Jeffrey C.

**Title:** Associate General Counsel for Program Law



### Previous Work History

Dates	Position Title	Organization

### Federal Government Positions

Dates	Position	Location	Series/Grade
09/81 - 06/83	Paralegal Specialist	HHS/OGC-Denver	GS-0950-5/7/9
12/83 - 11/90	Assistant Regional Counsel	HHS/OGC-Denver	GS-0905-9/11/12/13
11/90 - 10/03	Senior Attorney	SSA/OGC/OPL	GS-0905-14/15
10/03 - 02/05	Director, Disability Programs	SSA/OGC/OPL	GS-0905-15
02/05 - 10/07	Director, Titles VIII and XVI Programs	SSA/OGC/OPL	GS-0905-15
10/07 - 05/10	Acting Deputy Associate General Counsel	SSA/OGC/OPL	GS-0905-15
05/10 - 11/11	Deputy Associate General Counsel	SSA/OGC/OPL	SES
11/11 -	Associate General Counsel	SSA/OGC/OPL	SES

### Education

College/University	Degree	Year	Course of Study
Fairfield University	B.A.	1980	History
University of Denver College of Law	J.D.	1983	

### Awards

Type	Year
Commissioner's Citation	1998
Commissioner's Team Award	2006(3)/2000/1998(2)
SES Performance Bonus	2014/2013/2011

Type	Year
General Counsel's Citation	2009/2008
General Counsel's Leadership Excellence Award	2001
General Counsel's Team Award	2006(2)/2005
General Counsel's Quality Service Award	1998
Deputy Commissioner's Citation	1997
Deputy Commissioner's Team Award	2005/1997/1993
Performance Award	2008/2006/2005/2003/2002
Quality Step Increase	2006/2004/1999/1997/1996
Exemplary Contribution or Service Award	2008(2)/2007
Commendable Act or Service Award	2005(2)

## SES Member Bios

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**Name:** BLOYER, Kelly G.

**Title:**Assistant Inspector General for Technology  
and Resource Management



### Previous Work History

Dates	Position Title	Organization

### Federal Government Positions

Dates	Position	Location	Series/Grade
02/91 - 09/93	Social Insurance Representative	SSA/OPNS-Chicago	GS-0105-7/9/10
09/93 - 09/96	Social Insurance Sepcialist	SSA/OPNS-Chicago	GS-0105-11
09/96 - 07/98	Social Insurance Systems Specialist	SSA/OS/OSR	GS-0105-12
07/98 - 09/00	Special Agent	SSA/OIG	GS-1811-7/9/11
09/00 - 05/04	Special Agency	SSA/OIG-Kansas City	GS-1811-11/12/13
05/04 - 06/06	Asst Special Agent in Charge	SSA/OIG-Philadelphia	GS-1811-14
06/06 - 10/09	Special Agent in Charge	SSA/OIG-Kansas City	GS-1811-15
10/09 - 07/11	SES Candidate Development Program	SSA/OHR	GS-0301-15
07/11 - 09/12	Supvy Criminal Investigator	SSA/OIG/OTRM	GS-1811-15
09/12 - 05/14	Deputy Asst Inspector General for Investigations	SSA/OIG/OI	SES
05/14 -	Asst Inspector General for Technology and Resource Mgmt	SSA/OIG/OTRM	SES

### Education

College/University	Degree	Year	Course of Study
University of Wisconsin	B.S.	1990	Criminal Justice/Psychology

### Awards

Type	Year

Type	Year
Commissioner's Citation	2003
Performance Award	2011/2010/2009/2008/2006/2005
Exemplary Contribution or Service Award	2011/2009
Special Act or Service Award	2005/2003

## SES Member Bios

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**Name:** BOGLE, Darlynda K.

**Title:**Executive Secretary



### Previous Work History

Dates	Position Title	Organization
09/84 - 10/85	Trial Attorney	Betts, Patterson and Mines, P.S.
10/85 - 02/87	Trial Attorney	Brown-Mathews

### Federal Government Positions

Dates	Position	Location	Series/Grade
05/89 - 11/91	Trial Attorney	SSA/OGC	GS-0905-12/13
11/91 - 05/98	Attorney Advisor	SSA/OP	GS-0905-13
05/98 - 01/03	Senior Project Manager	SSA/OC	GS-0343-14/15
01/03 - 07/03	Senior Project Manager	SSA/OCSCO/OSM	GS-0343-15
07/03 - 11/03	Acting Deputy Associate Commissioner	SSA/OCOMM/OCPT	GS-0340-15
11/03 - 04/04	Senior Advisor	SSA/OCOMM	GS-1035-15
04/04 - 03/06	Deputy Associate Commissioner	SSA/OCOMM/OCPT	GS-0340-15
03/06 - 08/07	SES Candidate Development Program	SSA/OHR	GS-0301-15
08/07 - 03/10	Deputy Associate Commissioner	SSA/OCOMM/OCPT	GS-0340-15
03/10 - 03/11	Management Analyst	SSA/OCIO	GS-0343-15
03/11 - 05/13	Division Director	SSA/OCOMM/OOG	GS-0343-15
05/13 - 09/13	Acting Assistant Deputy Commissioner	SSA/OCOMM	GS-0301-15
09/13 - 07/15	Deputy Chief Strategic Officer	SSA/OCSCO	SES
07/15 -	Executive Secretary	SSA/OC	SES

### Education

College/University	Degree	Year	Course of Study
University of Michigan	B.A.	1981	French



College/University	Degree	Year	Course of Study
University of Michigan Law School	J.D.	1984	

## Awards

Type	Year
SES Performance Bonus	2014
Performance Award	2012/2011/2010/2009/1998/1997/1996/1992
Special Act or Service Award	1995/1994/1992/1991
Quality Step Increase	1995/1993
Exemplary Act or Service Award	2010

## SES Member Bios

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**Name:** BORLAND, James C.

**Title:**Assistant Deputy Commissioner for Communications



### Previous Work History

Dates	Position Title	Organization

### Federal Government Positions

Dates	Position	Location	Series/Grade
09/84 - 11/85	Management Analyst	Dept of Education	GS-7
11/85 - 03/86	Certification Specialist	Dept of Education	GS-9
03/86 - 05/86	Program Specialist	Dept of Education	GS-9
05/86 - 05/87	Certification Specialist	Dept of Education	GS-9/11
05/87 - 09/88	Management Analyst	Dept of Education	GS-11/12
09/88 - 08/89	Computer Systems Analyst	Dept of Education	GS-12
08/89 - 05/97	Computer Specialist	Dept of Agriculture	GS-13/14
05/97 - 07/00	Supvy Public Affairs Specialist	Dept of Agriculture	GS-15
07/00 - 04/02	Public Affairs Specialist	SSA/OCOMM	GS-15
04/02 - 04/04	Deputy Associate Commissioner	SSA/OCOMM/OCPT	GS-15
04/04 - 05/05	IT Specialist	SSA/OS/OTSO	GS-15
05/05 - 06/08	Deputy Associate Commissioner	SSA/OS/OESAE	SES
06/08 - 03/09	Deputy Associate Commissioner	SSA/OPNS/OES	SES
03/09 - 04/10	Special Advisor for Health IT	SSA/OC	SES
04/10 - 01/11	Associate Commissioner	SSA/ODAR/OESSI	SES
01/11 - 08/15	Assistant Deputy Commissioner	SSA/ODAR	SES
08/15 -	Assistant Deputy Commissioner	SSA/OCOMM	SES

### Education

College/University	Degree	Year	Course of Study
Towson State University	B.S.	1984	Political Science

## Awards

Type	Year
Commissioner's Team Award	2007/2002/2001
Deputy Commissioner's Citation	2001
Quality Step Increase	1988
SES Performance Bonus	2014/2013/2011/2010/2009/2008
Performance Award	2005/2001/1995/1993/1991/1990
Special Act or Service Award	2002/1995/1994/1992/1991/1990
On the Spot Award	2002

## SES Member Bios

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**Name:** BOSTICK BORDEN, Vera E.

**Title:**Associate Commissioner for Quality Review



### Previous Work History

Dates	Position Title	Organization

### Federal Government Positions

Dates	Position	Location	Series/Grade
10/83 - 01/88	Social Insurance Representative	SSA/OPNS-NY	GS-0105-5/7/9/10
01/88 - 01/91	Supvy Social Insurance Representative	SSA/OPNS-NY	GS-0105-11
01/91 - 05/98	Social Insurance Representative	SSA/OPNS-NY	GS-0105-11/12
05/98 - 09/98	NY Career Enrichment Participant	SSA/OPNS-NY	GS-0301-13
09/98 - 10/98	Area Administrative Assistant	SSA/OPNS-NY	GS-0105-12
10/98 - 08/00	Lead Social Insurance Specialist	SSA/OPNS-NY	GS-0105-13
08/00 - 06/06	Center Director, Disability	SSA/OPNS-NY	GS-0105-14/15
06/06 - 07/10	NY Field Site Director	SSA/OQP-NY	GS-0105-15
07/10 - 07/12	SES Candidate Development Program	SSA/OHR	GS-0301-15
07/12 - 06/13	NY Field Site Director	SSA/OQP-NY	GS-0105-15
06/13 - 07/16	Deputy Associate Commissioner	SSA/OBFQM/OQR	SES
07/16 -	Associate Commissioner	SSA/OBFQM/OQR	SES

### Education

College/University	Degree	Year	Course of Study
Long Island University	B.A.	1981	

### Awards

Type	Year

Type	Year
Commissioner's Team Award	2006
SES Performance Bonus	2014
Quality Step Increase	2008/2004/2000
Performance Award	2010/2009/2006(2)/2005/2003/2002
On the Spot Award	2003

## SES Member Bios

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**Name:** BOWLES, Bernard C.

**Title:** Assistant Regional Commissioner for Processing Center  
Operations, New York



### Previous Work History

Dates	Position Title	Organization

### Federal Government Positions

Dates	Position	Location	Series/Grade
06/75 - 07/79	Claims Authorizer	SSA/OPNS-New York	GS-0993-07/09/10
07/79 - 07/83	Assistant Module Manager	SSA/OPNS-New York	GS-0993-11
07/83 - 01/85	Module Manager	SSA/OPNS-New York	GS-0993-12
02/85 - 12/86	Deputy Section Manager	SSA/OPNS-New York	GS-0993-12
12/86 - 03/91	Program Analysis Officer	SSA/OPNS-New York	GS-0345-13/14
03/91 - 06/96	Chief, Operations Analysis Section	SSA/OPNS-New York	GS-0345-13
06/96 - 12/96	Operations Manager	SSA/OPNS-New York	GS-0301-14
12/96 - 02/03	Deputy ARPCO	SSA/OPNS-New York	GS-0105-14
02/03 - 08/16	Executive Officer	SSA/OPNS-New York	GS-15-0105-15
08/16 -	ARPCO	SSA/OPNS-New York	SES

### Education

College/University	Degree	Year	Course of Study
Manhattan College	B.A.	1974	Psychology

### Awards

Type	Year
Commissioner's Citation	2004/1992
Regional Commissioner's Citation	2001
Deputy Commissioner's Citation	1994
Supervisory Excellence Award	1990
Associate Commissioner's Citation	1985
Recognition of Contribution	2015/2014/2012/2011/2010/2009/2008/2006/2005/2001
Quality Step Increase	2004/2002/2000

## SES Member Bios

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**Name:** BOWLES, Howard E.

**Position of Record:** Assistant Regional Commissioner for  
Management and Operations Support, Atlanta



### Previous Work History

Dates	Position Title	Organization

### Federal Government Positions

Dates	Position	Location	Series/Grade
07/91 - 05/93	Contact Representative	SSA.OPNS-Atlanta	GS-0962-5/6
05/93 - 05/97	Social Insurance Representative	SSA.OPNS-Atlanta	GS-0105-7/9/11
05/97 - 03/00	Systems Coordinator	SSA.OPNS-Atlanta	GS-0105-12
03/00 - 04/02	Regional Leadership Development Program	SSA.OPNS-Atlanta	GS-0301-12/13
04/02 - 09/02	Assistant District Manager	SSA.OPNS-Atlanta	GS-0105-13
09/02 - 01/09	District Manager	SSA.OPNS-Atlanta	GS-0105-13/14
01/09 - 10/13	Area Director	SSA/OPNS-Denver	GS-0105-15
10/13 - 01/15	Area Director	SSA.OPNS-Atlanta	GS-0105-15
01/15 - 07/16	SES CDP Candidate Development Program	SSA/OHR	GS-0301-15
07/16 -	ARCMOS	SSA/OPNS-Atlanta	SES

### Education

College/University	Degree	Year	Course of Study

### Awards

Type	Year
Performance Award	2015/2014/2012/2011/2009
Exemplary Contribution or Service Award	2014/2012/2010



Type	Year
Deputy Commissioner Citation	2013/2011/2007/1996
Quality Step Increase	2008
Regional Commissioner Citation	2007
Special Act or Service Award	1995

## SES Member Bios

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**Name:** BREEN, Stephen J.

**Title:** Deputy Regional Commissioner, San Francisco



### Previous Work History

Dates	Position Title	Organization

### Federal Government Positions

Dates	Position	Location	Series/Grade
10/74 - 02/78	Claims Authorizer	SSA/OPNS-San Fran	GS-7/9/10
02/78 - 02/80	Assistant Module Manager	SSA/OPNS-San Fran	GS-11
02/80 - 01/81	Module Manager	SSA/OPNS-San Fran	GS-12
01/81 - 06/82	Supvy Social Insurance Claims Examiner	SSA/OPNS-San Fran	GS-12
06/82 - 02/84	Management Development Program	SSA/OPNS-San Fran	GS-12
02/84 - 05/85	Supvy Social Insurance Claims Examiner	SSA/OPNS-San Fran	GS-13
05/85 - 10/86	Section Manager	SSA/OPNS-San Fran	GS-13
10/86 - 08/87	Social Insurance Advisor	SSA/OPNS-San Fran	GS-13
08/87 - 10/91	Branch Manager	SSA/OPNS-San Fran	GS-14
10/91 - 12/91	Deputy to the Assistant Regional Commissioner for Field Operations	SSA/OPNS-San Fran	GS-14
12/91 - 01/00	District Manager	SSA/OPNS-San Fran	GS-14
01/00 - 01/04	ARCPCO	SSA/OPNS-San Fran	GS-15
01/04 - 05/10	ARCPCO	SSA/OPNS-San Fran	SES
05/10 - 04/13	ARCMOS	SSA/OPNS-San Fran	SES
04/13 -	Deputy Regional Commissioner	SSA/OPNS-San Fran	SES

### Education

College/University	Degree	Year	Course of Study
California State University	B.A.		Government

College/University	Degree	Year	Course of Study
California State University	M.P.A.	1989	

## Awards

Type	Year
SES Performance Bonus	2014/2013/2010/2009/2008/2007/2006/2005
Quality Step Increase	2003/2002/1981/1979/1977
Special Act or Service Award	2002(2)/2001/1998(2)/1996/1995(3)/1994
Performance Award	1999/1993/1992/1991/1990/1989/1988(2)/1987/1986
Regional Commissioner's Citation	2001/1991
Deputy Commissioner's Citation	1998
On the Spot Award	2003

## SES Member Bios

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**Name:** BRUNE, Sean P.

**Title:** Assistant Deputy Commissioner for Budget, Finance,  
Quality and Management



### Previous Work History

Dates	Position Title	Organization
06/95 - 06/98	Program Director	The Choice Program
06/98 - 09/99	Public Policy Research Director	Advocates for Children and Youth, Inc.

### Federal Government Positions

Dates	Position	Location	Series/Grade
08/99 - 08/01	Presidential Management Intern	SSA	GS-0301-09/11
08/01 - 02/03	Program Analyst	SSA/OPNS/OES	GS-0343-12/13
02/03 - 11/03	Executive Assistant	SSA/OPNS	GS-0343-13
11/03 - 05/05	Project Manager	SSA/OPNS	GS-0343-14
05/05 - 09/08	Deputy Associate Commissioner	SSA/OPNS/OES	GS-0343-15
09/08 - 09/08	Associate Commissioner	SSA/OPNS/OES	SES
09/08 - 07/10	Associate Commissioner	SSA/OLCA/OLD	SES
07/10 - 03/11	Deputy Regional Commissioner	SSA/OPNS-Denver	SES
03/11 - 02/15	Regional Commissioner	SSA/OPNS-Denver	SES
02/15 - 09/16	Senior Advisor	SSA/OBFQM	SES
09/16 -	Assistant Deputy Commissioner	SSA/OBFQM	SES

### Education

College/University	Degree	Year	Course of Study
Bucknell University	B.A.	1990	English
University of Baltimore	M.B.A.	1999	

### Awards

Type	Year
Commissioner's Citation	2004
SES Performance Bonus	2014/2013/2011/2010/2009
Quality Step Increase	2008/2006
Deputy Commissioner's Citation	2007

## SES Member Bios

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**Name:** BUEHLER, Rose Mary

**Title:** Regional Commissioner, Atlanta



### Previous Work History

Dates	Position Title	Organization

### Federal Government Positions

Dates	Position	Location	Series/Grade
07/90 - 09/93	Claims Representative	SSA/OPNS-Atlanta	GS-0105-7/9/10
09/93 - 08/98	Social Insurance Specialist	SSA/OPNS-Atlanta	GS-0105-11
08/98 - 10/99	Mgmt Support Specialist	SSA/OPNS-Atlanta	GS-0105-12
10/99 - 09/00	Operations Supervisor	SSA/OPNS-Atlanta	GS-0105-12
09/00 - 09/01	Mgmt Development Program	SSA/OPNS-Atlanta	GS-0343-13
09/01 - 09/02	Area Operations Analyst	SSA/OPNS-Atlanta	GS-0105-12
09/02 - 05/03	Assistant District Manager	SSA/OPNS-Atlanta	GS-0105-13
05/03 - 09/04	District Manager	SSA/OPNS-Atlanta	GS-0105-14
09/04 - 01/07	Deputy Area Director	SSA/OPNS-Atlanta	GS-0105-14
01/07 - 06/07	Advanced Leadership Program	SSA/OHR	GS-0301-15
06/07 - 12/09	Area Director	SSA/OPNS-Atlanta	GS-0105-15
01/10 - 10/11	SES Candidate Development Program	SSA/OHR	GS-0301-15
10/11 - 05/12	Acting ARPCO	SSA/OPNS-Atlanta	GS-0105-15
05/12 - 12/16	ARPCO	SSA/OPNS-Atlanta	SES
12/16 -	Regional Commissioner	SSA?OPNS-Altanta	SES

### Education

College/University	Degree	Year	Course of Study
Mississippi College	B.S.	1990	Business Administration

**Awards**

Type	Year
Quality Step Increase	2006/2002
SES Performance Bonus	2014
Performance Award	2011/2010/2009/2008/2006/2005/2004/2003/2000/1996/1993
Special Act or Service Award	2004/1997(2)/1996/1995/1993

## SES Member Bios

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**Name:** BURRELL, Ruby D.

**Title:** Chief Strategic Officer



### Previous Work History

Dates	Position Title	Organization

### Federal Government Positions

Dates	Position	Location	Series/Grade
05/74 - 05/75	ACCESS (COOP) Student	SSA/OPNS-Philadelphia	GS-4/5
05/75 - 03/79	Claims Representative	SSA/OPNS-Philadelphia	GS-5/7/9/10
03/79 - 02/81	Operations Supervisor	SSA/OPNS-Philadelphia	GS-10/11
02/81 - 12/83	Branch Manager	SSA/OPNS-Philadelphia	GS-12
12/83 - 11/88	Area Administrative Assistant	SSA/OPNS-Philadelphia	GS-12
11/88 - 05/92	Assistant District Manager	SSA/OPNS-Philadelphia	GS-13
05/92 - 09/96	District Manager	SSA/OPNS-Philadelphia	GS-14
09/96 - 10/02	Area Director	SSA/OPNS-Philadelphia	GS-15
10/02 - 01/06	Deputy Associate Commissioner	SSA/OPNS/OPSOS	SES
01/06 - 12/10	Associate Commissioner	SSA/OPNS/ODD	SES
12/10 - 04/13	Associate Commissioner for Field Site Operations	SSA/OQP	SES
04/13 -	Chief Strategic Officer	SSA/OC SO	SES

### Education

College/University	Degree	Year	Course of Study
Virginia State University	B.A.	1975	Psychology

### Awards



Type	Year
Commissioner's Citation	2001/1994
Commissioner's Team Award	2004
SES Performance Bonus	2014/2013/2010/2009/2008/2007/2006/2005/2004
Regional Commissioner's Citation	1993
Regional Director's Citation	1992
Equal Opportunity Achievement Award	1995
Quality Step Increase	1998
Performance Award	2003/2002/2001/2000/1999/1996/1994/1993/1992
Special Act or Service Award	1997/1995/1994(2)/1993/1991/1990(2)

## SES Member Bios

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**Name:** BYRD, Kimberly A.

**Title:** Deputy Assistant Inspector General for Audits  
(Financial Systems and Operations Audits)



### Previous Work History

Dates	Position Title	Organization

### Federal Government Positions

Dates	Position	Location	Series/Grade
07/87 - 03/91	Evaluator	GAO	GS-0510-7/9/11
03/91 - 12/95	Auditor	RTC/OIG	GS-0511-12/13
12/95 - 03/97	Audit Specialist	FDIC/OIG	GS-0511-13
03/97 - 02/99	Senior Auditor	SSA/OIG/OA	GS-0511-13
02/99 - 11/01	Audit Manager	SSA/OIG/OA	GS-0511-14
11/01 - 11/13	Audit Director	SSA/OIG/OA	GS-0511-15
11/13 -	Deputy Assistant Inspector General	SSA/OIG/OA	SES

### Education

College/University	Degree	Year	Course of Study
Berry College	B.S.		Accounting/Business Law

### Awards

Type	Year
Commissioner's Citation	2013
Performance Award	2012/2011/2010/2009/1995/1993/1990/1989
Special Act or Service Award	2011/2010/1996
Quality Step Increase	2006/2003/2000
Inspector General Award	2006/2005

Type	Year
Award for Excellence, CIGIE	2007/2006/2001

## SES Member Bios

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**Name:** CALDWELL, Kathryn A.

**Title:** Regional Chief Counsel, Chicago



### Previous Work History

Dates	Position Title	Organization

### Federal Government Positions

Dates	Position	Location	Series/Grade
08/97 - 08/05	Attorney	SSA/OGC-Chicago	GS-0905-11/12/13/14
08/05 - 02/13	Supvy Attorney	SSA/OGC-Chicago	GS-0905-15
02/13 - 08/16	Deputy Regional Chief Counsel	SSA/OGC-Chicago	GS-0905-15
08/16 -	Regional Chief Counsel	SSA/OGC-Chicago	SES

### Education

College/University	Degree	Year	Course of Study
George Washington University	B.A.	1994	Journalism
University of Virginia Law School	J.D.	1997	

### Awards

Type	Year
General Counsel's Citation	2004
Excellence in Service Award	2003
Recognition of Contribution Award	2014/2012/2011/2010/2009/2008/2006/2004/2003/2002/2001

## SES Member Bios

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**Name:** CALLAHAN, Daniel F.

**Title:** Deputy General Counsel



### Previous Work History

Dates	Position Title	Organization

### Federal Government Positions

Dates	Position	Location	Series/Grade
09/91 - 12/91	Law Clerk	SSA/OGC	GS-0904-11
12/91 - 12/95	Attorney Advisor	SSA/OGC	GS-0905-11/12/13
12/95 - 11/00	General Attorney	SSA/OGC	GS-0905-13/14
11/00 - 10/09	Attorney	SSA/OGC	GS-0905-15
10/09 - 10/11	SES Candidate Development Program	SSA/OHR	GS-0905-15
10/11 - 06/12	Acting Executive Director	SSA/OGC/OPD	GS-0905-15
06/12 - 01/13	Acting Deputy Associate General Counsel	SSA/OGC/OGL	GS-0905-15
01/13 - 11/15	Deputy Associate General Counsel	SSA/OGC/OGL	SES
11/15 -	Deputy General Counsel	SSA/OGC	SES

### Education

College/University	Degree	Year	Course of Study
Syracuse University	B.A.	1988	Political Science
Syracuse University	M.P.A.	1991	Public Administration
Syracuse University	J.D.	1991	

### Awards

Type	Year
SES Performance Bonus	2014

Type	Year
Deputy Commissioner's Citation	2006
Deputy Commissioner's Team Award	2008
Component Head Team Award	2009
Performance Award	2012/2010/2009/2008/2006/2004/2001/2000/1998/1996
Exemplary Contribution or Service Award	2012/2009(2)/2008/2007
Quality Step Increase	2011/2005/1999
Special Act or Contribution	2006/2005/2003/2002/1997

## SES Member Bios

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**Name:** CALVERT, Donna L.

**Title:** Assistant Deputy Commissioner for Disability Adjudication  
and Review



### Previous Work History

Dates	Position Title	Organization
05/83 - 10/83	Law Clerk	
01/85 - 12/85	Law Clerk	

### Federal Government Positions

Dates	Position	Location	Series/Grade
10/83 - 01/85	Paralegal Specialist	HHS/OGC-Chicago	GS-5/7
01/85 - 11/93	General Attorney	HHS/OGC-Chicago	GS-9/11/12/13
11/93 - 05/04	Supvy General Attorney	HHS/OGC-Chicago	GS-14/15
05/04 - 12/06	Regional Chief Counsel	SSA/OGC-Philadelphia	SES
12/06 - 06/14	Regional Chief Counsel	SSA/OGC-Chicago	SES
06/14 - 08/15	Regional Chief Counsel	SSA/OGC-San Francisco	SES
08/15 -	Assistant Deputy Commissioner	SSA/ODAR	SES

### Education

College/University	Degree	Year	Course of Study
University of Iowa	B.A.	1982	English
DePaul University	J.D.	1985	

### Awards

Type	Year
Commissioner's Citation	1999
Commissioner's Team Award	2000

Type	Year
SES Performance Bonus	2014/2013/2011/2010/2009/2008/2007/2006
Quality Step Increase	2002/1999
Performance Award	2004/2003/2000/1998/1996/1995
Special Act or Service Award	2003/2002/2001/1997
On the Spot Award	2003/2002
Supervisory Excellence Award	1996
Leadership Excellence Award	2004
General Counsel's Special Award	2000
Quality Service Award	2000
Hammer Award	1998



## SES Member Bios

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**Name:** CARDONA, Delma I.

**Title:** Deputy Associate Commissioner for Customer Service



### Previous Work History

Dates	Position Title	Organization

### Federal Government Positions

Dates	Position	Location	Series/Grade
09/99 - 11-03	Claims Representative (Bilingual)	SSA/OPNS-Phila	GS-0105-5/7/9/11
11/03 - 03/04	Staff Associate	SSA/OPNS-Phila	GS-0301-12
03/04 - 01/05	Managerial Associate Intern	SSA/OPNS-Phila	GS-0301-12/13
01/05 - 10/06	Supv. Social Insurance Specialist	SSA/OPNS-Phila	GS-0105-13
10/06 - 03/07	District Manager	SSA/OPNS-Phila	GS-0105-13
03/07 - 06/07	Supv. Social Insurance Specialist	SSA/OPNS-Phila	GS-0105-13
06/07 - 04/08	District Manager	SSA/OPNS-Phila	GS-0105-13
04/08 - 04/09	Supv. Social Insurance Specialist	SSA/OPNS-Phila	GS-0105-13
04/09 - 09/09	Deputy Area Director	SSA/OPNS-Phila	GS-0105-14
08/09 - 11/11	Deputy Division Director	SSA/OPNS/OAS	GS-0343-14
11/11 - 10/13	Division Director	SSA/OPNS/OAS	GS-0904-14
10/13 - 01/15	Division Director	SSA/OPNS/OEST	GS-0905-15
01/15 - 11/16	SES Candidate Development Program	SSA/DCHR	GS-0905-15
11/16 -	Deputy Associate Commissioner	SSA/OPNS/OCS	SES

### Education

College/University	Degree	Year	Course of Study
University of Puerto Rico	B.A.	1999	

### **Awards**

Type	Year
Recognition of Contribution	2015/2011/2009
Quality Step Increase	2014/2006
Exemplary Contribution or Service Award	2012/2011/2010
Performance Award	2009

## SES Member Bios

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**Name:** CHESSER, Judy L.

**Title:** Deputy Commissioner for Legislation and Congressional Affairs (N/C)



### Previous Work History

Dates	Position Title	Organization
06/75 - 08/75	Legal Assistant	United Auto Workers
10/75 - 05/76	Legal Researcher	Law Department, Boston, MA
04/81 - 04/84	Legislative Representative	New York City
04/84 - 02/94	Director, Washington Office	New York City
01/98 - 06/98	Adjunct Professor	City University of New York Law School
04/01 - 06/02	Counsel, Director of Public Policy	United Cerebral Palsy Associations
06/02 - 03/07	Director, Washington Office	New York City
03/07 - 10/09	Director	NYC Health and Hospitals Corporation

### Federal Government Positions

Dates	Position	Location	Series/Grade
07/76 - 09/76	Paralegal Specialist	Dept of Justice	GS-7
06/77 - 08/77	Staff Assistant	US House of Reps	
10/77 - 02/78	Law Clerk	SEC/OGC	GS-11
02/78 - 05/79	General Attorney	SEC/OGC	GS-11/12
05/79 - 09/79	Attorney Advisor	HUD	GS-12
10/79 - 03/80	Asst for Congressional Relations	HUD	GS-13
03/80 - 11/80	Congressional Liaison Specialist	HHS	GS-13
11/80 - 02/81	Special Asst to Asst Secretary for Legislation	HHS	GS-14
06/94 - 07/94	Consultant	SSA	
07/94 - 05/95	Associate Commissioner for Legislation and Congressional Affairs	SSA/OLCA	SES
05/95 - 04/01	Deputy Commissioner for Legislation and Congressional Affairs	SSA/OLCA	SES

Dates	Position	Location	Series/Grade
10/09 - 03/10	Deputy Commissioner for Legislative and Regulatory Affairs	SSA/OLRA	SES
11/14 -	Deputy Commissioner for Legislation and Congressional Affairs	SSA/OLCA	SES

## Education

College/University	Degree	Year	Course of Study
Syracuse University	B.A.	1970	
American University	M.A.	1972	
Boston College	J.D.	1977	

## Awards

Type	Year

## SES Member Bios

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**Name:** CHILDRESS, Rob A.

**Title:** Deputy Asistant Inspector General for Investations  
(Eastern Field Operations)



### Previous Work History

Dates	Position Title	Organization

### Federal Government Positions

Dates	Position	Location	Series/Grade
06/88 - 08/94	U.S. Customs Inspector	US Customs Service	GS-1890-09
08/94 - 08/96	Special Agent	HHS/OIG/OI	GS-1811-11
08/96 - 05/00	Special Agent	SSA/OIG/OI	GS-1811-12/13
05/00 - 08/07	Resident Agent in Charge	SSA/OIG/OI	GS-1811-14
08/07 - 06/10	Special Agent in Charge	SSA/OIG/OI-Dallas	GS-1811-15
06/10 - 04/14	Special Agent in Charge	SSA/OIG	GS-1811-15
04/14 -	Deputy Asst Inspector General for Investigations	SSA/OIG/OI	SES

### Education

College/University	Degree	Year	Course of Study
Old Dominion University	B.A.	1988	Criminal Justice

### Awards

Type	Year
Regional Commissioner's Citation	2009
Deputy Commissioner's Citation	2008
Performance Award	2009/2006/2005/2004/2003/2002/2000/1999/1997
Quality Step Increase	1993
Individual Cash Award	2012/2011/2010(2)

Type	Year
Exemplary Contribution or Service Award	2009

## SES Member Bios

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**Name:** CHITWOOD, Mitchell R.

**Title:** Associate General Counsel for General Law



### Previous Work History

Dates	Position Title	Organization

### Federal Government Positions

Dates	Position	Location	Series/Grade
08/90 - 10/91	Judge Advocate	US Army	
10/91 - 02/93	Senior Defense Counsel	US Army	
02/93 - 03/96	Trial Attorney	US Army	
03/96 - 04/97	Trial Attorney	Dept of Justice	GS-0905-13
04/97 - 01/03	General Attorney	Dept of Justice	GS-0905-14/15
01/03 - 12/12	Asst Chief, Dallas Field Office	Dept of Justice	GS-0905-15
12/12 - 01/13	Supvy Attorney	SSA/OGC/OGL	GS-0905-15
01/13 -	Associate General Counsel	SSA/OGC/OGL	SES

### Education

College/University	Degree	Year	Course of Study
Georgetown University	B.S.F.S	1985	International Politics
University of Utah College of Law	J.D.	1988	
US Army War College	M.S.S.	2007	Strategic Studies

### Awards

Type	Year
SES Performance Bonus	2014
U.S. Attorney General's Award for Distinguished Service	2000

Type	Year
Judge Advocates Association - Outstandding Career Armed Services Attorney Award	2007
Performance Award	1998



## SES Member Bios

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**Name:** CLEMONS, Gina P.

**Title:** Associate Commissioner for Disability Policy



### Previous Work History

Dates	Position Title	Organization
09/88 - 03/90	Research Coordinator/Faculty	University of Maryland Dental School
03/90 - 01/91	Provider Relations Specialist	Dental Management Corporation
01/91 - 03/94	Manager, Provider Relations	Dental Management Corporation
03/94 - 09/94	National Director, Provider Relations	Dental Benefit Providers, Inc.

### Federal Government Positions

Dates	Position	Location	Series/Grade
07/85 - 12/87	Active Duty	U.S. Army	
09/94 - 04/98	Social Science Research Analyst	DHHS/HCFA	GS-0101-12/13
04/98 - 12/00	Health Insurance Specialist	DHHS/HCFA	GS-0107-13/14
12/00 - 02/01	Supvy Health Insurance Specialist	DHHS/HCFA	GS-0107-15
02/01 - 10/03	Health Insurance Specialist	DHHS/HCFA	GS-0107-14
10/03 - 03/04	Supvy Health Insurance Specialist	DHHS/CMS	GS-0107-15
03/04 - 09/07	Health Insurance Specialist	DHHS/CMS	GS-0107-14/15
09/07 - 08/10	Supvy Writer-Editor	VA/ORD	GS-1082-14
08/10 - 12/11	Communications Director	VA/ORD	GS-0340-15
01/12 - 01/14	SES Candidate Development Program	SSA/OHR	GS-0301-15
01/14 - 11/14	Acting Associate Commissioner	SSA/ORDP/ODP	GS-0105-15
11/14 -	Associate Commissioner	SSA/ORDP/ODP	SES

### Education

College/University	Degree	Year	Course of Study
University of Maryland Dental School	B.S.	1989	Dental Hygiene

College/University	Degree	Year	Course of Study
University of Maryland University College	M.A.	1991	Administration/Health Care

## Awards

Type	Year
Veterans Health Administration Communicator of the Year	2011
Individual Cash Award	2014/2011(3)/2010/2009/2008(2)
HHS Secretary's Employee of the Month	1999
Performance Award	2014/2011/2010/2009
HHS Secretary's Award for Distinguished Service	2009/2004/2002/2001/1998
CMS Administrator's Achievement Award	1997/1996
Quality Step Increase	2001
Administrator's Certificate of Appreciation	1997
Director's Citations	2007/2005/2004/2002/2001(2)
Special Act or Service Award	2011/2010/2009/2006(3)/2005(2)/2004/2003/ 2002/2001/2000/1999/1998/1997
Bronze Telly Award	2001/2010(5)

## SES Member Bios

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**Name:** COLON-MOLLFULLEDA, Wanda

**Title:**Deputy Regional Commissioner, Denver



### Previous Work History

Dates	Position Title	Organization

### Federal Government Positions

Dates	Position	Location	Series/Grade
08/94 - 09/97	Social Insurance Specialist	SSA/OPNS-Chicago	GS-0105-7/9/11
10/97 - 10/98	Public Affairs Specialist	SSA/OPNS-Chicago	GS-1035-11/12
10/98 - 10/99	Operations Leadership Development Program	SSA/OPNS-Chicago	GS-0301-12/13
10/99 - 11/99	Public Affairs Specialist	SSA/OPNS-Chicago	GS-0105-12
11/99 - 10/01	District Manager	SSA/OPNS-Chicago	GS-0105-13
10/01 - 05/03	Advanced Leadership Program	SSA/OPNS-Chicago	GS-0301-13/14
05/03 - 02/07	District Manager	SSA/OPNS-Chicago	GS-0105-13/14
02/07 - 07/08	Deputy Area Director	SSA/OPNS-Chicago	GS-0105-14
07/08 - 07/10	SES Candidate Development Program	SSA/OHR	GS-0301-15
07/10 - 01/12	Deputy ARCMOS	SSA/OPNS-Kansas City	GS-0105-15
01/12 -	Deputy Regional Commissioner	SSA/OPNS-Denver	SES

### Education

College/University	Degree	Year	Course of Study
University of Puerto Rice	B.A.	1990	Psychology
University of Akron	M.A.	1992	Public Administration
University of Akron	Ph.D.	2008	Urban Studies and Public Affairs

### Awards

Type	Year
SES Performance Bonus	2014
Performance Award	2009/2006(2)
Quality Step Increase	2008/2005
Exemplary Contribution or Service Award	2007
Component Head Citation	2005
Individual Special Act or Service Award	2004/2003/2002/2001
Special Act	2000

## SES Member Bios

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**Name:** CONTE, Stephen P.

**Title:** Regional Chief Counsel, New York



### Previous Work History

Dates	Position Title	Organization
1976 - 1977	Teacher	St. Francis DeChantal Elementary School

### Federal Government Positions

Dates	Position	Location	Series/Grade
05/77 - 03/81	Claims Representative	SSA/OPNS-NY	GS-0105-5/7/9/10
03/81 - 08/81	Operations Analyst	SSA/OPNS-NY	GS-0105-10
08/81 - 12/84	Operations Supervisor	SSA/OPNS-NY	GS-0105-11
12/84 - 10/92	Social Insurance Program Specialist	SSA/OPNS-NY	GS-0105-12
10/92 - 12/03	Assistant Regional Counsel	SSA/OPNS-NY	GS-0905-11/12/13/14/15
12/03 - 04/07	Supvy Regional Counsel	SSA/OPNS-NY	GS-0905-15
04/07 - 01/10	Deputy Regional Chief Counsel	SSA/OPNS-NY	GS-0905-15
01/10 -	Regional Chief Counsel	SSA/OPNS-NY	SES

### Education

College/University	Degree	Year	Course of Study
Iona College	B.A.	1975	History
Fordham School of Law	J.D.	1992	

### Awards

Type	Year
Commissioner's Citation	2003
SES Performance Bonus	2014
General Counsel's Citation	2003

Type	Year
Regional Commissioner's Citation	2003/1991
Associate Commissioner's Citation	1986
Hammer Team Award	1999
Recognition of Contribution	2008/2006/2005/2003/2002/2001/2000/1999/1996/ 1991/1988/1987/1984/1979
Quality Step Increase	2010/2007/2004/1991/1990/1989
Special Act or Service Award	2008/2004/2003/2001/2000/1999/1998/1997/1988
Mack Davis Values Award	2000

## SES Member Bios

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**Name:** CRISTAUDO, Frank A.

**Title:** Executive Counselor to the Commissioner (Ltd)



### Previous Work History

Dates	Position Title	Organization
07/78 - 06/90	Attorney	Private Law Practice

### Federal Government Positions

Dates	Position	Location	Series/Grade
07/90 - 09/95	Administrative Law Judge	SSA/ODAR-NY	AL-0935-3
10/95 - 07/96	Hearing Office Chief Admin Law Judge	SSA/ODAR-NY	AL-0935-3
08/96 - 04/06	Regional Chief Admin Law Judge	SSA/ODAR-Philadelphia	AL-0935-2
05/06 - 09/06	Acting Deputy Chief Admin Law Judge	SSA/ODAR	AL-0935-2
10/06 - 01/11	Chief Admin Law Judge	SSA/ODAR	AL-0935-1
01/11 - 06/12	Associate Chief Admin Law Judge	SSA/ODAR	AL-0935-2
07/12 - 01/15	Acting Regional Chief Counsel	SSA/OGC-Boston	AL-0935-2
01/15 -	Executive Counselor to the Commissioner	SSA/OC	SES

### Education

College/University	Degree	Year	Course of Study
McDaniel College	B.A.		Spanish/Education
Widener University	J.D.		

### Awards

Type	Year

## SES Member Bios

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**Name:** CUMMING, K. Sue

**Title:** Deputy Associate Commissioner for Public Service and  
Operations Support



### Previous Work History

Dates	Position Title	Organization

### Federal Government Positions

Dates	Position	Location	Series/Grade
08/87 - 07/98	Social Insurance Representative	SSA/OPNS-KC	GS-0105-7/9/10/11/12
07/98 - 09/99	District Manager	SSA/OPNS-KC	GS-0105-13
09/99 - 02/05	Supervisory Management Analyst	SSA/OPNS-KC	GS-343-14
02/05 - 08/08	Human Resources Director	SSA/OPNS-KC	GS-0201-15
08/08 - 08/10	SES Candidate Development Program	SSA/OHR	GS-0301-15
08/10 - 07/11	Senior Program Analyst	SSA/OPNS	GS-343-15
07/11 - 10/16	Staff Director, HR	SSA/OPNS/OPSOS	GS-343-15
10/16 -	Deputy Associate Commissioner	SSA/OPNS/OPSOS	SES

### Education

College/University	Degree	Year	Course of Study
University of Nebraska at Kearney	B.A.		Sociology

### Awards

Type	Year
Exemplary Contribution or Service Award	2015/2011
Performance Award	2015/2012/2010/2009/1997/1993/1991/1990/1989
Quality Step Increase	2014/2008/2001/1999/1995/1992



Type	Year
Special Act or Service Award	1998/1996/1994/1992/1990

## SES Member Bios

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**Name:** DEBELIUS, Kleo

**Title:** Deputy Associate Commissioner for Disability  
Information Systems



### Previous Work History

Dates	Position Title	Organization

### Federal Government Positions

Dates	Position	Location	Series/Grade
06/99 - 06/02	Computer Specialist	SSA/OS	GS-0334-7/9/11
06/02 - 09/07	IT Specialist	SSA/OS	GS-2210-11/12/13/14
09/07 - 11/09	Branch Cheif	SSA/OS/OASSIS	GS-2210-14
11/09 - 05/12	Division Director, Information Systems	SSA/OS/OASSIS	GS-2210-15
05/12 - 01/15	Director, Architecture, Testing and Security	SSA/OS/OASSIS	GS-2210-15
01/15 - 09/16	SES CDP Candidate Development Program	SSA/OHR	GS-0301-15
09/16 -	Deputy Associate Commissioner	SSA/OS/DIS	SES

### Education

College/University	Degree	Year	Course of Study
Towson University	B.S.	1995	Mathematics
Loyola College	MS.Ed.	2000	Education

### Awards

Type	Year
Performance Award	2015/2014/2012/2011/2010/2009
Exemplary Contribution or Service Award	2014/2011/2010

## SES Member Bios

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**Name:** DIAMOND, Lester P.

**Title:** Deputy Associate Commissioner for Enterprise Support  
Architecture and Engineering



### Previous Work History

Dates	Position Title	Organization
1981 - 1985	Associate Engineer	IBM
1988 - 1991	Instructor, Graduate School of Industrial Administration	Carnegie Mellon University
1991 - 1994	Assistant Professor, School of Information Studies	Syracuse University
1994	Group Director	Project Performance Corp
1994 - 1995	Senior Consultant	Computer Strategies, Inc.
1994 - 2004	Adjunct Faculty	Syracuse University
1995 - 1996	Director, Office of Information Management	Development Alternative, Inc.
1997 - 1998	Director of Info Systems for Exploration and Production	TSSI, Statoil Energy
1998 - 1999	Senior Consultant	Systems Alliance

### Federal Government Positions

Dates	Position	Location	Series/Grade
09/99 - 5/01	Supvy Information System	GAO	PE-1550-III
05/01 - 01/06	Assistant Director, Info Systems	GAO	PE-1550-III
01/06 - 07/11	Associate Chief Info Officer for IT Investment Mgmt	SSA/OCIO	SES
07/11 - 02/12	Deputy Associate Commissioner	SSA/OS/OEEAS	SES
02/12 - 01/15	Deputy Associate Commissioner	SSA/OS/OESAE	SES
01/15 -	Deputy Associate Commissioner	SSA/OCTO/OESAE	SES

### Education

College/University	Degree	Year	Course of Study
Massachusetts Institute of Technology	B.S.	1981	Materials Science & Engineering
State University of New York	M.A.	1983	Political Science

College/University	Degree	Year	Course of Study
Carnegie Mellon University	M.B.A.	1986	Business Administration
Carnegie Mellon University	M.S.	1988	Information Systems

## Awards

Type	Year
Commissioner's Team Award	2010
SES Performance Bonus	2014/2009/2008
Individual Cash Award	2006/2005(3)/2004/2003(4)/2002(3)/2001

## SES Member Bios

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**Name:** DONKAR, Eli N.

**Title:** Deputy Chief Actuary (Short-Range)



### Previous Work History

Dates	Position Title	Organization
06/69 - 08/69	Teaching Assistant	Washington University
09/71 - 01/72	Teaching Assistant	Princeton University
07/73 - 08/73	Research Associate	Princeton University
09/73 - 06/76	Assistant Professor of Mathematics	John Hopkins University
09/76 - 07/77	Instructor of Mathematics	Bay College of Maryland

### Federal Government Positions

Dates	Position	Location	Series/Grade
06/68 - 09/68	Postal Carrier	U.S. Post Office	PF-5
08/77 - 12/82	Actuary	SSA/OACT	GS-9/11/12/13/14
12/84 - 08/95	Supvy Actuary	SSA/OACT	GS-15
08/95 -	Deputy Chief Actuary	SSA/OACT	SES

### Education

College/University	Degree	Year	Course of Study
Washington University	B.A.	1969	
Princeton University	Ph.D.	1973	

### Awards

Type	Year
Presidential Rank Award - Meritorious	2001
Commissioner's Citation	2001/1990
Commissioner's Team Award	2007/2006(2)/2003

Type	Year
SES Performance Bonus	2014/2013/2011/2010/2009/2008/2007/2006/2005/ 2004/2003/2002/2000/1999/1998/1997
Performance Award	1995/1993/1992/1991/1990/1989/1988/1986/1985/1984
Special Act Award	1995/1993/1992(2)/1991/1990

## SES Member Bios

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**Name:** DORN, Linda M.

**Title:** Regional Commissioner, Boston



### Previous Work History

Dates	Position Title	Organization
01/75 - 09/79	Disability Examiner	Michigan DDS
09/79 - 04/80	Medical Relations Coordinator	Michigan DDS
04/80 - 02/84	District Manager	Michigan DDS
02/84 - 11/88	Regional Manager	Michigan DDS
11/88 - 06/91	Administrative Services Director	Michigan DDS
06/91 - 09/96	Deputy Director	Michigan DDS
09/96 - 05/02	Bureau Director	Michigan DDS

### Federal Government Positions

Dates	Position	Location	Series/Grade
08/02 - 01/07	Social Insurance Specialist	SSA/OPNS-Chicago	GS-0105-14
01/07 - 07/08	Deputy Center Director, Disability	SSA/OPNS-Chicago	GS-0105-14
07/08 - 07/10	SES Candidate Development Program	SSA/OHR	GS-0301-15
12/10 - 03/13	Associate Commissioner	SSA/OPNS/ODD	SES
03/13 - 09/14	Deputy Regional Commissioner	SSA/OPNS-Boston	SES
09/14 -	Regional Commissioner	SSA/OPNS-Boston	SES

### Education

College/University	Degree	Year	Course of Study
Michigan State University	B.A.	1974	Social Work
Michigan State University	M.A.	1976	Educational Psychology

### Awards

Type	Year
Commissioner's Citation	1993
Commissioner's Team Award	2006
Deputy Commissioner's Team Award	2008/2006
Associate Commissioner's Citation	1993
Commissioner's Pioneer Award Citation for Prototype Leadership	2001
State of Michigan Award for Excellence in Leadership	1993
SES Performance Bonus	2014/2013/2011
Quality Step Increase	2008
Performance Award	2009/2006
Exemplary Contribution or Service Award	2007
Executive Recognition Team Award	2007
Special Act or Service Award	2006/2005



## SES Member Bios

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**Name:** DOYLE, Bonnie L.

**Title:** Director, Executive and Special Services Staff



### Previous Work History

Dates	Position Title	Organization

### Federal Government Positions

Dates	Position	Location	Series/Grade
05/73 - 02/75	Clerk (Steno)	SSA/OA/OPA	GS-3/4
02/75 - 04/80	Secretary (Steno)	SSA	GS-5/6
05/80 - 03/82	Personnel Assistant	SSA/OHR	GS-7
03/82 - 05/95	Personnel Management Specialist	SSA/OHR/OPE	GS-9/11/12/13
05/95 - 04/05	Human Resources Specialist	SSA/OHR/ESSS	GS-13/14/15
04/05 - 12/08	Director	SSA/OHR/ESSS	GS-15
12/08 - 02/10	Director	SSA/OHR/ESSS	SES
02/10 - 06/14	Associate Commissioner for Personnel	SSA/OHR/OPE	SES
06/14 -	Director	SSA/OHR/ESSS	SES

### Education

College/University	Degree	Year	Course of Study
University of Maryland, University College	B.S.	1985	Business Administration

### Awards

Type	Year
Commissioner's Citation	2001/1998
SES Performance Bonus	2014/2013/2011/2010/2009
Deputy Commissioner's Citation	2008/2003/2000/1997

Type	Year
Component Head Citation	2003/1998
Quality Step Increase	2006/2002/1995/1992/1991/1990/1989/1979
Performance Award	2008/2006/2005/2004/2003/2002/2001/2000/1999/1998/1993/1988
Special Act or Service Award	1998/1997/1996/1995/1994(2)/1993/1992/1989

## SES Member Bios

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**Name:** DUMSER, Rachel E.

**Title:** Associate Commissioner for Disability Systems



### Previous Work History

Dates	Position Title	Organization

### Federal Government Positions

Dates	Position	Location	Series/Grade
06/97 - 06/02	IT Specialist	SSA/OS/OIM	GS-2210-7/9/11/12
06/02 - 10/05	Lead IT Specialist	SSA/OS/ODSSIS	GS-2210-13/14
10/05 - 03/06	Branch Chief	SSA/OS/ODS	GS-2210-14
03/06 - 08/08	Division Director	SSA/OS/ODS	GS-2210-15
08/08 - 05/10	SES Candidate Development Program	SSA/OHR	GS-0301-15
06/10 - 02/11	Acting Deputy Associate Commissioner	SSA/OS/OASSIS	GS-2210-15
02/11 - 12/13	Deputy Associate Commissioner	SSA/OS/OASSIS	SES
12/13 - 05/14	Deputy Associate Commissioner	SSA/OS/ODS	SES
05/14 -	Associate Commissioner	SSA/OS/ODS	SES

### Education

College/University	Degree	Year	Course of Study
University of Connecticut	B.A.	1991	Art History

### Awards

Type	Year
Commissioner's Citation	2005
Commissioner's Team Award	2008/2006
SES Performance Bonus	2014

Type	Year
Deputy Commissioner's Citation	2009(2)/2007/2006/2005
Associate Commissioner's Citation	2008/2003/2001/2000/1998
Exemplary Contribution or Service Award	2010/2007
Performance Award	2009/2008/2006/2001/2000/1999
Commendable Act or Service Award	2006/2003/2002/2001
On the Spot Award	2005/2004/1999

## SES Member Bios

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**Name:** ECKERT, Marti A.

**Title:** Associate Commissioner for Information Security



### Previous Work History

#### Federal Government Positions

Dates	Position	Location	Series/Grade
06/81 - 12/87	Social Insurance Specialist	SSA/OPNS-Chicago	GS-0993-5/7/8
12/87 - 05/90	Social Insurance Systems Analyst	SSA/OS/OSR	GS-0105-7/9/11
05/90 - 03/99	Social Insurance Systems Specialist	SSA/OS/OSR	GS-0105-12/13
03/99 - 06/02	Supvy Social Insurance Specialist	SSA/OS/OSES	GS-0334-14
06/02 - 01/06	Supvy Computer Specialist	SSA/OS/OSES	GS-0334-15
01/06 - 04/09	Deputy Associate Commissioner	SSA/OS/OSES	SES
04/09 - 05/11	Assistant Associate Commissioner for Enterprise IT Operations and Security	SSA/OS/OTSO	SES
05/11 - 02/16	Deputy Associate Commissioner	SSA/OS/OTSO	SES
02/16 -	Associate Commissioner	SSA/OS/OIS	SES

### Education

College/University	Degree	Year	Course of Study
University of Dayton	B.A.	1981	Public Administration
Loyola College	M.B.A.	1994	Business Administration

### Awards

Type	Year
Commissioner's Citation	1995
Commissioner's Team Award	2008/2002
Deputy Commissioner's Citation	2005/2000/1997/1995
SES Performance Bonus	2014/2013/2011

Type	Year
Component Head Citation	2005/1999/1998(2)/1991
Quality Step Increase	2002/2001/1995/1993
Performance Award	2005/2004/2003/2000/1998/1997/1993/1991/1990
Special Act or Service Award	1999/1996/1994/1992/1987/1984
On the Spot Award	2001

## SES Member Bios

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**Name:** EGAN, Raymond S.

**Title:** Assistant Regional Commissioner for Management  
Operations and Support (NY)



### Previous Work History

Dates	Position Title	Organization
06/88 - 08/88	Clerk	Shearson Lehman Brothers
06/89 - 08/89	Receptionist	Midland Bank
06/90 - 08/90	Receptionist	Midland Bank

### Federal Government Positions

Dates	Position	Location	Series/Grade
06/91 - 09/93	Social Insurance Representative	SSA/OPNS-NY	GS-0105-7/9/10
09/93 - 07/98	Social Insurance Specialist	SSA/OPNS-NY	GS-0105-11
07/98 - 05/99	NYC Enrichment Program	SSA/OPNS-NY	GS-0301-12
05/99 - 05/01	Social Insurance Specialist (MSS)	SSA/OPNS-NY	GS-0105-12
05/01 - 06/02	NYC Enrichment Program - Management Participant	SSA/OPNS-NY	GS-0301-12
06/02 - 10/02	Area Office Assistant	SSA/OPNS-NY	GS-0105-12
10/02 - 01/03	Social Insurance Specialist	SSA/OPNS-NY	GS-0105-12
01/03 - 02/04	NYC Enrichment Program	SSA/OPNS-NY	GS-0301-13
02/04 - 09/05	Assistant District Manager	SSA/OPNS-NY	GS-0105-13
09/05 - 08/08	Disability Program Administrator	SSA/OPNS-NY	GS-0105-14
08/08 - 07/09	Deputy Center Director for Disability	SSA/OPNS-NY	GS-0105-14
07/09 - 01/12	Disability Center Director		GS-0105-15

Dates	Position	Location SSA/OPNS- NY	Series/Grade
01/12 - 07/13	SES Candidate Development Program	SSA/OHR	GS-0301-15
07/13 - 07/14	Disability Center Director	SSA/OPNS- NY	GS-0105-15
07/14 - Present	Deputy ARCMOS	SSA/OPNS- NY	GS-0343-15
07/16 -	ARCMOS	SSA/OPNS- NY	SES

## Education

College/University	Degree	Year	Course of Study
State University of New York at Albany	B.S.	1991	Business

## Awards

Type	Year
Commissioner's Team Award	2011
Deputy Commissioner's Citation	2007
Regional Commissioner's Citation	2007/2005
New York State Deputy Commissioner's Citation	2008
Associate Commissioner's Citation	2008
Executive Recognition Award	2007
Performance Award	2016/2015/2014/2011/2009/2008/2006 (2)/2005/2004
Quality Step Increase	2016/2014/2012/2011/2010
Exemplary Contribution or Service Award	2015/2014/2010(2)/2006/2005



## SES Member Bios

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**Name:** ELLIS, Debby S.

**Title:** Assistant Regional Commissioner  
for Processing Center Operations, San Francisco



### Previous Work History

Dates	Position Title	Organization

### Federal Government Positions

Dates	Position	Location	Series/Grade
07/75 - 07/77	Social Insurance Representative	SSA/OPNS-San Francisco	GS-0105-5/7
07/77 - 11/77	Claims Clerk	SSA/OPNS-San Francisco	GS-0998-4
11/77 - 09/80	Social Insurance Representative	SSA/OPNS-San Francisco	GS-0105-5/7/9
09/80 - 12/81	Management Intern	SSA/OMB/OHR	GS-0301-9/11
12/81 - 02/83	Administration Intern	SSA/OMB/OT	GS-0301-12
02/83 - 06/84	Program Analyst	SSA/OPNS	GS-0345-12
06/84 - 06/85	Administrative Officer	SSA/OSR	GS-0341-12
06/85 - 03/89	Supvy Computer Systems Analyst	SSA/OIS	GS-0334-13
03/89 - 12/89	Management Analyst	SSA/OM	GS-0343-13
12/89 - 08/90	Supvy Computer Systems Analyst	SSA/OM	GS-0334-14
08/90 - 03/91	Computer Specialist	SSA/OM	GS-0334-14
03/91 - 06/02	Supvy Computer Specialist	SSA/OS	GS-0334-14
	Branch Chief	SSA/OS/OESAE	GS-2210-14

Dates	Position	Location	Series/Grade
06/02 - 06/04			
06/04 - 09/05	Advanced Leadership Program	SSA/OHR	GS-0301-14/15
09/05 - 10/06	Division Director	SSA/OS/OESAE	GS-2210-15
10/06 - 07/08	Senior Technical Advisor	SSA/OS/ODS	GS-2210-15
08/08 - 04/10	SES Candidate Development Program	SSA/OHR	GS-0301-15
04/10 - 06/10	Deputy Associate Commissioner	SSA/OS/OASSIS	SES
06/10 - 07/11	Deputy Associate Commissioner	SSA/OS/ODS	SES
07/11 - 09/13	Associate Commissioner	SSA/OS/OASSIS	SES
09/13 -	ARPCO	SSA/OPNS-San Francisco	SES

## Education

College/University	Degree	Year	Course of Study
California State University	B.A.	1973	Sociology
Johns Hopkins University	M.S.	1994	Business

## Awards

Type	Year
Commissioner's Citation	2008
Commissioner's Team Award	2000
Deputy Commissioner's Citation	2008/2007(2)/2000/1999
SES Performance Bonus	2014/2013/2011
Hammer Award	1995
Quality Step Increase	1997/1995/1991/1989
Performance Award	1998/1993/1992/1991/1990/1988
Special Act or Service Award	1998/1996/1995/1994/1993(2)/1990/1988

## SES Member Bios

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**Name:** EVANGELISTA, Stephen G.

**Title:** Associate Commissioner for Data Exchange  
and Policy Publications



### Previous Work History

Dates	Position Title	Organization

### Federal Government Positions

Dates	Position	Location	Series/Grade
07/96 - 05/02	Social Insurance Specialist	SSA/OPNS-Boston	GS-0105-7/9/11
05/02 - 09/03	Managerial Associate Intern	SSA/OPNS-Boston	GS-0301-11
09/03 - 10/03	Social Insurance Specialist	SSA/OPNS-Boston	GS-0105-11
10/03 - 05/05	Area Staff Assistant	SSA/OPNS-Boston	GS-0105-12
05/05 - 07/05	Leadership Development Program	SSA/OPNS-Boston	GS-0301-13
07/05 - 07/06	Management Analyst	SSA/ODISP	GS-0343-13
07/06 - 07/08	Special Assistant	SSA/ORDP	GS-0301-14
07/08 - 07/10	SES Candidate Development Program	SSA/OHR	GS-0301-15
07/10 - 08/11	Social Insurance Specialist	SSA/ORDP	GS-0105-15
08/11 - 01/13	Office Director	SSA/ORDP/OPPS	GS-0105-15
01/13 - 05/13	Acting Deputy Associate Commissioner	SSA/OPNS/OTS	GS-0343-15
05/13 -	Associate Commissioner	SSA/ORDP/ODEPP	SES

### Education

College/University	Degree	Year	Course of Study
Providence College	B.A.	1996	Humanities/Italian

### Awards

Type	Year
SES Performance Bonus	2014/2013

Type	Year
Performance Award	2012/2011/2009/2008/2006
Deputy Commissioner's Team Award	2008
Exemplary Contribution or Service Award	2012/2007
Commissioner's Citation	2006
Individual Service or Contribution Award	2006
Quality Step Increase	2006
On the Spot Award	2005

## SES Member Bios

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**Name:** EVERETT, Sheila S.

**Title:** Regional Commissioner, Dallas



### Previous Work History

Dates	Position Title	Organization
06/77 - 12/83	Disability Examiner	Mississippi DDS
01/84 - 01/85	Area Supervisor	Mississippi DDS
02/85 - 10/89	Division Director	Mississippi DDS
11/89 - 10/97	Deputy Director and Operations Manager	Mississippi DDS
11/97 - 04/05	Director	Mississippi DDS

### Federal Government Positions

Dates	Position	Location	Series/Grade
-04/05 - 06/06	Social Insurance Specialist	SSA/OPNS-Atlanta	GS-0105-13
06/06 - 01/08	Project Manager	SSA/OPNS/ODD	GS-0105-14/15
01/08 - 07/08	Senior Advisor	SSA/OPNS/ODD	GS-0105-15
07/08 - 05/10	SES Candidate Development Program	SSA/OHR	GS-0301-15
05/10 - 04/12	Deputy Associate Commissioner	SSA/ORDP/ODP	SES
04/12 - 05/13	Associate Commissioner	SSA/ORDP/OMVE	SES
05/13 -	Regional Commissioner	SSA/OPNS-Dallas	SES

### Education

College/University	Degree	Year	Course of Study
Mississippi State University	B.S.	1974	Educational Psychology
Mississippi State University	M.Ed.	1975	Vocational Rehab Counseling

### Awards

Type	Year
Commissioner's Citation	2004

Type	Year
Commissioner's Team Award	2007/2006
SES Performance Bonus	2014/2011/2010
Associate Commissioner's Citation	2003/2002/1994/1989
Mississippi Dept of Rehabilitation Services Manager of the Year	1997
Deputy Commissioner's Award	2008(2)/2007/2005/2004
NADE DDS Director Award	2004
Quality Step Increase	2007
Performance Award	2009/2008/2006
Exemplary Contribution or Service Award	2010

## SES Member Bios

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**Name:** FELLONA, Thomas J.

**Title:** Associate Commissioner for Systems Operations



### Previous Work History

Dates	Position Title	Organization
05/87 - 08/94	Senior Database Administrator	Procter and Gamble
07/97 - 10/97	Director of Database Operations	Random House

### Federal Government Positions

Dates	Position	Location	Series/Grade
08/94 - 07/97	Computer Specialist	SSA/OS/OTSO	GS-0334-12/13
10/97 - 07/03	Computer Specialist	SSA/OS/OTSO	GS-0334-13/14
07/03 - 09/06	Branch Chief	SSA/OS/OTSO	GS-2210-14
09/06 - 02/13	Division Director	SSA/OS/OTSO	GS-2210-15
02/13 - 07/16	Assistant Associate Commissioner for Enterprise IT Operations and Security	SSA/OS/OTSO	SES
07/16 -	Associate Commissioner for Systems Operations	SSA/OS/OSOHE	SES

### Education

College/University	Degree	Year	Course of Study
Stevenson University	A.A.	1985	Computer Info Systems
Stevenson University	B.S.	1987	Computer Info Systems

### Awards

Type	Year
SES Performance Bonus	2014/2013
Deputy Commissioner's Citation	2010

Type	Year
Associate Commissioner's Citation	2009/2007/2006
Associate Commissioner's Team Award	2010/2007(2)
Performance Award	2012/2011/2010/2006
Quality Step Increase	2009/2008/2005/2003/2001/1998/1996
Special Act or Service Award	2005/1995(2)
Exemplary Contribution or Service Award	2011
On the Spot Award	2006/2005(2)



## SES Member Bios

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**Name:** FLICK, Brad A.

**Title:** Deputy Regional Commissioner, Chicago



### Previous Work History

Dates	Position Title	Organization

### Federal Government Positions

Dates	Position	Location	Series/Grade
07/96 - 09/99	Claims Representative	SSA/OPNS-Chicago	GS-0105-7/9/11
09/99 - 03/03	Program Analyst	SSA/OPNS/OAS	GS-0343-12/13
03/03 - 10/05	Social Insurance Specialist	SSA/OPNS/OPSOS	GS-0105-14
10/05 - 07/08	Division Director	SSA/OPNS/OPSOS	GS-0343-15
07/08 - 01/10	SES Candidate Development Program	SSA/OHR	GS-0301-15
01/10 - 08/11	Associate Chief Information Officer for Information Security	SSA/OCIO	SES
08/11 - 03/13	Associate Commissioner	SSA/OS/OIS	SES
03/13 - 08/13	ARPCO	SSA/OPNS-Chicago	SES
08/13-09/16	ARCMOS	SSA/OPNS-Chicago	SES
09/16 -	Deputy Regional Commissioner	SSA/OPNS-Chicago	SES

### Education

College/University	Degree	Year	Course of Study

College/University	Degree	Year	Course of Study
University of Evansville	B.S.	1995	Business Administration

## Awards

Type	Year
Commissioner's Citation	2006
SES Performance Bonus	2013/2011/2010
Chief Information Officer Citation	2008/2006/2005
Deputy Commissioner's Citation	2007
Associate Commissioner's Citation	2005
Recognition of Contribution	2008/2006(2)/2005/2004
Performance Award	1998/1997

## SES Member Bios

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**Name:** FOLEY, Dennis R.

**Title:** Deputy Associate General Counsel for Program Law



### Previous Work History

Dates	Position Title	Organization
11/95 - 04/97	Attorney	John L. Bagwell, P.C.

### Federal Government Positions

Dates	Position	Location	Series/Grade
05/97 - 06/04	Attorney	SSA/OGC/OPL	GS-0905-12/13/14
06/04 - 08/16	Supvy Attorney	SSA/OGC/OPL	GS-0905-15
08/16 -	Deputy Associate General Counsel	SSA/OGC/OPL	SES

### Education

College/University	Degree	Year	Course of Study
Duke University	B.A.	1990	Public Policy Studies
College of William & Mary	J.D.	1995	

### Awards

Type	Year
Commissioner's Citation	2012
Commissioner's Team Award	2013/2012/2006(2)/2000
General Counsel's Citation	2007/2006/2005

Type	Year
General Counsel's Excellence in Service Award	2010/2004
Deputy Commissioner's Citation	2010/2008/2006/2005
Associate General Counsel's Citation	2010/2003
Recognition of Contribution	2015/2014/2012/2011/2010/2009/2008/2007/2006/2005/2004/2003/2002/2001/2000/1999
Exemplary Contribution or Service Award	2015/2010/2008
On-the-Spot Award	2005(2)/2001(2)/1997
Commendable Act or Service Award	2005/2004/2003/2002/2001/2000/1999/1998
Time Off Award	2003

## SES Member Bios

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**Name:** FOSTER, David V.

**Title:** Senior Advisor to the General Counsel



### Previous Work History

Dates	Position Title	Organization
07/87 - 03/88	Field Director	George Bush for President Campaign
04/88 - 08/88	Executive Director	George Bush for President Campaign
09/88 - 11/88	Research Director	George Bush for President Campaign
1993	Special Asst United States Attorney	United States Attorney's Office
1993 - 1994	Counsel for Legislative Affairs	National Leadership Coalition on Health Care
1994 - 1998	Director, Government Relations	Genzyme Corporation
1999 - 2006	Vice President, Government Relations	Biogen Idec

### Federal Government Positions

Dates	Position	Location	Series/Grade
08/89 - 12/92	Special Asst to the General Counsel	DHHS	
02/07 - 05/08	Chief of Staff	SSA/OC	SES (N/C)
05/08 - 01/09	Executive Counselor to the Commissioner	SSA/OC	SES
01/09 - 01/10	Deputy Commissioner	SSA/ODAR	SES
01/10 - 09/13	Assistant Deputy Commissioner	SSA/OQP	SES
09/13 - 11/14	Senior Innovation Advisor	SSA/OCSO	SES
11/14 -	Senior Advisor	SSA/OGC	SES

### Education

College/University	Degree	Year	Course of Study
Bowdoin College	B.A.	1981	Government and Legal Studies

College/University	Degree	Year	Course of Study
Northeastern University School of Law	J.D.	1985	

## Awards

Type	Year
SES Performance Bonus	2014/2013/2011/2009

## SES Member Bios

**Name:** FOUSHEE, Janice G.

**Title:** Associate Commissioner for Central Operations



### Previous Work History

Dates	Position Title	Organization

### Federal Government Positions

Dates	Position	Location	Series/Grade
05/76 - 03/81	Claims Authorizer	SSA/OPNS-Atlanta	GS-0993-7/9/10
03/81 - 05/81	Social Insurance Claims Examiner		GS-0993-11
05/81 - 07/86	Supvy Assistant Mod Manager		GS-0993-11
07/86 - 10/90	Operations Supervisor		GS-0105-11
10/90 - 08/92	Branch Manager		GS-0105-12
08/92 - 01/95	Area Administrative Assistant		GS-0105-12
01/95 - 08/01	Supvy Social Insurance Specialist		GS-0105-12/13
08/01 - 10/01	Assistant District Manager		GS-0105-13
10/01 - 07/06	Center Director, Human Resources		GS-0343-14/15
07/06 - 10/09	Regional Communications Director	SSA/OPNS-Denver	GS-1035-15
10/09 - 10/11	SES Candidate Development Program	SSA/OHR	GS-0301-15
10/11 - 03/12	Acting Deputy Associate Commissioner	SSA/OPNS/OPSOS	GS-0340-15
03/12 - 10/12	Acting Assistant Associate Commissioner for Management and Operations Support	SSA/OPNS/OCO-MOS	GS-0340-15
10/12 - 09/13	Assistant Associate Commissioner for Management and Operations Support	SSA/OPNS/OCO-MOS	SES
09/13 - 11/14	Deputy Associate Commissioner	SSA/OPNS/OCO	SES
11/14 -	Associate Commissioner	SSA/OPNS/OCO	SES

**Education**

College/University	Degree	Year	Course of Study
University of Alabama	B.S.	1973	Education

**Awards**

Type	Year
Commissioner's Citation	2008
SES Performance Bonus	2014/2013
Associate Commissioner's Team Award	1997
Associate Commissioner's Citation	1996
Performance Award	2012/2011/2010/2009/2008/2005/2004/2002/2001/2000/1999
Quality Step Increase	2009
Executive Recognition Team Award	2007
Special Act or Service Award	2006/1999(2)/1998/1997/1996(2)
Exemplary Contribution or Service	2012/2009/2008/2007
On the Spot Award	2005



## SES Member Bios

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**Name:** FRIENDSHIP, Stanley C.

**Title:** Regional Commissioner, Seattle



### Previous Work History

Dates	Position Title	Organization
12/75 - 09/77	Employment Service Coordinator	Community Home Health Care

### Federal Government Positions

Dates	Position	Location	Series/Grade
02/80 - 09/85	Claims Representative	SSA/OPNS-Seattle	GS-5/7/9/10
09/85 - 06/88	Teleservice Center Supervisor	SSA/OPNS-Seattle	GS-10
06/88 - 10/89	Teleservice Center Manager	SSA/OPNS-Seattle	GS-11
10/89 - 01/92	TSC Section Chief	SSA/OPNS-Seattle	GS-12
01/92 - 03/93	Field Operations Staff Specialist	SSA/OPNS-Seattle	GS-12
03/93 - 12/96	Assistant District Manager	SSA/OPNS-Seattle	GS-13
12/96 - 11/00	District Manager	SSA/OPNS-Seattle	GS-14
11/00 - 01/06	Area Director	SSA/OPNS-Seattle	GS-15
01/06 - 07/07	SES Candidate Development Program	SSA/OPNS-Seattle	GS-15
12/07 - 01/10	Deputy Regional Commissioner	SSA/OPNS-Seattle	SES
01/10 -	Regional Commissioner	SSA/OPNS-Seattle	SES

### Education

College/University	Degree	Year	Course of Study
University of Washington	B.A.	1980	Social Work

### Awards

Type	Year
SES Performance Bonus	2014/2013/2011/2010/2009
Deputy Commissioner's Citation	2004

Type	Year
Performance Award	2006(2)/2005/2004/2003/2002(2)/2001/2000/1999/1998(2)/ 1997/1996(2)/1995/1994/1993/1992(2)/1991/1990
Component Head Citation	2003/1997/1994(2)

## SES Member Bios

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**Name:** FUNNIÉ, Joscelyn N.

**Title:** Deputy Assistant Inspector General for  
**Communications**  
**and Resource Management**



### Previous Work History

Dates	Position Title	Organization

### Federal Government Positions

Dates	Position	Location	Series/Grade
10/98 - 06/99	Law Clerk	SSA/OIG	GS-0904-9
06/99 - 07/08	Attorney	SSA/OIG	GS-0905-11/12/1314
07/08 - 12/10	SES Candidate Development Program	SSA/OHR	GS-0301-15
12/10 - 04/14	Attorney	SSA/OIG	GS-0905-14
04/14 - 09/15	Associate Counsel for Civil Monetary Penalty Litigation	SSA/OIG	GS-0905-15
09/15 -	Deputy Assistant Inspector General	SSA/OIG/OCRM	SES

### Education

College/University	Degree	Year	Course of Study
University of Baltimore	B.S.	1995	Criminal Justice
University of Baltimore School of Law	J.D.	1998	

### Awards

Type	Year
Commissioner's Team Award	2015/2014
Council of the Inspector General on Integrity and Efficiency Team Award	2014

Type	Year
Inspector General Award	2013/2008/2004
Deputy Commissioner's Citation	2010
Associate Commissioner's Transformational Leadership Award	2010
Performance Award	2012/2011/2010/2009/2008/2007/2006/2005/2004/2003/2002
Quality Step Increase	2008/2006

## SES Member Bios

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**Name:** GAMBINO, Philip A.

**Title:**Senior Advisor to the Deputy Commissioner for Operations



### Previous Work History

Dates	Position Title	Organization

### Federal Government Positions

Dates	Position	Location	Series/Grade
10/76 - 06/81	Social Insurance Representative	SSA	GS-5/7/9/11
06/81 - 01/82	Social Insurance Specialist	SSA/OOPP	GS-11
01/82 - 10/82	Public Information Specialist	SSA/OPA	GS-12
10/82 - 03/83	Public Affairs Specialist	SSA/OGA	GS-12
03/83 - 12/86	Public Affairs Specialist	SSA/Press Office	Gs-13
12/86 - 06/88	Supvy Public Affairs Specialist	SSA/PEA	GS-14
06/88 - 12/92	Supvy Public Affairs Specialist	SSA	GS-15
12/92 - 02/97	Press Officer	SSA/OC	SES
02/97 - 08/15	Assistant Deputy Commissioner	SSA/OCOMM	SES
08/15 -	Senior Advisor	SSA/OPNS	SES

### Education

College/University	Degree	Year	Course of Study
University of Maryland	B.S.	1975	Public Administration

### Awards

Type	Year
Presidential Rank Award - Distinguished	2007
Presidential Rank Award - Meritorious	2001/1996
Commissioner's Citation	1985
SES Performance Bonus	2014/2013/2011/2010/2009/2008/2006/2005/2004/2003/ 2002/2000/1999/1998/1997/1994
Special Act Award	1979
Quality Step Increase	1982/1980
Sustained Superior Performance Award	1986/1984
Performance Award	1991/1990/1989/1988

## SES Member Bios

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**Name:** GANGLOFF, Joseph E.

**Title:** Counsel to the Inspector General



### Previous Work History

Dates	Position Title	Organization

### Federal Government Positions

Dates	Position	Location	Series/Grade
1977 - 1988	Trial Attorney	Dept of Justice	
1988 - 1992	Director, Conflicts of Interest Crimes Branch	Dept of Justice	
1993 - 2001	Trial Attorney	Dept of Justice	
2001 - 2005	Senior Counsel, International Affairs	Dept of Justice	
2005 - 2015	Deputy Director	U.S. Office of Govt Ethics	
2015 -	Counsel to the Inspector General	SSA/OIG	

### Education

College/University	Degree	Year	Course of Study
St. Joseph's College	B.A.	1974	Politics
University of Pennsylvania Law School	J.D.	1977	

### Awards

Type	Year

## SES Member Bios

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**Name:** GARLAND, Jonas M.

**Title:** Associate Commissioner for Security and Emergency Preparedness



### Previous Work History

Dates	Position Title	Organization
06/04 - 08/04	Lead Specialist-Defense Analysis	General Dynamics Advanced Info Systems
08/04 - 08/05	Team Lead/Tech Manager	General Dynamics Advanced Info Systems

### Federal Government Positions

Dates	Position	Location	Series/Grade
08/05 - 04/06	Chief, Staff Coordination	DHS/OI&A	GS-0132-14
04/06 - 08/09	Director, Executive Secretariat	DHS/OI&A	GS-0132-15
08/09 - 01/10	Executive Officer	DHS/OI&A	GS-0301-15
01/10 - 04/11	Chief of Staff	DHS/OI&A	GS-0301-15
04/11 - 04/12	Business Officer Director	DHS/OI&A	GS-0301-15
04/12 - 01/13	Deputy Associate Commissioner	SSA/OBFM/OSEP	GS-0342-15
01/13 -	Associate Commissioner	SSA/OBFQM/OSEP	SES

### Education

College/University	Degree	Year	Course of Study
Fayetteville State University	B.S.	1990	Accounting
University of Oklahoma	M.E.	1995	Adult and Higher Education

### Awards

Type	Year



Type	Year
SES Performance Bonus	2014
Performance Award	2011/2010/2009/2007/2006
Individual Cash Award	2010(2)/2009(2)/2008(3)
Quality Step Increase	2006

## SES Member Bios

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**Name:** GARRIGUES, John R.

**Title:** Chief Program Officer



### Previous Work History

Dates	Position Title	Organization

### Federal Government Positions

Dates	Position	Location	Series/Grade
12/96 - 04/00	Aviation Maintenance Manager	US Army	
04/00 - 05/02	Info Assurance/Mgmt Officer	US Army	
06/02 - 04/04	Info Systems Technician	US Army	
07/04 - 02/06	IT Specialist	SSA/OS/OTSO	GS-2210-13
02/06 - 11/07	Chief, Network Monitoring and Operations	SSA/OS/OTSO	GS-2210-14
11/07 - 09/12	Director, Second Support Center	SSA/OS/OTSO	GS-2210-15
09/12 - 11/16	Assistant Associate Commissioner for Data Center Operations	SSA/OS/OTSO	SES
11/16 - Present	Chief Program Officer	SSA/OS	SES

### Education

College/University	Degree	Year	Course of Study
University of Maryland	B.S.	2003	Computer Studies

### Awards

Type	Year
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Type	Year
Commissioner's Team Award	2009
Performance Award	2012/2010/2008/2007/2006
Exemplary Contribution or Service Award	2009
Commendable Act or Service Award	2007/2006/2005(2)
Quality Step Increase	2001
On the Spot Award	2005

## SES Member Bios

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**Name:** GARRISON-DANIELS, Elaine

**Title:** Assistant Regional Commissioner for Processing  
Center Operations (Philadelphia)



### Previous Work History

Dates	Position Title	Organization

### Federal Government Positions

Dates	Position	Location	Series/Grade
09/83 - 10/93	SICE (Retirement)	SSA/OPNS-Phila	GS-0993-4/5/7/8/9/10
10/93 - 07/95	Supvy Social Insurance Specialist	SSA/OPNS-Phila	GS-0105-12
07/95 - 10/97	Program Analyst	SSA/OPNS-Phila	GS-0343-12
10/97 - 10/98	Social Insurance Administrator	SSA/OPNS-Phila	GS-0301-13
10/98 - 11/98	Program Analyst	SSA/OPNS-Phila	GS-0343-12
11/98 - 05/00	Social Insurance Administrator	SSA/OPNS-Phila	GS-0105-13
05/00 - 08/02	Supvy Employee Development Specialist	SSA/OPNS-Phila	GS-0235-13
08/02 - 06/04	Supvy HR Specialist	SSA/OPNS-Phila	GS-0201-13
06/04 - 05/05	Advanced Leadership Program	SSA/OHR	GS-0301-13
05/05 - 06/06	Supvy Social Insurance Specialist	SSA/OPNS-Phila	GS-0105-14
06/06 - 09/06	Executive Officer	SSA/OPNS-Phila	GS-0105-15
09/06 - 09/09	Deputy Assistant Regional Commissioner for Processing Center Operations	SSA/OPNS-Phila	GS-0343-15
09/09 -	Assistant Regional Commissioner for Processing Center Operations	SSA/OPNS-Phila	SES

### Education

College/University	Degree	Year	Course of Study
Pennsylvania State University	B.S.	1982	Economics

### Awards

Type	Year
SES Performance Bonus	2014
Quality Step Increase	2006/2000
Performance Award	2009/2008/2004/2001/1993/1991/1990/1989/1988(2)
Exemplary Contribution or Service Award	2007(2)
Special Act or Service Award	2005/1998/1997/1996/1995/1994/1993/1992/1991/1988/1987

## SES Member Bios

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**Name:** GASPARINI, Joanne

**Title:** Deputy Associate Commissioner for Financial Policy  
and Operations



### Previous Work History

Dates	Position Title	Organization

### Federal Government Positions

Dates	Position	Location	Series/Grade
06/79 - 05/80	Clerk Typist	SSA/ODO	GS-0322-2/3
05/80 - 12/80	Clerk Typist	SSA/OSSI	GS-0322-3
12/80 - 01/82	Clerk-Steno	SSA/OSSI	GS-0312-4
01/82 - 01/84	Secretary	SSA/OSSI	GS-0318-5
01/84 - 08/84	Secretary	SSA/OC	GS-0318-6
08/84 - 12/86	Management Assistant	SSA/OC	GS-0344-6/7
12/86 - 01/88	Administrative Specialist	SSA/CFO	GS-0301-9
06/88 - 03/89	Operating Accountant	SSA/OMB/OFPO	GS-0510-9
03/89 - 06/90	Systems Accountant	SSA/OMB/OFPO	GS-0510-11/12
06/90 - 08/94	Financial Management Analyst	SSA/OMB/OFPO	GS-0510-12
08/94 - 03/97	Operating Accountant	SSA/OFAM/OFPO	GS-0510-13
04/99 - 10/02	Accountant	SSA/OFAM/OFPO	GS-0510-13/14
10/02 - 09/09	Supvy Financial Management Analyst	SSA/OBFM/OFPO	GS-0510-15
09/09 - 07/11	Deputy Associate Commissioner	SSA/OBFM/OFPO	SES
07/11 - 06/13	Senior Advisor (Performance Improvement)	SSA/OQP	SES
06/13 -	Deputy Associate Commissioner	SSA/OBFQM/OFPO	SES

**Education**

College/University	Degree	Year	Course of Study
Towson State University			Accounting

**Awards**

Type	Year
Commissioner's Team Award	2006/2005
SES Performance Bonus	2014
Deputy Commissioner's Citation	2004/2001/2000/1991
Performance Award	2006/2005/2004/2003(2)/2002(3)/2001/2000(2)/1999/1998(2)/1997(2)/1996/1995/1994/1993(2)/1992(2)/1990(2)
Component Head Citation	1995

## SES Member Bios

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**Name:** GLENN, Karen P.

**Title:** Deputy Chief Actuary (Long-Range)



### Previous Work History

Dates	Position Title	Organization
10/95 - 08/08	Various Actuary positions	Aon Consulting

### Federal Government Positions

Dates	Position	Location	Series/Grade
09/08 - 09/09	Actuary	SSA/OAct	GS-1510-14
09/09 - 09/15	Supvy Actuary	SSA/OAct	GS-1510-15
09/15 - 07/16	Acting Deputy Chief Actuary	SSA/OAct	GS-1510-15
07/16 -	Deputy Chief Actuary (Long-Range)	SSA/OAct	SES

### Education

College/University	Degree	Year	Course of Study
Amherst College	B.A.	1993	Mathematics
Johns Hopkins University	M.A.	1996	Mathematics

### Awards

Type	Year
Commissioner's Team Award	2015/2014
Commissioner's Citation	2011
Deputy Commissioner's Team Award	2012
Performance Award	2015/2014/2012/2010



Type	Year
Quality Step Increase	2011
Exemplary Contribution or Service Award	2015(2)/2014/2011

## SES Member Bios

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**Name:** GOBLE, Christopher R.

**Title:** Assistant Associate Commissioner for Disability  
Operations



### Previous Work History

Dates	Position Title	Organization

### Federal Government Positions

Dates	Position	Location	Series/Grade
01/83 - 01/89	Data Transcriber	SSA/OPNS-Dallas	GS-0256-2/3
01/89 - 07/89	Computer Operator	SSA/OPNS-Dallas	GS-0332-5/6
07/89 - 04/91	Contact Representative	SSA/OPNS-Dallas	GS-0965-6/7
04/91 - 08/97	Social Insurance Representative	SSA/OPNS-Dallas	GS-0105-7/9/10/11
08/97 - 02/99	Management Development Program	SSA/OPNS-Dallas	GS-0301-11/12
02/99 - 05/00	Social Insurance Specialist	SSA/OPNS-Dallas	GS-0105-12
05/00 - 01/01	Area Administrative Assistant	SSA/OPNS-Dallas	GS-0105-13
01/01 - 06/03	Assistant District Manager	SSA/OPNS-Dallas	GS-0105-13
06/03 - 03/04	Lead Management Analyst	SSA/OPNS-Dallas	GS-0343-13
03/04 - 05/06	District Manager	SSA/OPNS-Dallas	GS-0105-14
05/06 - 10/09	Area Director	SSA/OPNS-Dallas	GS-0105-15
10/09 - 10/11	SES Candidate Development Program	SSA/OHR	GS-0301-15
10/11 - 11/12	Area Director	SSA/OPNS-Dallas	GS-0105-15
11/12 - 05/13	Acting Deputy Regional Commissioner	SSA/OPNS-Dallas	GS-0105-15
05/13 - 11/14	Deputy Associate Commissioner	SSA/OPNS/OEST	SES
11/14 - 08/15	Deputy Associate Commissioner	SSA/OPNS/ODD	SES

Dates 08/15 -	Position Assistant Associate Commissioner for Disability Operations	Location SSA/OPNS/OCO	Series/Grade SES
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## Education

College/University	Degree	Year	Course of Study
University of New Mexico	B.A.	2009	Natural Sciences/Mathematics

## Awards

Type	Year
Performance Award	2012/2010/2009/2008/2003
Exemplary Contribution or Service	2012/2007
Commissioner's Team Award	2006
Individual Contribution or Service	2006/2004/2002
Quality Step Increase	2011
Leadership Excellence Award	2004

## SES Member Bios

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**Name:** GOSS, Stephen C.

**Title:** Chief Actuary



### Previous Work History

Dates	Position Title	Organization

### Federal Government Positions

Dates	Position	Location	Series/Grade
08/73 - 05/83	Actuary	SSA/OAct	GS-7/9/11/12/13/14
05/83 - 08/95	Supvy Actuary	SSA/OAct	GS-15
08/95 - 01/01	Deputy Chief Actuary (Long-Range)	SSA/OAct	SES
01/01 -	Chief Actuary	SSA/OAct	SES

### Education

College/University	Degree	Year	Course of Study
University of Pennsylvania	B.A.	1971	
University of Virginia	M.S.	1973	Mathematics

### Awards

Type	Year
Presidential Rank Award - Distinguished	2002
Presidential Rank Award - Meritorious	1999
Commissioner's Leadership Award	1999
Commissioner's Team Award	2006(2)

Type	Year
SES Performance Bonus	2014/2013/2007/2006/2005/2004/2003/2001/1998/1997
Commissioner's Citation	1998/1988
Quality Step Increase	1974
Special Achievement Award	2001/1980
Performance Award	1995/1993/1992/1990/1989/1988/1986/1985/1984
HHS Secretary's Recognition Award	1987
On-the-Spot Award	1990
Special Act or Service Award	1994(2)/1993/1992(2)/1990/1989

## SES Member Bios

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**Name:** GOWER, Adam C.

**Title:** Deputy Associate Commissioner for Personnel



### Previous Work History

Dates	Position Title	Organization

### Federal Government Positions

Dates	Position	Location	Series/Grade
06/01 - 06/02	Personnel Staffing Specialist	SSA/OHR/OPE	GS-0212-07
06/02 - 10/09	HR Specialist	SSA/OHR/OPE	GS-0201-09/11/12/13/14
10/09 - 10/11	SES Candidate Development Program	SSA/OHR	GS-0301-15
10/11 - 02/12	HR Specialist	SSA/OHR/OPE	GS-0201-15
02/12 - 01/13	Supvy HR Specialist	SSA/OHR/OPE	GS-0201-15
01/13 - 06/16	Center Director	SSA/OHR/OPE	GS-0201-15
06/16 -	Deputy Associate Commissioner	SSA/OHR/OPE	SES

### Education

College/University	Degree	Year	Course of Study
Johns Hopkins University	B.A.	2001	History/English
University of Baltimore	M.P.A.	2007	Public Administration

### Awards

Type	Year
Performance Award	2016/2015/2014/2012/2011/2010/2009/2008/2007/2006
Commissioner's Team Award	2009/2008/2006
Exemplary Contribution or Service	2015/2009/2008(2)/2007(2)
Special Act or Service Award	2006
On-the-Spot Award	2006

## SES Member Bios

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**Name:** GRUBER, Theresa L.

**Title:** Deputy Commissioner for Disability Adjudication  
and Review



### Previous Work History

Dates	Position Title	Organization

### Federal Government Positions

Dates	Position	Location	Series/Grade
06/91 - 10/97	Social Insurance Specialist	SSA/OPNS-Chicago	GS-0105-7/9/10/11
10/97 - 03/99	Disability Claims Manager	SSA/OPNS-Chicago	GS-0105-12
03/99 - 03/00	Management Support Specialist	SSA/OPNS-Chicago	GS-0105-12
03/00 - 10/00	Leadership Development Program	SSA	GS-0301-12
10/00 - 04/04	Assistant District Manager	SSA/OPNS-Chicago	GS-0105-13
04/04 - 07/05	Executive Officer	SSA/OPNS/OPSOS	GS-0343-14
07/05 - 10/06	Program Manager	SSA/OPNS/ODD	GS-0343-15
10/06 - 07/08	Division Director	SSA/OPNS/ODD	GS-0343-15
07/08 - 01/10	SES Candidate Development Program	SSA/OHR	GS-0301-15
01/10 - 01/11	Asistant Deputy Commissioner	SSA/ODAR	SES
01/11 - 08/15	Assistant Deputy Commissioner	SSA/OPNS	SES
08/15 -	Deputy Commissioner	SSA/ODAR	SES

### Education

College/University	Degree	Year	Course of Study
St. Mary's University of Minnesota	B.A.	1991	English Literature & Political Science



## Awards

Type	Year
Commissioner's Citation	2007/2001/2000
Commissioner's Team Award	2007/2006
SES Performance Bonus	2014/2013/2012/2011/2010
Regional Commissioner's Citation	2007
Regional Commissioner's Team Award	2007
Deputy Commissioner's Citation	2008/2007
Deputy Commissioner's Team Award	2005
Associate Commissioner's Citation	2008
Performance Award	2006(2)/2005/2003/2002/1998/1997/1996/1993
Commendable Act or Service Award	2004
Special Act or Service Award	2001/2000/1999/1996
Federal Executive Board Civil Servant of the Year	1997

## SES Member Bios

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**Name:** GRZYMSKI, Thomas G.

**Title:** Assistant Deputy Commissioner for Systems  
(Systems Operations and Hardware Engineering)



### Previous Work History

Dates	Position Title	Organization

### Federal Government Positions

Dates	Position	Location	Series/Grade
09/78 - 05/81	Computer Specialist	SSA/BDP	GS-07/9/11
05/81 - 11/81	Computer Programmer	SSA/OSD	GS-11
11/81 - 12/83	Computer Systems Analyst	SSA/OSD	GS-12
12/83 - 04/96	Supvy Computer Systems Analyst	SSA/OSI	GS-13/14
04/96 - 09/00	Supvy Computer Specialist	SSA/OIM	GS-15
09/00 - 11/01	Computer Specialist	SSA/OS	GS-15
11/01 - 04/03	Supvy IT Specialist	SSA/OS/OESAE	GS-15
04/03 - 04/04	Deputy Associate Commissioner	SSA/OS/OESAE	SES (Ltd Term)
04/04 - 07/05	Deputy Associate Commissioner	SSA/OS/OESAE	SES
07/05 - 04/10	Associate Commissioner	SSA/OS/OESAE	SES
04/10 - 07/16	Associate Commissioner	SSA/OS/OTSO	SES
07/16 -	Assistant Deputy Commissioner	SSA/OS	SES

### Education

College/University	Degree	Year	Course of Study
Loyola College	B.A.	1977	Sociology

College/University	Degree	Year	Course of Study
Johns Hopkins University	M.A.S.	1987	Information Systems

## Awards

Type	Year
Commissioner's Citation	2005/1985
Commissioner's Team Award	2006/2005
SES Performance Bonus	2014/2013/2011/2010/2009/2008/2007/2006/2005/2004
Quality Step Increase	2000/1997/1996/1982
Performance Award	1995/1993/1992/1991/1990/1989/1988/1987(2)/1986/1985
Special Act or Service Award	1993/1992/1990/1989/1983

## SES Member Bios

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**Name:** HAIRSTON, Roderick O.

**Title:** Senior Advisor to the Regional Commissioner,  
Atlanta



### Previous Work History

Dates	Position Title	Organization
11/91 - 01/94	Computer Specialist	Tidewater Tech
01/94 - 01/95	Support Specialist	Computer Dynamics, Inc.
01/95 - 06/95	LAN Engineer	CEEXEC, Inc.

### Federal Government Positions

Dates	Position	Location	Series/Grade
06/95 - 10/97	Computer Specialist	SSA/OS/OTSO	GS-11/12
10/97 - 04/00	Lead Computer Specialist	SSA/OS/OTSO	GS-13
04/00 - 11/03	Supvy Computer Specialist	SSA/OS/OTSO	GS-14
11/03 - 01/06	Supvy IT Specialist	SSA/OS/OTSO	GS-15
01/06 - 07/07	SES Candidate Development Program	SSA/OHR	GS-15
03/08 - 04/10	Deputy Associate Commissioner	SSA/OS/OTSO	SES
04/10 - 06/10	Deputy Associate Commissioner	SSA/OS/ORSIS	SES
06/10 - 05/14	Associate Commissioner	SSA/OS/ODS	SES
05/14 -	Senior Advisor to the Regional Commissioner	SSA/OPNS-Atlanta	SES

### Education

College/University	Degree	Year	Course of Study
Old Dominion University	B.S.	1991	Management Information Systems

**Awards**

Type	Year
Commissioner's Citation	2005/1998
Commissioner's Team Award	2004
SES Performance Bonus	2013/2011/2010/2009
Deputy Commissioner's Citation	2004/2003/2002
Associate Commissioner's Citation	2002/2001/1999
Performance Award	2006(2)/2005(4)/2004(2)/2003(4)/2002(2)/2001(3)/2000(4)/1999(3)/1998(3)/1997(2)/1996(2)

## SES Member Bios

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**Name:** HALDIMAN, Sylviane D.

**Title:** Assistant Deputy Commissioner for Systems



### Previous Work History

Dates	Position Title	Organization

### Federal Government Positions

Dates	Position	Location	Series/Grade
10/81 - 08/84	Claims Clerk	SSA/OPNS-Boston	GS-0998-3/4
08/84 - 07/86	Contact Representative	SSA/OPNS-Boston	GS-0962-5/6
07/86 - 03/91	Social Insurance Specialist	SSA/OPNS-Boston	GS-0105-7/9/10
03/91 - 07/00	Supvy Social Insurance Specialist	SSA/OPNS-Boston	GS-0105-11/12
07/00 - 07/02	Leadership Development Program	SSA/OPNS	GS-0301-13
07/02 - 01/04	Assistant District Manager	SSA/OPNS-Boston	GS-0105-13
01/04 - 07/08	District Manager	SSA/OPNS-Boston	GS-0105-14
07/08 - 03/10	SES Candidate Development Program	SSA/OHR	GS-0301-15
03/10 - 04/10	Deputy Associate Commissioner	SSA/OPNS/OES	SES
04/10 - 01/11	Deputy Associate Commissioner	SSA/OPNS/OAS	SES
01/11 - 07/12	Associate Commissioner	SSA/OPNS/OES	SES
07/12 - 08/14	Associate Commissioner	SSA/OPNS/OAS	SES
08/14 - 08/15	Associate Commissioner	SSA/OS/OEEAS	SES
08/15 -	Assistant Deputy Commissioner	SSA/OS	SES

**Education**

College/University	Degree	Year	Course of Study

**Awards**

Type	Year
Quality Service Honor Award	2006
SES Performance Bonus	2014/2013
Deputy Commisisoner's Citation	1999
Regional Commissioner's Citation	1996
Quality Step Increase	1999/1996
Performance Award	2008/2005/2003/2000/1998/1997/1995/1993/1992/ 1991/1990/1989/1988
Exemplary Contribution or Service Award	2007
Special Act or Service Award	2005/2004/2002/1994/1993(2)
On-the-Spot Award	2001

## SES Member Bios

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**Name:** HALL, Frankie B.

**Title:** Assistant Regional Commissioner for Processing  
Center Operations, Atlanta

### Previous Work History

Dates	Position Title	Organization

### Federal Government Positions

Dates	Position	Location	Series/Grade
08/74 - 03/77	Benefit Authorizer	SSA/OPNS-Atlanta	GS-0105-08
03/77 - 05/83	Claims Authorizer	SSA/OPNS-Atlanta	GS-0105-09/10
05/83 - 05/91	Assistant Module Manager	SSA/OPNS-Atlanta	GS-0301-12
05/91 - 10/99	Module Manager	SSA/OPNS-Atlanta	GS-0340-13
12/00 - 12/07	Operations Support Branch Chief	SSA/OPNS-Atlanta	GS-0105-14/15
01/08 - 08/16	Deputy ARPCO	SSA/OPNS-Atlanta	GS-0105-15
08/16 -	ARPCO	SSA/OPNS-Atlanta	SES

### Education

College/University	Degree	Year	Course of Study
Miles College	B.A.		Business Management

### Awards

Type	Year
Deputy Commissioner Citation	2010
Commissioner's Citation	2004
Quality Step Increase	2014/2012/2001/1989
Recognition of Contribution	2015/2013/2011/2010/2009/2008/2007/2006/2005/2004/2003/2002/2000/1999/1998/1997/1996/1995/1994/1993/1992/1991/1990/1988/1987/1986



Type	Year
Special Act or Service Award	2012/2011/2010/2009/1995/1993/1991/1988
Supervisory Excellence Award	1998
On-the-Spot Award	1990

## SES Member Bios

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**Name:** Hall, Stephanie J.

**Title:** Senior Advisor to the Deputy Commissioner for Operations



### Previous Work History

Dates	Position Title	Organization

### Federal Government Positions

Dates	Position	Location	Series/Grade
06/86 - 06/87	Program Analyst	Dept of Navy	GS-2/3/4/5
06/87 - 12/88	Accountant	GAO	GS-7/9
12/88 - 03/95	Auditor	HHS/OIG	GS-9/11/12/13
03/95 - 01/97	Auditor	SSA/OIG/OA	GS-13
01/97 - 09/98	Supvy Auditor	SSA/OIG/OA	GS-14
09/98 - 07/00	Supvy Management Analyst	SSA/OIG/OMS	GS-15
07/00 - 02/08	Assistant Inspector General	SSA/OIG/ODO	SES
02/08 - 12/09	Deputy Associate Commissioner	SSA/OQP/OQR	SES
12/09 - 04/12	Assistant Deputy Commissioner	SSA/OBFM	SES
04/12 - 09/13	Deputy Commissioner	SSA/OQP	SES
09/13 -	Senior Advisor to the Deputy Commissioner	SSA/OPNS	SES

### Education

College/University	Degree	Year	Course of Study
University of Maryland	B.S.	1987	Accounting

**Awards**

Type	Year
Commissioner's Citation	1998
Commissioner's Team Award	2007/2005/1998
Presidential Rank Award - Meritorious	2012
SES Performance Bonus	2014/2013/2011/2010/2009/2008/2007/2006/2005/2004/2003
Special Act or Service Award	2000/1999/1996/1995
Performance Award	1999/1998

## SES Member Bios

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**Name:** HANSEN, Erik T.

**Title:** Associate Commissioner for Legislative  
Development  
and Operations



### Previous Work History

Dates	Position Title	Organization
10/94 - 07/95	Caseworker	State of Missouri Family Services

### Federal Government Positions

Dates	Position	Location	Series/Grade
07/95 - 03/00	Social Insurance Specialist	SSA/OPNS-KC	GS-0105-7/9/11/12
03/00 - 04/02	Leadership Development Program	SSA/OPNS	GS-0301-12
04/02 - 11/02	Social Insurance Specialist	SSA/OPNS-KC	GS-0105-12
11/02 - 05/04	Lead Management Analyst	SSA/OPNS-KC	GS-0343-13
05/04 - 07/06	Social Insurance Specialist	SSA/OLCA	GS-0105-14
07/06 - 11/06	Supvy Social Insurance Specialist	SSA/OLCA	GS-0105-15
11/06 - 11/07	Social Insurance Specialist	SSA/OLCA	GS-0105-14
11/07 - 01/12	Supvy Social Insurance Specialist	SSA/OLCA/OLDO	GS-0105-15
01/12 - 01/14	SES Candidate Development Program	SSA/OHR	GS-0301-15
01/14 - 07/15	Supvy Social Insurance Specialist	SSA/OLCA/OLDO	GS-0105-15
07/15 -	Associate Commissioner	SSA/OLCA/OLDO	SES

### Education

College/University	Degree	Year	Course of Study
Phillips University	B.A.	1990	Communications

**Awards**

Type	Year
Commissioner's Team Award	2008/2007
Exemplary Contribution or Service Award	2009(2)/2008(2)/2007
Performance Award	2011/2010/2009/2008/2007/2006/2005/2004
Deputy Commissioner's Team Award	2006
Special Act or Service Award	2011/2010/2005/2004(2)/2003
On-the-Spot Award	2004
Associate Commissioner's Citation	2003
Deputy Commissioner's Citation	2007

## SES Member Bios

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**Name:** HICKMAN, Kate D.

**Title:** Assistant Deputy Commissioner for Budget,  
Finance, Quality and Management



### Previous Work History

Dates	Position Title	Organization

### Federal Government Positions

Dates	Position	Location	Series/Grade
07/75 - 10/99	Supvy Budget Analyst	US Marine Corps	GS-0560-14
10/99 - 03/05	Budget Officer	Dept of Commerce	GS-0560-15
04/05 - 01/06	Director, Executive Budgeting	Dept of Commerce	GS-0560-15
01/06 - 01/12	Administrative Officer	USDA/OCIO	GS-0341-15
01/12 - 01/13	SES Candidate Development Program	USDA	GS-0341-15
01/13 - 05/13	Administrative Officer	USDA/OCIO	GS-0341-15
05/13 - 07/15	Special Assistant to the Deputy Director	USDA/OHRM	GS-0341-15
07/15 -	Assistant Deputy Commissioner	SSA/OBFQM	SES

### Education

College/University	Degree	Year	Course of Study
East Carolina University	B.S.	1985	Business Adminstration

### Awards

Type	Year
Performance Award	

Type	Year
	2014/2013/2012/2011/2010/2009/2008/2007/2006/2005/2004/2003 2002/2001/2000/1999/1998/1997/1996/1995/1994/1993/1992/1991

## SES Member Bios

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**Name:** HINOJOSA, Hyacinth G.

**Title:** Assistant Regional Commissioner for Management and Operations Support, San Francisco



### Previous Work History

Dates	Position Title	Organization
02/86 - 05/86	Manufacturing Engineering Assistant	Northrop Electronics
06/86 - 12/88	Management Intern	AT&T
09/89 - 01/91	SIS Coordinator	LA Unified School District

### Federal Government Positions

Dates	Position	Location	Series/Grade
02/91 - 02/93	Clerk-Typist	Dept of Navy	GW-0322-3
05/95 - 09/99	Social Insurance Specialist	SSA/OPNS-SF	GS-0105-7/9/11
09/99 - 09/00	Leadership Associate	SSA/OPNS-SF	GS-0301-12
09/00 - 11/00	Management Support Specialist	SSA/OPNS-SF	GS-0105-12
11/00 - 01/02	Operations Supervisor	SSA/OPNS-SF	GS-0301-12
01/02 - 05/05	Assistant District Manager	SSA/OPNS-SF	GS-0105-12/13
05/05 - 07/08	District Manager	SSA/OPNS-SF	GS-0105-14
07/08 - 07/10	SES Candidate Development Program	SSA/OHR	GS-0301-15
07/10 - 02/11	Deputy Assistant Regional Commissioner for Processing Center Operations	SSA/OPNS-SF	GS-0105-15
02/11 - 04/13	Assistant Regional Commissioner for Processing Center Operations	SSA/OPNS-SF	SES
04/13 -	Assistant Regional Commissioner for Management and Operations Support	SSA/OPNS-SF	SES



**Education**

College/University	Degree	Year	Course of Study
San Diego State University	B.A.	1992	Economics
California State University	M.A.	1997	Public Policy and Administration

**Awards**

Type	Year
SES Performance Award	2013
Deputy Commissioner's Team Award	2007/2006
Exemplary Contribution or Service Award	2007
Special Act or Service Award	2006
Performance Award	2005/2004
Environmental Achievement Award	2004
On-the-Spot Award	2004

## SES Member Bios

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**Name:** HORNE, Mary L.

**Title:** Assistant Deputy Commissioner for Management and Operations Support, Philadelphia



### Previous Work History

Dates	Position Title	Organization

### Federal Government Positions

Dates	Position	Location	Series/Grade
11/88 - 10/89	Lead Contact Representative	SSA/OPNS-Phila	GS-0105-8
10/89 - 03/92	Claims Representative	SSA/OPNS-Phila	GS-0105-9/10
03/92 - 08/95	Operations Supervisor	SSA/OPNS-Phila	GS-0105-11/12
08/95 - 04/97	Claims Representative	SSA/OPNS-Phila	GS-0105-12
04/97 - 03/99	Management Analyst	SSA/OPNS-Phila	GS-0343-12
03/99 - 01/00	Staff Associate	SSA/OPNS-Phila	GS-0301-13
01/00 - 09/01	Area Administrative Assistant	SSA/OPNS-Phila	GS-0301-13
09/01 - 11/02	Management Associate Intern	SSA/OPNS-Phila	GS-0301-14
11/02 - 10/05	District Manager	SSA/OPNS-Phila	GS-0105-14
10/05 - 12/09	Center Director, Automation, Planning and Development	SSA/OPNS-Phila	GS-0105-15
12/09 - 11/11	Deputy Assistant Regional Commissioner for Management and Operations Support	SSA/OPNS-Phila	GS-0105-15
11/11 -	Assistant Regional Commissioner for Management and Operations Support	SSA/OPNS-Phila	SES

**Education**

College/University	Degree	Year	Course of Study

**Awards**

Type	Year
Commissioner's Citation	2009/1993
Deputy Commissioner's Citation	2009/2007
Deputy Commissioner's Team Award	2009(2)
SES Performance Bonus	2014/2013
Regional Commissioner's Citation	2008/2007
Associate Commissioner's Team Award	2009
Larry G. Massanari Public Service Award	2009
Performance Award	2006/2005/2004/1999/1998/1995/1992/1991
Quality Step Increase	2009/2008/1993
Contribution or Service Award	2006/2005/2004/2003/2000

## SES Member Bios

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**Name:** HUNGERFORD, Thomas L. (Noncareer Appointee)

**Title:** Associate Commissioner for Retirement Policy



### Previous Work History

Dates	Position Title	Organization
2003 - 2004	Director of Research / Senior Scholar	Levy Economics Institute
2004 - 2005	Economic Consultant	
2013 - 2015	Senior Economist / Director of Tax & Budget Policy	Economic Policy Institute

### Federal Government Positions

Dates	Position	Location	Series/Grade
1990 - 1998	Senior Economist, Health, Education & Human Services	GAO	
1998	Senior Economist, Economic Policy	OMB	
1998 - 2003	Senior Economist	SSA/OP	
2007 - 2008	Head of Banking, Insurance & Macroeconomic Policy	Library of Congress	
2009 - 2010	Research Manager, Govt Finance & Taxation	Library of Congress	
2005 - 2013	Specialist, Public Finance, Govt Finance & Taxation	Library of Congress	
06/15 -	Associate Commissioner	SSA/ORDP/ORP	SES

### Education

College/University	Degree	Year	Course of Study

College/University	Degree	Year	Course of Study

## Awards

Type	Year
Associate Commissioner's Citation	1999
Outstanding Performance Award (GAO)	1993/1991

## SES Member Bios

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**Name:** JACKSON, Jean M.

**Title:** Deputy Associate Commissioner for Disability  
Systems



### Previous Work History

Dates	Position Title	Organization

### Federal Government Positions

Dates	Position	Location	Series/Grade
10/76 - 10/79	Clerical	SSA/OPO	GS-0312-03/04/05
07/79 - 11/86	Benefit Authorizer	SSA/OPNS/OCO-ODO	GS-0993-04/05/07/08/09
11/86 - 08/89	Computer Programmer	SSA/OS/OPS	GS-0334-11
08/89 - 08/91	Computer Systems Analyst	SSA/OPNS/OSDD	GS-0334-12
08/91 - 04/98	Computer Systems Analyst	SSA/OS/OSDD	GS-0334-12/13
04/98 - 06/02	Lead Computer Specialist	SSA/OS/OSDD	GS-0334-13
06/02 - 01/03	Lead IT Specialist	SSA/OS/ORSIS	GS-2210-13
01/03 - 01/07	Branch Chief	SSA/OS/ORSIS	GS-2210-14
01/07 - 08/07	Advanced Leadership Program	SSA/OS/ORSIS	GS-0301-15
08/07 - 01/12	Division Director	SSA/OS/ORSIS	GS-2210-15

Dates 01/12 - 01/14	Position SES Candidate Development Program	Location SSA/OHR	Series/Grade GS-0301-15
01/14 - 11/15	Division Director	SSA/OS/ORSIS	GS-2210-15
11/15 -	Deputy Associate Commissioner	SSA/OS/ODS	SES

## Education

College/University	Degree	Year	Course of Study

## Awards

Type	Year
Commissioner's Citation	2007/2004/1995
Commissioner's Team Award	2000
Deputy Commissioner's Citation	2010/2006/2005/2004/2002
Associate Commissioner's Citation	2010/2009/2006/2000/1996
Quality Step Increase	2010/2005/2004/1996
Performance Award	2016/2015/2014/2012/2011/2009/2002/1999/1997/1993
Exemplary Contribution or Service Award	2016/2015/2012/2010/2008/2007
Special Act or Service Award	2006/2001/2000/1998(2)/1995(2)
On-the-Spot Award	2003

## SES Member Bios

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**Name:** JANDRLICH, Robert L.

**Title:** Associate Commissioner for Executive Operations  
and Human Resources



### Previous Work History

Dates	Position Title	Organization
07/91 – 01/93	Attorney	Long, Aldridge & Norman

### Federal Government Positions

Dates	Position	Location	Series/Grade
12/76 – 06/78	Social Insurance Claims Examiner	SSA/OPNS-Atlanta	GS-5/7
06/78 – 02/79	Benefit Authorizer	SSA/OPNS-Atlanta	GS-7/8
02/79 – 10/81	Claims Representative	SSA/OPNS-Atlanta	GS-7/9/10
10/81 – 10/83	Operations Supervisor	SSA/OPNS-Atlanta	GS-11
10/83 – 09/85	Branch Manager	SSA/OPNS-Atlanta	GS-12
09/85 – 07/91	Social Insurance Specialist	SSA/OPNS-Atlanta	GS-12
01/93 – 02/95	Operations Manager	SSA/OPNS-Atlanta	GS-12
02/95 – 07/96	Assistant District Manager	SSA/OPNS-Atlanta	GS-13
07/96 – 12/96	Operations Manager	SSA/OPNS-Atlanta	GS-14
12/96 – 12/99	Management Analyst	SSA/OPNS-Atlanta	GS-14
12/99 – 12/01	Executive Officer	SSA/OPNS-Atlanta	GS-15
12/01 – 03/02	Assistant Regional Commissioner for Management and Operations Support	SSA/OPNS-Atlanta	GS-15
03/02 – 05/03	Assistant Regional Commissioner for Management and Operations Support	SSA/OPNS-Denver	GS-15
05/03 – 08/16	Assistant Regional Commissioner for Management and Operations Support	SSA/OPNS-Denver	SES
08/16 -	Associate Commissioner	SSA/ODAR/OEOHR	SES

### Education



College/University	Degree	Year	Course of Study
University of Alabama	B.A.	1976	Political Science
Georgia State University	J.D.	1990	
Federal Executive Institute		2006	

## Awards

Type	Year
Commissioner's Citation	2001/1989
Component Head Citation	2001
SES Performance Bonus	2014
QSI	2002/2001/1997/1990/1986
Special Act Award	1999/1998/1997(2)/1996/1995(3)/1991/1990
Performance Award	2000/1999/1998/1996/1995/1993/1989/1988(2)/1987

## SES Member Bios

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**Name:** JONAS, Patricia A.

**Title:** Executive Director, Office of Appellate Operations



### Previous Work History

Dates	Position Title	Organization
1979 - 1986	Private Law Practice	

### Federal Government Positions

Dates	Position	Location	Series/Grade
12/83 - 08/87	Attorney-Advisor	SSA/OHA	GS-0905-9/11/12
08/87 - 07/99	Supvy Attorney	SSA/OHA	GS-0905-13
07/99 - 11/99	Attorney-Advisor	SSA/OHA	GS-0905-14
11/99 - 04/00	Supvy Attorney	SSA/OHA	GS-0905-13
04/00 - 06/02	Attorney-Advisor	SSA/OHA	GS-0905-14
06/02 - 04/04	Executive Assistant	SSA/ODISP	GS-0105-15
04/04 - 03/08	Senior Advisor to the Deputy Commissioner	SSA/ODISP	SES
03/08 - 06/08	Deputy Executive Director	SSA/ODAR/OAO	SES
06/08 -	Executive Director	SSA/ODAR/OAO	SES

### Education

College/University	Degree	Year	Course of Study
University of South Carolina	B.S.	1975	Biology
University of South Carolina	J.D.	1978	

### Awards

Type	Year

Type	Year
Presidential Rank Award - Meritorious	2010
Commissioner's Team Award	2008/2006
SES Performance Bonus	2014/2013/2011/2009/2008/2007/2006/2005/2004
Special Act or Service Award	1988
Performance Award	1996/1993/1992/1991/1990/1989(2)/1988

## SES Member Bios

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**Name:** JONES, Erik N. D.

**Title:** Assistant Deputy Commissioner for Operations



### Previous Work History

Dates	Position Title	Organization

### Federal Government Positions

Dates	Position	Location	Series/Grade
06/97 - 06/99	Presidential Management Intern	SSA/OPP	GS-0301-09/11
06/99 - 01/03	Customer Service Integration Analyst	SSA/OC	GS-0301-12/13
01/03 - 06/04	Customer Service Integration Analyst	SSA/OCSO	GS-0301-13
06/04 - 01/05	Advanced Leadership Development Program	SSA/OCSO	GS-0301-13/14
01/05 - 05/06	Lead Budget Analyst	SSA/OFAM	GS-0560-14
05/06 - 01/08	Deputy Division Director	SSA/OBFM	GS-0560-14
01/08 - 05/08	Division Director	SSA/OBFM	GS-0560-15
05/08 - 03/09	Financial Management Analyst	SSA/OBFM	GS-0501-15
03/09 - 08/09	Division Director	SSA/OBFM	GS-0560-15
08/09 - 10/09	Financial Management Analyst	SSA/OBFM	GS-0560-15

Dates 10/09 - 06/11	Position SES Candidate Development Program	Location SSA/OHR	Series/Grade GS-0301-15
06/11 - 10/11	Deputy Associate Commissioner	SSA/ODAR/OBFS	SES
10/11 - 08/12	Deputy Associate Commissioner	SSA/OBFM/OB	SES
08/12 - 08/13	Associate Commissioner	SSA/OQP/OQR	SES
08/13 - 11/15	Associate Commissioner	SSA/OPNS/OPSOS	SES
11/15 -	Assistant Deputy Commissioner	SSA/OPNS	SES

### Education

College/University	Degree	Year	Course of Study
State University of New York	B.A.	1993	German/Marketing
Indiana University	M.P.A.	1997	Policy Analysis/Resource Mgmt

### Awards

Type	Year
Commissioner's Citation	2009
Commissioner's Team Award	2004
Deputy Commissioner's Citation	2007
SES Performance Bonus	2014/2011
Deputy Commissioner's Team Award	2009
Performance Award	2009/2008/2006(2)/2004/2002
Exemplary Contribution or Service Award	2009/2008/2007
Special Act or Service Award	2006/2005/2003
Quality Step Increase	2001
On-the-Spot Award	2006/2005/2003

## SES Member Bios

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**Name:** JULIAN, James R.

**Title:** Deputy Associate Commissioner for Facilities and Supply Management



### Previous Work History

Dates	Position Title	Organization

### Federal Government Positions

Dates	Position	Location	Series/Grade
03/93 - 06/94	Disability Attorney	Army/Staff Judge Advocate	
06/94 - 06/95	Administrative Law Attorney	Army/Staff Judge Advocate	
06/95 - 05/96	Medical Malpractice Attorney	Army/Center Judge Advocate	
05/96 - 05/97	Chief, Legal Assistance Branch	Army/Staff Judge Advocate	
05/97 - 01/98	Chief, Military Law Branch	Army/Staff Judge Advocate	
01/98 - 03/99	Attorney Advisor	SSA/ODISP/OHA	GS-0905-12
03/99 - 05/00	Supvy Attorney Advisor	SSA/ODISP/OHA	GS-0905-13
05/00 - 10/04	Hearing Office Director	SSA/ODISP/OHA	GS-0905-14
10/04 - 07/08	Director, Office of Medical Policy	SSA/ORDP/ODP	
07/08 - 07/10	SES Candidate Development Program	SSA/OHR	GS-0301-15
07/10 - 10/10	Division Director	SSA/ORDP/ODP	GS-0105-15
10/10 - 05/11	Social Insurance Specialist	SSA/ORDP	GS-0105-15
05/11 - 10/11	Deputy Associate Commissioner	SSA/ODAR/OEOHR	SES
10/11 - 09/15	Associate Commissioner	SSA/ODAR/OEOHR	SES
09/15 -	Deputy Associate Commissioner	SSA/OBFQM/OFSM	SES

**Education**

College/University	Degree	Year	Course of Study
Providence College	B.A.	1989	Political Science and History
Gonzaga University School of Law	J.D.	1992	

**Awards**

Type	Year
Commissioner's Team Award	2006
SES Performance Bonus	2014/2013/2011
Deputy Commissioner's Citation	2007
Deputy Commissioner's Team Award	2007
Special Act or Service Award	2005/2002/2000/1998
Exemplary Contribution or Service Award	2007
Performance Award	2002/2001
Quality Step Increase	2009/2008/2007/2006/2003

## SES Member Bios

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**Name:** KERR-DAVIS, Linda G.

**Title:** Deputy Regional Commissioner, Kansas City



### Previous Work History

Dates	Position Title	Organization
07/92 - 08/96	Disability Examiner	Disability Determination Service
08/96 - 03/99	Unit Manager	Disability Determination Service
03/99 - 09/01	Director of Operations	Disability Determination Service

### Federal Government Positions

Dates	Position	Location	Series/Grade
09/01 - 08/08	Social Insurance Specialist	SSA/OPNS-KC	GS-0105-12/13/14
08/08 - 10/09	Senior Advisor	SSA/OPNS/ODD	GS-0105-15
10/09 - 10/11	SES Candidate Development Program	SSA/OHR	GS-0301-15
10/11 - 06/12	Deputy Associate Commissioner	SSA/OPNS/ODD	GS-0105-15
06/12 - 01/13	Deputy Associate Commissioner	SSA/OPNS/ODD	SES
01/13 - 01/16	Assistant Regional Commissioner for Processing Center Operations	SSA/OPNS-KC	SES
01/16 -	Deputy Regional Commissioner	SSA/OPNS-KC	SES

### Education

College/University	Degree	Year	Course of Study
Washburn University	B.A.	1989	Public Administration



College/University	Degree	Year	Course of Study
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## Awards

Type	Year
Commissioner's Citation	2005
Commissioner's Team Award	2009/2006
SES Performance Bonus	2014/2013
Quality Step Increase	2005
Performance Award	2011/2010/2009/2008/2006
Exemplary Contribution or Service Award	2009(2)/2008
Special Act or Service Award	2006/2004
On-the-Spot Award	2004(2)

## SES Member Bios

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**Name:** KIM, Grace M.

**Title:** Regional Commissioner, San Francisco



### Previous Work History

Dates	Position Title	Organization

### Federal Government Positions

Dates	Position	Location	Series/Grade
09/89 - 05/90	Law Clerk	SSA/OGC-Chicago	GS-0904-09/11
05/90 - 02/02	Attorney	SSA/OGC-Chicago	GS-0905-11/12/13/14
02/02 - 08/05	Supvy Attorney	SSA/OGC-Chicago	GS-0905-15
08/05 - 03/07	Attorney	SSA/OGC-Chicago	GS-0905-15
03/07 - 12/12	Deputy Regional Chief Counsel	SSA/OGC-Chicago	GS-0905-15
12/12 - 08/13	Regional Chief Counsel	SSA/OPNS-San Fran	SES
08/13 -	Regional Commissioner	SSA/OPNS-San Fran	SES

### Education

College/University	Degree	Year	Course of Study
University of Michigan	B.A.	1986	Art History/Political Science
Loyola University Chicago School of Law	J.D.	1989	

### Awards

Type	Year

Type	Year
Commissioner's Citation	2010/2003
SES Performance Bonus	2014/2013
General Counsel's Citation	2009
Regional Commissioner's Citation	2009/2007/1998
Performance Award	2012/2011/2009/1998/1997/1996/1994
Exemplary Contribution or Service	2012(2)/2010
Quality Step Increase	2010/2008/1999
Special Act or Service Award	1995

## SES Member Bios

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**Name:** KIND, Bonnie

**Title:** Associate Commissioner for Budget



### Previous Work History

Dates	Position Title	Organization

### Federal Government Positions

Dates	Position	Location	Series/Grade
05/77 - 08/78	Access Co-op Student Trainee	SSA	GS4/5
08/45 - 04/79	Budget Analyst	SSA	GS-0560-7
04/79 - 12/84	Operating Accountant	SSA	GS-510-7/9/11/12/13
12/84 - 05/88	Management Analyst	SSA/OMBPOFR	GS-0343-13
05/88 - 05/91	Chief, Financial Accounting Systems	SSA/OMBPOFR	GS-0501-14
05/91 - 04/93	Supvy Accountant	SSA/OMBPOFR	GS-0510-14/15
04/93 - 12/98	Supvy Financial Management Analyst	SSA/OFAM	GS-0510-15
12/98 - 10/02	Deputy Associate Commissioner	SSA/OFAM/OFPO	SES
10/02 - 11/05	Comptroller and Deputy Chief Financial Officer	DoD/NSA	SES
11/05 - 08/07	Comptroller and Chief Financial Officer	DoD/NSA	SES

Dates	Position	Location	Series/Grade
08/07 -	Associate Commissioner	SSA/OBFQM/OB	SES

## Education

College/University	Degree	Year	Course of Study
University of Maryland	B.S.	1978	Accounting
Loyola College	M.B.A.	1984	

## Awards

Type	Year
Presidential Rank Award- Meritorious	2006
Commissioner's Team Award	1999(2)/1998
SES Performance Bonus	2014/2013/2011/2010/2009/2008
Hammer Award	1998
Deputy Commissioner's Citation	1998/1992
Associate Commissioner's Citation	1998/1989/1984
Performance Award	1997/1996/1993/1992/1991/1990/1989/1988
AGA Distinguished Leadership Award	1997
Special Act or Service Award	1995/1992
Quality Step Increase	1987/1985

## SES Member Bios

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**Name:** KING, Michelle A.

**Title:** Deputy Commissioner for Budget, Quality, Finance  
and Management



### Previous Work History

Dates	Position Title	Organization

### Federal Government Positions

Dates	Position	Location	Series/Grade
04/94 - 05/98	Claims Representative (Bilingual)	SSA/OPNS-Chicago	GS-7/9/11
05/98 - 08/00	Program Analyst	SSA/OPNS/OPSOS	GS-12
08/00 - 01/07	Management Analyst	SSA/OPNS/OPSOS	GS-13/14/15
01/07 - 11/07	Supvy Management Analyst	SSA/OPNS/OPSOS	GS-15
11/07 - 03/10	Deputy Associate Commissioner	SSA/OPNS/OPSOS	SES
03/10 - 07/11	Associate Commissioner	SSA/OPNS/OPSOS	SES
07/11 - 01/13	Associate Commissioner	SSA/ORDP/OISP	SES
01/13 - 08/13	Deputy Associate Commissioner	SSA/OQP/OQI	SES
08/13 - 05/15	Deputy Associate Commissioner	SSA/OBFM/OB	SES
05/15 -	Deputy Commissioner	SSA/OBFQM/OAFP	SES

### Education

College/University	Degree	Year	Course of Study
Augustana College	B.A.	1993	Political Science and Public Administration
Northern Illinois University	M.P.A.	1997	Human Services Administration

**Awards**

Type	Year
Commissioner's Citation	2007
Commissioner's Team Award	2007/2004
SES Performance Bonus	2014/2013/2011/2010/2009/2008
Deputy Commissioner's Team Award	2006(2)
Associate Commissioner's Citation	2002
Quality Step Increase	2002/1996
Performance Award	2006(2)/2005/2004/2003/2002/2001/1998/1997
Special Act or Service Award	1997/1995/1994

## SES Member Bios

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**Name:** KLOPP, Robert (Noncareer Appointee)

**Title:** Deputy Commissioner for Systems



### Previous Work History

Dates	Position Title	Organization
1987 – 1993	Manager, Database Technologies	Teradata
1993 – 1996	Chief Technology Officer	Sage Communications
1996 – 1998	Vice President of Data Warehousing	Per-Se Technologies and BSG Corporation
1998 – 2002	Founder/CEO	WhoWhatWare Corp.
2002 – 2009	Independent Consultant	Skyland Technologies
2009 – 2012	Chief Technology Officer	EMEA
2012 – 2015	Senior Director, Technology and Innovation	SAP

### Federal Government Positions

Dates	Position	Location	Series/Grade
01/15 - 08/15	Chief Technology Officer	SSA	SES
08/15 -	Deputy Commissioner for Systems	SSA/OS	SES

### Education

College/University	Degree	Year	Course of Study

### Awards

Type	Year



## SES Member Bios

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**Name:** KOCH, Nora

**Title:** Regional Chief Counsel (Philadelphia)



### Previous Work History

Dates	Position Title	Organization
1991-1993	Law Clerk	Angelini, Vinjar & Freedman
1993-1994	Associate	Angelini, Vinjar & Freedman

### Federal Government Positions

Dates	Position	Location	Series/Grade
1994-2003	Assistant Regional Counsel/Attorney-Advisor	SSA/OGC	GS-0905-14
2003-2008	Supervisory Attorney	SSA/OGC	GS-0905-15
2007-2008	Acting Division Director	SSA/OGC	GS-0905-15
2008-2011	Acting Deputy Regional Chief Counsel	SSA/OGC	GS-0905-15
2012-2013	Deputy Regional Chief Counsel	SSA/OGC	GS-0905-15
2013-2016	Acting Regional Chief Counsel	SSA/OGC-Philadelphia	GS-0905-15
2016-	Regional Chief Counsel	SSA/OGC-Philadelphia	SES

### Education

College/University	Degree	Year	Course of Study
Rutgers University School of Business	B.S.	1989	Management
Rutgers University School of Law	J.D.	1993	

### Awards

Type	Year
Quality Service Award	2006/2004/2000
Excellence-In-Service Award	2001
Supervisory Excellence Award	2009

## SES Member Bios

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**Name:** KRABBE, Carla A.

**Title:** Associate Commissioner for Financial Policy and Operations



### Previous Work History

Dates	Position Title	Organization
06/77 – 10/77	Staff Auditor	Peat, Marwick, Mitchell & Co.

### Federal Government Positions

Dates	Position	Location	Series/Grade
02/78 – 05/83	Systems Accountant	SSA/OMB/OFR	GS-0510-7/9/11/12/13
05/83 – 05/87	Deputy Branch Chief	SSA/OMB/OFR	GS-0501-13
05/87 – 04/91	Supvy Fiscal Mgmt Analyst	SSA/OMB/OFPO	GS-0501-14
04/91 – 03/02	Deputy Director, Office of Financial Policy and Integrity	SSA/OFAM/OFPO	GS-0501-15
03/02 – 07/09	Director, Office of Financial Policy and Integrity	SSA/OBFM/OFPO	GS-0501-15
07/09 – 07/10	Deputy Associate Commissioner for Financial Policy and Operations	SSA/OBFM/OFPO	SES
07/10 -	Associate Commissioner for Financial Policy and Operations	SSA/OBFM/OFPO	SES

### Education

College/University	Degree	Year	Course of Study
Loyola College	BA	1977	Accounting
Loyola College	MBA	1980	Finance

### Awards

Type	Year
Commissioner's Team Award	2006/2004

Type	Year
SES Performance Bonus	2014/2013/2011
Deputy Commissioner's Team Award	2006
Performance Award	2008/2006(2)/2005/2004/2003/2002/2001(2)/1997/1996/ 1995(2)/1994(2)/1993(2)/1991(2)/1990(2)
Component Head Citation	1995

## SES Member Bios

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**Name:** KRAMER, Michael P.

**Title:** Regional Commissioner, Kansas City



### Previous Work History

Dates	Position Title	Organization

### Federal Government Positions

Dates	Position	Location	Series/Grade
06/91 – 08/99	Claims Representative	SSA/OPNS-KC	GS-0105-7/9/10/11
08/99 – 01/01	Management Analyst	SSA/OPNS-KC	GS-0343-12
01/01 – 02/06	Lead Social Insurance Specialist	SSA/OPNS-KC	GS-0105-13
02/06 – 10/07	Project Manager	SSA/OPNS-KC	GS-0105-14
10/07 – 07/08	District Manager	SSA/OPNS-KC	GS-0105-14
07/08 – 07/10	SES Candidate Development Program	SSA/OHR	GS-0301-15
07/10 – 04/11	Acting Deputy Associate Commissioner for Facilities Management	SSA/OBFM/OFM	GS-0301-15
04/11 – 07/11	Deputy Associate Commissioner for Facilities Management	SSA/OBFM/OFM	SES
07/11 – 03/12	Deputy Associate Commissioner for Security and Emergency Preparedness	SSA/OBFM/OSEP	SES
03/12 – 01/14	Asst Regional Commissioner for Mgmt and Opns Support, KC	SSA/OPNS-KC	SES
01/14 - 01/16	Deputy Regional Commissioner	SSA/OPNS-KC	SES
01/16 -	Regional Commissioner	SSA/OPNS-KC	SES

**Education**

College/University	Degree	Year	Course of Study
Washburn University of Topeka	B.A.	1990	Political Science
University of Kansas, Lawrence	M.P.A.	1995	Public Administration

**Awards**

Type	Year
Commissioner's Team Award	2001
SES Performance Bonus	2014/2013
Regional Commissioner's Outstanding Service Award	2000
Associate Commissioner's Citation	2002/2000
Quality Step Increase	2010/2001
Recognition of Contribution	2009/2008/2005/2004/2003/1999/1998/1997/1996
Special Act or Service Award	2002/2000/1998/1995/1994
Performance Award	1993/1992
On-the-Spot Award	1995/1994/1993

## SES Member Bios

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**Name:** KRESSMAN, Eric P.

**Title:** Deputy Regional Commissioner, Philadelphia



### Previous Work History

Dates	Position Title	Organization
08/95 – 08/96	Law Clerk	Pennsylvania Supreme and Superior Courts
08/96 – 03/97	Associate	Hamburg, Rubin, Mullin, Maxwell and Lupin
04/97 – 03/98	Deputy Counsel	New Jersey State Legislature

### Federal Government Positions

Dates	Position	Location	Series/Grade
03/98 – 10/02	Assistant Regional Counsel	SSA/OGC	GS-0904-13/14/15
10/02 – 11/05	Supervisor Attorney	SSA/OGC	GS-0905-15
11/05 – 09/09	Deputy Regional Chief Counsel	SSA/OGC	GS-0905-15
09/09 – 08/13	Regional Chief Counsel	SSA/OGC-Phila	SES
08/13 -	Deputy Regional Commissioner	SSA/OPNS-Phila	SES

### Education

College/University	Degree	Year	Course of Study
Rutgers University	B.A.	1992	Political Science
Temple University School of Law	J.D.	1995	

### Awards

Type	Year
SES Performance Bonus	2011
Performance Award	2008/2006/2005/2004/2003/2002/2001
Special Act or Service Award	2000/1999(2)
QSI	2009/2006/2000
Exemplary Contribution or Service Award	2007

Type	Year
CASA	2006/2005/2004(3)/2003/2002/2001
On-the-Spot Award	2004/2002

## SES Member Bios

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**Name:** LaCANFORA, Marianna E.

**Title:** Assistant Deputy Commissioner for Retirement and Disability Policy



### Previous Work History

Dates	Position Title	Organization

### Federal Government Positions

Dates	Position	Location	Series/Grade
07/96 – 10/99	Social Insurance Spec. (Bilingual)	SSA/OPNS-Boston	GS-105-7/9/11
10/99 – 12/00	Social Insurance Specialist	SSA/OFAM/OQAPA	GS-105-12
12/00 – 05/02	Special Assistant (Dep. Comm.)	SSA/OC	GS-301-13
05/02 – 05/03	Supvy Social Insurance Specialist	SSA/OPNS-Phila	GS-105-13
05/03 – 10/04	Program Analyst	SSA/OPNS/OPSOS	GS-343-14
10/04 – 06/06	Supvy Program Analyst	SSA/OPNS/OPSOS	GS-343-15
06/06 – 08/07	Deputy Assoc. Commissioner for Public Service & Opns Support	SSA/OPNS/OPSOS	SES
08/07 – 07/11	Assistant Deputy Commissioner for Retirement and Disability Policy	SSA/ORDP	SES
07/11 – 08/13	Associate Commissioner for Public Service & Ops Support	SSA/OPNS/OPSOS	SES
08/13 -	Assistant Deputy Commissioner for Retirement & Disability Policy	SSA/ORDP	SES

### Education

College/University	Degree	Year	Course of Study
University of Massachusetts	BA	1996	Spanish Language & Lit
University of Maryland (University College)	MBA	2006	

### Awards



Type	Year
Presidential Rank Award - Meritorious	2014
Commissioner Citation Team	2005/2001/2000
Deputy Commissioner Citation	2004
Component Head Citation	2003
SES Performance Bonus	2013/2012/2011/2010/2009/2008/2007/2006
Performance Award	2006/2005/2004/2003/2002/1999/1998/1997
Special Act/Service Award	2006/2002/2000
Group Special Act/Service	2003

## SES Member Bios

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**Name:** LAMBERT, Kishayra J.

**Position of Record:** Deputy Associate Commissioner for  
Systems Operations



### Previous Work History

Dates	Position Title	Organization

### Federal Government Positions

Dates	Position	Location	Series/Grade
07/00 - 12/06	Acquisition Specialist	DoD/DLA	GS-1102-7/9/11/12
12/06 - 12/08	Supervisory Integrated Supplier Team Chief	DoD/DLA	GS-1102-13
12/08 - 09/09	Supervisory Contract Specialist	DoD/Army/ACC-APG	GS-1102-YC-2
09/09 - 09/10	Supervisory Contract Specialist	DoD/Army/ACC-APG	GS-1102-14
09/10 - 04/11	Supervisory Procurement Analyst	DoD/Army/ACC-APG	GS-1102-14
04/11 - 01/15	Chief of Contracting, Philadelphia	DoD/USACE	GS-1102-15
01/15 - 11/16	SES Candidate Development Program	SSA/OHR	GS-0301-15
11/16 -	Deputy Associate Commissioner	SSA/OS/OSO	SES

### Education

College/University	Degree	Year	Course of Study
La Salle University	B.A.	2000	Criminal Justice
Regis University	M.B.A.	2006	Management
Naval Postgraduate School	M.S.	2011	Contract Management

### Awards

Type	Year
Secretary of the Army Award	2013
Quality Step Increase	2011

Type	Year
Commander's Coin	2009

## SES Member Bios

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**Name:** LANDIS, Dean S.

**Title:** Senior Advisor to the Deputy Commissioner for  
Disability Adjudication and Review



### Previous Work History

Dates	Position Title	Organization
6/85 – 9/85	Law Clerk	John Fox, Esquire
6/86 – 2/88	Law Clerk	Office of the Attorney General, Dept. of Health & Mental Hygiene

### Federal Government Positions

Dates	Position	Location	Series/Grade
04/88 – 04/89	Attorney (General)	HHS/OGC	GS-0905-11
04/89 – 03/95	Trial Attorney (General)	HHS/OGC	GS-0905-12/13/14
03/95 – 12/95	Trial Attorney (General)	SSA/OGC/OPL	GS-0905-14
12/95 – 06/01	Attorney (General)	SSA/OGC/OGL	GS-0905-14/15
12/06 – 03/08	SES Candidate Development Program	SSA/OHR	GS-0301-15
03/08 – 03/09	Director, Office of Regulations	SSA/OC	SES
03/09 – 03/10	Associate Commissioner for Regulations	SSA/OLRA	SES
03/10 – 04/10	Associate Commissioner for Regulations	SSA/ORDP	SES
04/10 – 02/13	Deputy Chief of Staff	SSA/OC	SES
02/13 –	Senior Advisor to the Deputy Commissioner for Disability Adjudication and Review	SSA/ODAR	SES

### Education

College/University	Degree	Year	Course of Study
University of Maryland	BA	1984	History
University of Baltimore Law School	JD	1987	

## Awards

Type	Year
SES Performance Bonus	2010/2009/2008
Commissioner's Citation	1997
Deputy Commissioner's Citation	2004/2000
Performance Award	2006/2005/2004(2)/2003(2)/2002/2001/2000(2)/1999/ 1998/1996(2)

## SES Member Bios

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**Name:** LANE, H. Alan

**Title:** Executive Director, Open Government



### Previous Work History

Dates	Position Title	Organization

### Federal Government Positions

Dates	Position	Location	Series/Grade
10/73 – 02/74	Park Operations Specialist	DOI/Natl Park Service	GS-5
04/74 – 10/78	Social Insurance Claims Examiner	SSA/BDI/ODO	GS-5/7/9/10
10/78 – 10/79	Budget Analyst	SSA/BDI	GS-11
10/79 – 11/81	Management Intern	SSA/OMB	GS-11/12
11/81 – 10/83	Social Insurance Specialist	SSA/OC	GS-12
10/83 – 11/91	Executive Assistant	SSA/OC	GS-13-14
11/91 - 11/98	Branch Chief	SSA/OPNS/OPSOS	GS-14
11/98 - 06/99	Project Analyst	SSA/OPNS/OPSOS	GS-14
06/99 - 04/02	Division Director	SSA/OPNS/OPSOS	GS-15
04/02 – 08/02	Deputy Associate Commissioner	SSA/OPNS/OPSOS	GS-15
08/02 – 07/04	Division Director	SSA/OPNS/OPSOS	GS-15
10/02- 04/04	SES Candidate Development Program	SSA/OHR	GS-15
07/04 – 04/06	Senior Advisor to Chief of Staff	SSA/OC	GS-15
04/06 – 06/07	Deputy Chief Quality Officer	SSA/OQP	SES

Dates	Position	Location	Series/Grade
06/07 – 07/08	Associate Commissioner	SSA/ORDP/OISP	SES
07/08 – 10/09	Executive Director, Notice Improvement	SSA/ORDP	SES
10/09 – 07/11	Associate Chief Information Officer for Open Government	SSA/OCIO	SES
07/11 – 02/14	Associate Commissioner for Open Government	SSA/OCOMM	SES
02/14 –	Executive Director, Open Government	SSA/OC SO	SES

## Education

College/University	Degree	Year	Course of Study
Johns Hopkins University	BA	1973	Liberal Arts

## Awards

Type	Year
Commissioner's Citation (Team)	2004/2003/2002/1999
Deputy Commissioner Citation	2005/1998/1997
Associate Commissioner Citation	1998
SES Performance Bonus	2015/2007/2006
QSI	2005/1995/1988/1986/1985
Performance Award	2006/2004/2003/2002/2001/2000/1999/1998/1997/1996/1993/1990/1989/1988/1984
Special Act/Svc Award	1994/1993(2)/1992/1990

## SES Member Bios

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**Name:** LAWSON, Rona M.

**Title:** Assistant Inspector General for Audit



### Previous Work History

Dates	Position Title	Organization

### Federal Government Positions

Dates	Position	Location	Series/Grade
07/89 - 06/97	Auditor	HHS(SSA)/OIG/OA	GS-0511-9/11/12/13
06/97 – 09/08	Supervisory Auditor	SSA/OIG/OA	GS-0511-14/15
09/08 – 06/16	Deputy Assistant Inspector General	SSA/OIG/OA	SES
06/16 -	Assistant Inspector General	SSA/OIG/OA	SES

### Education

College/University	Degree	Year	Course of Study
Eastern Kentucky University	BBA	1987	Accounting
University of Kentucky	MS	1991	Accounting

### Awards

Type	Year
Commissioner's Citation	2007
Commissioner's Team Award	2008/2004
PCIE Glenn Roth Award	2004
PCIE Award for Excellence	2004/2003(2)/2002/2001(2)/2000
IG Executive Recognition Award	2007
IG Honor Award	2005
IG Team Award	2004



Type	Year
Assistant IG Honor Award	2003
Assistant IG Team Award	2007/2002
QSI	2005/2003/2000
Special Act or Service Award	1997/1996/1995
Performance Award	2007/2006/2004/2003/2001/1999/1998/1995/1994//1993/1992/1991/1990
Commendable Act or Service Award	2007/2006/2005/2004/2003/2002/2001/1999/1997/1996
On-the-Spot Award	2005/2003/1994
IG Professional Development Award	1991

## SES Member Bios

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**Name:** LEE, John J.

**Title:** Regional Chief Counsel, Denver



### Previous Work History

Dates	Position Title	Organization
1989 – 1990	Law Clerk	Legal Services of Eastern Missouri
08/91 – 05/93	Associate Attorney	Stamos & Trucco

### Federal Government Positions

Dates	Position	Location	Series/Grade
05/94 – 07/01	Assistant Regional Counsel	SSA/OGC-Chicago	GS-0905-12/13/14
08/01 – 04/11	Supervisory Attorney	SSA/OGC-Chicago	GS-0905-15
04/11 –	Regional Chief Counsel	SSA/OGC-Denver	SES

### Education

College/University	Degree	Year	Course of Study
St. Olaf College	BA	1988	Spanish, Sociology, Religion
Washington University School of Law	JD	1991	

### Awards

Type	Year
SES Performance Bonus	2014/2013
Recognition of Contribution Award	2009/2007/2006/2005/2004/2002/2001/2000/1999/1997/1996
Quality Step Increase	2010/2008/2003/1998
Supervisory Excellence Award	2008
Quality Service Award	2008
Excellence in Service Award	1998

## SES Member Bios

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**Name:** LEMON, Wayne F.

**Title:** Deputy Associate Commissioner for Benefit  
Information Systems



### Previous Work History

Dates	Position Title	Organization

### Federal Government Positions

Dates	Position	Location	Series/Grade
06/88 - 09/88	Summer Aide	SSA/OCFO/OFPO	YV-3506
06/90 - 08/90	Summer Aide	SSA/OM/OHRM	YV-3506
02/91 - 06/91	Clerk	SSA/OPNS/OSS	GS-0303-03
06/91 - 11/92	Co-op/Student Trainee	SSA/OS/OSDD	GS-0099-4/5/7
11/92 - 07/99	Computer Specialist	SSA/OS/OSDD	GS-0334-7/9/11/12/13
07/99 - 04/01	Lead Computer Specialist	SSA/OS/OSDD	GS-0334-13
04/01 - 10/01	Computer Specialist	SSA/OS/OSES	GS-0334-13
10/01 - 06/03	IT Specialist	SSA/OHR/OT	GS-2210-14
06/03 - 10/04	IT Specialist	SSA/OS/ODSSIS	GS-2210-15
10/04 - 02/13	Division Director	SSA/OS/OSES	GS-2210-15
02/13 - 09/16	Deputy Associate Commissioner	SSA/OS/ORSIS	SES
09/16 -	Deputy Associate Commissioner	SSA/OS/OBIS	SES

### Education

College/University	Degree	Year	Course of Study
University of Maryland, Baltimore County	BS	1992	Information Systems
Notre Dame University of Maryland	MA	1996	Management
University of Maryland, Baltimore County	MS	1998	Information Systems
University of Maryland, Baltimore County	PhD	2007	Information Systems

**Awards**

Type	Year
Commissioner's Citation	2009
Performance Award	2012/2011/2010/2009/1998/1997/1996/1993/1992/1991
Exemplary Contribution or Service Award	2012/2011/2010
Special Act or Service Award	1997/1995/1994(2)/1993/1988
Quality Step Increase	1995

## SES Member Bios

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**Name:** LEWANDOWSKI, Mary Lisa

**Title:** Deputy Regional Commissioner, Seattle



### Previous Work History

Dates	Position Title	Organization
05/87 - 06/88	Credit Verification	Hy Cite Corporation
06/88 - 09/88	Medicaid Verification	EDS

### Federal Government Positions

Dates	Position	Location	Series/Grade
09/88 - 09/93	Claims Representative	SSA/OPNS-Chicago	GS-0105-5/7/9/10
09/93 - 01/00	Social Insurance Representative	SSA/OPNS-Chicago	GS-0105-11
01/00 - 02/02	Operations Supervisor	SSA/OPNS-Chicago	GS-0105-12
02/02 - 10/05	District Manager	SSA/OPNS-Chicago	GS-0105-13/14
10/05 - 08/09	Project Manager	SSA/OPNS/OPSOS	GS-0343-13/14
08/09 - 01/12	Deputy ARCMOS	SSA/OPNS-Denver	GS-0343-15
01/12 - 01/14	SES Candidate Development Program	SSA/OHR	GS-0301-15
01/14 - 09/14	Acting Deputy Associate Commissioner	SSA/OPNS/ODD	GS-0343-15
09/14 - 08/16	ARCMOS	SSA/OPNS-Seattle	SES
08/16 -	Deputy Regional Commissioner	SSA/OPNS-Seattle	SES

### Education

College/University	Degree	Year	Course of Study
University of Wisconsin, Madison	B.A.	1986	International Relations/Spanish

**Awards**

Type	Year
Commissioner's Team Award	2007(2)
Deputy Commissioner's Team Award	2010/2008/2007(2)
Associate Commissioner's Citation	2006
Associate Commissioner's Team Award	2010/2008(2)/2006
Regional Commissioner's Excellence in Service	2010
Performance Award	2014/2011/2010/2006(2)/2003/2002
Exemplary Contribution or Service Award	2014/2011/2010/2005/2004
Quality Step Increase	2012/2009/2008
On-the-Spot Award	2002

## SES Member Bios

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**Name:** LIU, Andy (Noncareer Appointee)

**Title:** General Counsel



### Previous Work History

Dates	Position Title	Organization
1988 - 1990	Engineer	General Dynamics
1990 - 1992	Research Assistant	University of Texas at Austin
1994	Public Interest Fellow	Cromwell & Moring LLP
09/95 - 12/00	Partner, White Collar & Regulatory Enforcement Group	Cromwell & Moring LLP
06/03 - 08/15	Partner, White Collar & Regulatory Enforcement Group	Cromwell & Moring LLP

### Federal Government Positions

Dates	Position	Location	Series/Grade
1993	Legal Intern	U.S. Commission on Civil Rights	
01/01 - 06/03	Trial Attorney	Dept of Justice	
08/15 -	General Counsel	SSA/OGC	SES

### Education

College/University	Degree	Year	Course of Study
Lehigh University	B.S.	1988	Mechanical Engineering
University of Texas at Austin	M.S.	1992	Mechanical Engineering
Georgetown University School of Law	J.D.	1995	

**Awards**

Type	Year



## SES Member Bios

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**Name:** LOPEZ, Joe J.

**Title:** Deputy Chief of Staff



### Previous Work History

Dates	Position Title	Organization
01/87 - 06/91	Produce Assistant	Skaggs Alpha Beta
01/89 - 06/91	Book keeper	Gabriel's Upholstery

### Federal Government Positions

Dates	Position	Location	Series/Grade
07/91 - 07/97	Claims Representative	SSA/OPNS-Dallas	GS-0105-7/9/10/11
07/97 - 12/98	Training Instructor	SSA/OPNS-Dallas	GS-0105-11
12/98 - 04/99	Lead Training Specialist	SSA/OPNS-Dallas	GS-0105-12
04/99 - 05/00	Regional Management Development Program	SSA/OPNS-Dallas	GS-0301-12
05/00 - 06/03	Assistant District Manager	SSA/OPNS-Dallas	GS-0105-13
06/03 - 12/04	District Manager	SSA/OPNS-Dallas	GS-0105-13
12/04 - 02/07	Project Manager	SSA/OPNS-Dallas	GS-0105-14
02/07 - 10/11	Deputy Area Director	SSA/OPNS-Dallas	GS-0105-14
10/11 - 07/13	Social Insurance Administrator	SSA/OPNS-Dallas	GS-0105-15
07/13 - 01/15	Area Director	SSA/OPNS-Dallas	GS-0105-15
01/15 - 09/16	SES CDP Candidate Development Program	SSA/OHR	GS-0301-15
09/16 - Present	Deputy Chief of Staff	SSA/OC	SES

**Education**

College/University	Degree	Year	Course of Study
University of Texas, El Paso	B.A.	1991	Business Administration

**Awards**

Type	Year
Performance Award	2015/2014/2011/2009/1993/1992/1991
Deputy Commissioner's Citation	2012/2009/2007
Special Act or Service Award	1998/1997/1996/1995
Exemplary Contribution or Service Award	2012/2010
Regional Commissioner Citation	2002
Quality Step Increase	2012/2006/1996

## SES Member Bios

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**Name:** LU, Natalie T.

**Title:** Deputy Associate Commissioner for Retirement Policy



### Previous Work History

Dates	Position Title	Organization
09/90 - 07/92	Teaching Assistant	University of Maryland, Baltimore County
07/92 - 08/93	Research Assistant	Center for Advanced Research in Biotechnology
09/93 - 07/95	Research Assistant	University of Maryland, Baltimore County
08/95 - 09/98	Postdoctoral Fellow	Johns Hopkins University

### Federal Government Positions

Dates	Position	Location	Series/Grade
09/98 - 03/04	Biotechnology Specialist	DoJ	GS-0401-11/12/13
12/04 - 06/05	Special Asst to the CFO	DoL/OCFO	GS-1301-13
06/05 - 03/06	Program Manager	DoJ	GS-0301-13
04/06 - 07/08	Senior Public Health Advisor	HHS	GS-0685-14
07/08 - 07/10	SES Candidate Development Program	SSA/OHR	GS-0301-15
07/10 - 11/10	Social Insurance Specialist	SSA/ORDP	GS-0105-15
11/10 - 06/11	Deputy Associate Commissioner	SSA/OQP/OQDM	GS-0340-15
06/11 - 04/12	Executive Assistant	SSA/ODAR	GS-0301-15
04/12 - 12/12	Associate Commissioner	SSA/ODAR/OESSI	SES
12/12 - 05/13	Associate Commissioner	SSA/ORDP/ODEEMP	SES
05/13 -	Deputy Associate Commissioner	SSA/ORDP/ORP	SES

### Education

College/University	Degree	Year	Course of Study
Fudan University	B.S.	1990	Chemistry
University of Maryland	Ph.D.	1995	Biochemistry/Molecular Biology

## Awards

Type	Year
Performance Award	2011/2010
U.S. Patent Award	2006
Service to America Award	2007
DHHS Secretary Award	2008
Asst Attorney General Award (DoJ)	2002
Special Act (DoJ)	2001

## SES Member Bios

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**Name:** LYTLE, Joseph

**Title:** Deputy Associate Commissioner for Budget,  
Facilities and Security



### Previous Work History

Dates	Position Title	Organization

### Federal Government Positions

Dates	Position	Location	Series/Grade
07/91 - 11/91	Claims Development Clerk	SSA/OPNS-SF	GS-0998-4/5
11/91 - 03/97	Claims Representative	SSA/OPNS-SF	GS-0105-5/7/9/11
03/97 - 08/98	Paralegal Specialist	SSA/OHA/OCALJ-Phila.	GS-0950-12
08/98 - 09/99	Program Analyst	SSA/OHA/OCALJ-Phila.	GS-0343-12
09/99 - 09/00	Administrative Officer		GS-0341-13
09/00 - 12/08	Hearing Office Director	SSA/ODAR-Phila.	GS-0950-14
12/08 - 04/09	Program Operations Officer	SSA/ODAR-Phila.	GS-0950-13
04/09 - 09/10	Regional Director of Operations & Admin.	SSA/ODAR-Phila.	GS-0343-14
09/10 - 07/11	Division Director, Administrative Services	SSA/ODAR/OCALJ	GS-0301-15
07/11 - 10/12	Executive Assistant	SSA/ODAR/OCALJ	GS-0301-15
10/12 - 01/15	Director, Material Resources	SSA/OBFS	GS-0342-15
01/15 - 09/16	SES CDP Candidate Development Program	SSA/OHR	GS-0301-15
09/16 -	Deputy Associate Commissioner	SSA/OBFQM/OBFS	SES

### Education

College/University	Degree	Year	Course of Study
Cheney University	B.S.	1991	Business Administration

College/University	Degree	Year	Course of Study
Widener University School of Law	J.D.	2001	Law
Strayer University	M.S.	2012	Leadership

## Awards

Type	Year
Deputy Commissioner's Citation	2012
Recognition of Contribution Award	2012/2011/2010/2007/2006/2005-2004-2003/2001/200/1999/1998/1995/1994/1993/1992
Performance Award	2012/2011/2010/2009/2006/2001/2000/1997/1993
Commissioner's Citation	2011

## SES Member Bios

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**Name:** MARSHALL, Lydia C.

**Title:** Associate Commissioner for Personnel



### Previous Work History

Dates	Position Title	Organization
09/86 - 03/89	Legal Secretary	Venable, Baetjer & Howard
03/89 - 08/89	Legal Secretary	Whiteford, Taylor & Preston
08/89 - 04/94	Legal Secretary	Steptoe & Johnson

### Federal Government Positions

Dates	Position	Location	Series/Grade
04/94 - 04/99	Social Insurance Specialist	SSA/OPNS-Phila	GS-0105-7/9/11
04/99 - 01/00	Managerial Associate Intern	SSA/OPNS-Phila	GS-0301-12
01/00 - 03/00	Social Insurance Specialist	SSA/OPNS-Phila	GS-0105-11
03/00 - 10/01	Leadership Development Program	SSA/OPNS-Phila	GS-0301-11/12
10/01 - 07/02	Employee Development Specialist	SSA/OHR/OT	GS-0235-13
07/02 - 04/06	Human Resources Specialist	SSA/OHR/OT	GS-0201-13/14
04/06 - 07/08	Supvy Human Resources Specialist	SSA/OHR/OT	GS-0201-15
07/08 - 07/10	SES Candidate Development Program	SSA/OHR	GS-0301-15
07/10 - 09/11	Deputy Associate Commissioner	SSA/OBFM/OPLM	GS-0301-15
09/11 - 05/13	Deputy Associate Commissioner	SSA/OBFM/OFSM	SES
05/13 - 09/16	Associalte Commissioner	SSA/OHR/OL	SES
09/16 -	Associate Commissioner	SSA/OHR/OPE	SES

### Education

College/University	Degree	Year	Course of Study
Morgan State University	B.S.	1993	Business Management

## Awards

Type	Year
Commissioner's Team Award	2005
SES Performance Bonus	2014/2013
Deputy Commissioner's Citation	2006/2004
Deputy Commissioner's Team Award	2007/2006
Quality Step Increase	2011/2009/2003
Performance Award	2008/2006/2005
Exemplary Contribution or Service Award	2007
Special Act or Service Award	2004/2001
On-the-Spot Award	2005/2003



## SES Member Bios

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**Name:** MARTINEZ, William M.

**Title:** Associate Commissioner for IT Programmatic  
Business Support



### Previous Work History

Dates	Position Title	Organization

### Federal Government Positions

Dates	Position	Location	Series/Grade
06/87 - 09/87	Summer Aide	SSA/OPNS-Denver	YV-3506
06/88 - 09/88	Summer Aide	SSA/OPNS-Denver	YV-3506
11/88 - 01/92	Clerk	SSA/OPNS-Denver	GS-0303-1/2/3/4
01/92 - 02/94	Student Trainee	SSA/OPNS-Denver	GS-0199-4/5
02/94 - 03/99	Social Insurance Specialist	SSA/OPNS-Denver	GS-0105-7/9/11/12
03/99 - 05/05	District Manager	SSA/OPNS-Kansas City	GS-0105-13/14
05/05 - 07/08	Supvy Management Analust	SSA/OPNS-Kansas City	GS-0343-14
07/08 - 07/10	SES Candidate Development Program	SSA/OHR	GS-0301-15
07/10 - 09/10	Deputy Assistant Associate Commissioner	SSA/OPNS/OCO-ODO	GS-0105-15
09/10 - 06/13	Deputy Assistant Associate Commissioner	SSA/OPNS/OCO-OIO	GS-0105-15

Dates 06/13 - 11/14	Position Assistant Associate Commissioner	Location SSA/OPNS/OCO-OIO	Series/Grade SES
11/14 - 05/16	Deputy Associate Commissioner	SSA/OPNS/OCO	SES
05/16 - 09/16	Senior Advisor	SSA/OS	SES
09/16 -	Associate Commissioner	SSA/OS/OITPBS	SES

## Education

College/University	Degree	Year	Course of Study
University of Utah	B.S.		Sociology
University of Phoenix	M.A.		Organizational Management

## Awards

Type	Year
Commissioner's Citation	2011
SES Performance Bonus	2014/2013
Performance Award	2012/2011/2010/2009/2008/2006/2005/2000
Associate Commissioner's Citation	2001
Special Act or Service Award	2006/2004/2003/2002/1999
Commissioner's Team Award	2001
Associate Commissioner's Team Award	2007

## SES Member Bios

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**Name:** MAURIN, Frederick M.

**Title:** Regional Commissioner, New York



### Previous Work History

Dates	Position Title	Organization

### Federal Government Positions

Dates	Position	Location	Series/Grade
12/72 - 06/75	Claims Representative	SSA/OPNS-NY	GS-0105-7/9/11
06/75 - 11/77	Operations Supervisor	SSA/OPNS-NY	GS-0105-11
11/77 - 06/80	Operations Officer	SSA/OPNS-NY	GS-0105-12
06/80 - 04/81	Social Insurance Specialist	SSA/OPNS-NY	GS-0105-12
04/81 - 06/84	Assistant District Manager	SSA/OPNS-NY	GS-0105-12
06/84 - 12/85	Operations Officer	SSA/OPNS-NY	GS-0105-12
12/85 - 02/91	Assistant District Manager	SSA/OPNS-NY	GS-0105-13
02/91 - 12/92	District Manager	SSA/OPNS-NY	GS-0105-14
12/92 - 03/11	Area Director	SSA/OPNS-NY	GS-0105-14/15
03/11 - 07/14	Deputy Regional Commissioner	SSA/OPNS-NY	SES
07/14 -	Regional Commissioner	SSA/OPNS-NY	SES

### Education

College/University	Degree	Year	Course of Study
State College of New York, Albany	B.A.		English/Education

**Awards**

Type	Year
Commissioner's Citation	2001
Deputy Commissioner's Citation	2006/1998
Regional Commissioner's Citation	1991
SES Performance Bonus	2014/2013/2011
Performance Award	2008/2007(2)/2006/2005/2004/2003/2001/1999/1995
Quality Step Increase	2001/1999/1977
Special Act or Service Award	1998/1997/1996/1995/1994/1993

## SES Member Bios

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**Name:** MEDLEY-PROCTOR, Kristen N.

**Title:** Executive Director, Office of Strategic Human  
Capital Management



### Previous Work History

Dates	Position Title	Organization
08/96 - 09/99	Research Assistant	George Washington University

### Federal Government Positions

Dates	Position	Location	Series/Grade
02/96 - 05/97	Personnel Management Specialist	DOI/OPE	GS-0201-07
05/97 - 08/97	Personnel Management Specialist	DOL	GS-0299-07
02/00 - 04/02	Personnel Research Psychologist	OPM	GS-0199-11/12
02/03 - 11/04	Personnel Research Psychologist	OPM	GS-0199-13
11/04 - 04/06	Human Resources Specialist	SSA/OHR/HCPS	GS-0201-13
04/06 - 05/08	Program Manager	SSA/OHR/HCPS	GS-0343-14
05/08 - 08/08	Deputy Director	SSA/OHR/HCPS	GS-0343-15
08/08 - 07/10	SES Candidate Development Program	SSA/OHR	GS-0301-15
07/10 - 09/13	Deputy Associate Commissioner	SSA/OHR/OPE	SES
09/13 - 01/15	Executive Director	SSA/OHR/OSHCM	SES
01/15 - 07/16	Associate Commissioner	SSA/OHR/OPE	SES
07/16 -	Executive Director	SSA/OHR/OSHCM	SES

### Education

College/University	Degree	Year	Course of Study
Hampton University	B.A.	1995	Psychology

College/University	Degree	Year	Course of Study
George Washington University	Ph.D.	2005	Organizational Psychology

## Awards

Type	Year
SES Performance Bonus	2014/2013
Deputy Commissioner's Citation	2006
Performance Award	2008
Quality Step Increase	2007
Commendable Act or Service Award	2006/2005
Sustained Superior Performance	2004/2003/2002/2001
On-the-Spot Award	2001/2000/1995

## SES Member Bios

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**Name:** MIN, Royce B.

**Title:** Assistant Deputy Commissioner for Legislation  
and Congressional Affairs



### Previous Work History

Dates	Position Title	Organization
06/97 - 03/99	Legal Assistant	Collier Shannon Rill & Scott
06/01 - 08/01	Summer Associate	Davis Polk & Wardwell
10/03 - 09/04	Associate Attorney	Wilmer Cutler Pickering Hale & Dorr

### Federal Government Positions

Dates	Position	Location	Series/Grade
06/00 - 08/00	Intern	EEOC-NY	
08/02 - 08/03	Judicial Clerk	US Court of Appeals	JSP-11/12
10/04 - 07/08	Attorney Advisor	Dept of State	GS-0905-13/14/15
07/08 - 01/12	General Attorney	SSA/OGC/OPL	GS-0905-14/15
01/12 - 01/13	SES Candidate Development Program	SSA/OHR	GS-0905-15
01/13 - 02/13	Deputy Associate Commissioner	SSA/OLCA/OLDO	SES
02/13 - 07/15	Associate Commissioner	SSA/OLCA/OLDO	SES
07/15 -	Assistant Deputy Commissioner	SSA/OLCA	SES

### Education

College/University	Degree	Year	Course of Study
University of Chicago	B.A.	1997	Political Science
Cornell Law School	J.D.	2002	

**Awards**

Type	Year
SES Performance Bonus	2014/2013
Deputy Commissioner's Citation	2012
Performance Award	2011/2010/2009
Commissioner's Team Award	2010
Associate Commissioner's Citation	2010(2)
General Counsel's Citation	2010(2)



## SES Member Bios

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**Name:** MOLANDER, Christopher P.

**Title:** Associate Commissioner for Facilities and Supply Management



### Previous Work History

Dates	Position Title	Organization

### Federal Government Positions

Dates	Position	Location	Series/Grade
11/73 - 05/79	Accounting Technician	HHS/SSA/FMB	GS-0525-4/5/6/7
05/79 - 06/80	Lead Accounting Technician	HHS/SSA/OMB	GS-0525-7
06/80 - 10/87	Operating Accountant	HHS/SSA/OMB	GS-0510-9/11/12
10/87 - 01/88	Supvy Fiscal Management Analyst	HHS/SSA/OMB	GS-0501-13
01/88 - 10/88	Operating Accountant	HHS/SSA/OMB	GS-0510-13
10/88 - 06/91	Supvy Operating Accountant	HHS/SSA/OCFO	GS-0510-13
06/91 - 10/99	Supvy Operating Accountant	SSA/OFAM/OFPO	GS-0510-13/14
10/99 - 12/03	Division Director	SSA/OFAM/OFPO	GS-0510-15
12/03 - 01/09	Supvy Financial Management Analyst	SSA/OFAM/OFPO	GS-0501-15
01/09 - 10/09	Office Director	SSA/OBFM/OSS	GS-0501-15
10/09 - 04/10	Deputy Associate Commissioner	SSA/OBFM/OFM	SES
04/10 - 07/11	Senior Advisor	SSA/OBFM	SES
07/11 - 05/13	Deputy Associate Commissioner	SSA/OBFM/OFPO	SSES
05/13 - 08/14	Deputy Associate Commissioner	SSA/OBFM/OFSM	SES
08/14 -	Associate Commissioner	SSA/OBFM/OFSM	SES

**Education**

College/University	Degree	Year	Course of Study
Towson University	B.A.	1983	Accounting
University of Baltimore	M.P.A.	1988	

**Awards**

Type	Year
SES Performance Bonus	2014
Performance Award	2008/2003/2002/2001/2000/1998/1997(2)/1996/1992/ 1991/1990/1989/1988(2)
Quality Step Increase	2006/2005/2004/1995
Special Act or Service Award	2006/2005/1994/1993/1991/1990(2)
Exemplary Contribution or Service Award	2009/2007

## SES Member Bios

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**Name:** MONCADA, Kirsten J.

**Title:** Executive Director for Privacy and Disclosure



### Previous Work History

Dates	Position Title	Organization

### Federal Government Positions

Dates	Position	Location	Series/Grade
11/88 - 02/90	Attorney Advisor	Dept of Energy	GS-0905-9/11
02/90 - 06/99	Senior Attorney Advisor	Dept of Justice	GS-0905-12/13/14/15
06/99 - 03/06	Associate Director, Information and Privacy	Dept of Justice	GS-0905-15
03/06 - 08/12	Director, Privacy and Civil Liberties	Dept of Justice	GS-0905-15
08/12 -	Executive Director	SSA/OGC/OPD	SES

### Education

College/University	Degree	Year	Course of Study
University of Maryland, College Park	B.A.	1985	English
University of Maryland School of Law	J.D.	1988	

### Awards

Type	Year
	2005

Type	Year
Award for Excellence - Law & Litigation, President's Council on Integrity and Efficiency	
Bronze Medal for Commendable Service (EPA)	2005
SES Performance Bonus	2014
Attorney General's Award for Distinguished Service	2001

## SES Member Bios

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**Name:** MORADO, David F.

**Title:** Regional Chief Counsel, Seattle



### Previous Work History

Dates	Position Title	Organization

### Federal Government Positions

Dates	Position	Location	Series/Grade
10/74 - 09/78		U.S. Army	
01/79 - 12/86	Attorney Advisor	SBA-Seattle	GS-0905-12
12/86 - 01/95	Supvy Attorney Advisor	SBA-Seattle	GS-0905-13/14
01/95 - 06/07	Supvy Attorney Advisor	HUD-Seattle	GS-0905-15
06/07 -	Regional Chief Counsel	SSA/OGC-Seattle	SES

### Education

College/University	Degree	Year	Course of Study
Purdue University	B.S.	1971	
Indiana University	J.D.	1974	
City University - Bellevue, WA	M.P.A.	1986	
City University - Bellevue, WA	M.B.A.	1987	

### Awards

Type	Year
SES Performance Bonus	2014/2008
Outstanding Performance Award (HUD)	2006/2005/2004/2003/2002/2001/2000/1999/1998/1997/1996/1995
Army's Legion of Merit	2004
Military Outstanding Volunteer Service Medal	2004

Type	Year
Outstanding Performance (SBA)	1994
Outstanding Veterans Affairs Officer	1991
General Counsel Award (SBA)	1989

## SES Member Bios

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**Name:** MORENZ, John C.

**Title:** Chief Technology Officer



### Previous Work History

Dates	Position Title	Organization
06/83 - 01/85	Unix Systems Administrator	ARINC Corporation
01/85 - 01/86	Computer Programmer	Unisys Corporation
01/86 - 01/89	Computer Systems Engineer	Planning Research Corporation

### Federal Government Positions

Dates	Position	Location	Series/Grade
01/89 - 12/96	Computer Specialist	GSA	GS-0334-11/12/13
12/96 - 05/01	Computer Specialist	SSA/OS/OSDD	GS-0344-12/13
05/01 - 06/02	Lead Computer Specialist	SSA/OS/OITA	GS-0334-13
06/02 - 06/06	Supvy IT Specialist	SSA/OS/OESAE	GS-2210-14/15
06/06 - 08/08	Division Director	SSA/OS/OESAE	GS-2210-15
08/08 - 03/10	SES Candidate Development Program	SSA/OHR	GS-0301-15
03/10 - 04/10	Asst Associate Commissioner for Enterprise IT Services Management	SSA/OS/OTSO	SES
04/10 - 05/12	Deputy Associate Commissioner	SSA/OS/OESAE	SES
05/12 - 04/15	Associate Commissioner	SSA/OS/OESAE	SES
04/15 - 08/15	Deputy Chief Technology Officer	SSA/OCTO	SES
08/15 -	Chief Technology Officer	SSA/OS	SES

### Education

College/University	Degree	Year	Course of Study
Anne Arundel Community College	A.A.	1997	Information Systems Management

### Awards

Type	Year
Commissioner's Citation	
Government Computer News Leadership Award	
SES Performance Bonus	2014/2013
Quality Step Increase	2008/2006
Performance Award	2009/2006/2005/2004/2003/2002/2001/2000/1999/1998/1996/1995/1994/1993/1992/1991/1989
Exemplary Contribution or Service Award	2007
Special Act or Service Award	2000/1997/1996/1994/1993/1992/1990/1989
Deputy Commissioner's Citation	
Associate Commissioner's Citation	



## SES Member Bios

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**Name:** MOYA, Rafael H.

**Title:** Associate Commissioner for Anti-Fraud Programs



### Previous Work History

Dates	Position Title	Organization

### Federal Government Positions

Dates	Position	Location	Series/Grade
06/91 - 05/94	Personnel Staffing Specialist	SSA/OPNS-San Francisco	GS-0201-4/5/7/9/11/12
06/94 - 05/96	HR/LR Specialist	SSA/OPNS-San Francisco	GS-0201-12
05/96 - 07/99	Claims Representative (Bilingual)	SSA/OPNS-San Francisco	GS-0105-11
07/99 - 01/01	Employee Relations Specialist	SSA/OPNS-San Francisco	GS-0230-12
01/01 - 05/03	Operations Supervisor	SSA/OPNS-San Francisco	GS-0105-12
05/03 - 06/05	Branch Manager	SSA/OPNS-San Francisco	GS-0105-13
06/05 - 01/08	District Manager	SSA/OPNS-San Francisco	GS-0105-14
01/08 - 02/09	Northern Deputy Area Director	SSA/OPNS-San Francisco	GS-0105-14
03/09 - 01/15	Bay Area Director	SSA/OPNS-San Francisco	GS-0105-15
01/15 - 09/16	SES Candidate Development Program	SSA/OHR	GS-0301-15
10/16 -	Associate Commissioner	SSA/OBFQM/OAFP	SES

### Education

College/University	Degree	Year	Course of Study

College/University	Degree	Year	Course of Study
San Jose State University	BS	1991	Public Administration
University of Phoenix	MBA	2009	Business Administration

## Awards

Type	Year
Exemplary Contribution or Service Award	2015/2012/2010
Performance Award	2014/2012/2011/2009/1998/1997/1996/1993
Outstanding Regional Executive Award	2013/2012/2011
Regional Commissioner's Citation	2011/2005/2000
Commissioner's Citation	2009
Special Act or Service Award	1998/1996/1994

## SES Member Bios

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**Name:** OWEN, John C.

**Title:** Associate Commissioner for Disability

**Determinations**



### Previous Work History

Dates	Position Title	Organization
01/97 - 06/99	Disability Adjudicator	Alaska Disability Determination Services
06/99 - 09/07	Disability Adjudicator II	Alaska Disability Determination Services

### Federal Government Positions

Dates	Position	Location	Series/Grade
09/07 - 12/08	Program Analyst	SSA/OPNS/ODD	GS-0343-13
12/08 - 12/11	Deputy Division Director	SSA/OPNS/ODD	GS-0105-14
12/11 - 04/12	Technical Advisor	SSA/OPNS/ODD	GS-0105-14
04/12 - 01/15	Senior Advisor	SSA/OPNS/ODD	GS-0105-15
01/15 - 09/16	SES Candidate Development Program	SSA/OHR	GS-0301-15
09/16 -	Deputy Associate Commissioner	SSA/OS	SES
10/16 -	Associate Commissioner	SSA/OPNS/ODD	SES

### Education

College/University	Degree	Year	Course of Study
Oregon State University	B.A.	1995	English

### Awards

Type	Year
Performance Award	2015/2012/2011/2010/2009
Quality Step Increase	2014/2009
Exemplary Contribution or Service Award	2011
Deputy Commissioner Team Award	2009

## SES Member Bios

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**Name:** PACE, Gregory C.

**Title:** Senior Advisor to the Deputy Commissioner



### Previous Work History

Dates	Position Title	Organization
06/68 - 05/69	Lab Technician	Revere Cooper & Brass, Inc.
06/69 - 10/71	Senior Draftsman	Johnson Controls, Inc.
11/71 - 01/74	Programmer Analyst	Maryland Casualty Insurance Company

### Federal Government Positions

Dates	Position	Location	Series/Grade
01/74 - 10/78	Computer Specialist	SSA	GS-0334-9/11/12
10/78 - 06/80	Computer Specialist	SSA	GS-0334-12
07/80 - 03/88	Supvy Computer Systems Analyst	SSA	GS-0334-13/14/15
03/88 - 11/94	Senior Systems Analyst	SSA	GS-0334-15
11/94 - 07/02	Deputy Director, Systems Planning and Integration	SSA	SES
07/02 - 05/05	Deputy Associate Commissioner	SSA/OS/OESAE	SES
05/05 - 07/11	Deputy Chief Information Officer	SSA/OCIO	SES
07/11 -	Senior Advisor to the Deputy Commissioner	SSA/OC	SES

### Education

College/University	Degree	Year	Course of Study
Community College of Baltimore	A.A.	1972	

## Awards

Type	Year
Presidential Rank Award - Meritorious	2010
Commissioner's Citation	2004/1992
Deputy Commissioner's Citation	1994
SES Performance Bonus	2014/2013/2011/2009/2008/2007/2006/2005/2004/2003
Special Act or Service Award	1994/1992/1991/1989/1977
Performance Award	1993/1992/1991/1990/1989/1986/1985/1984
On-the-Spot Award	1990

## SES Member Bios

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**Name:** PAGAN, Robert

**Title:** Deputy Regional Commissioner, Dallas



### Previous Work History

Dates	Position Title	Organization

### Federal Government Positions

Dates	Position	Location	Series/Grade
01/84 - 06/89	Social Insurance Representative	SSA/OPNS-Chicago	GS-0105-5/7/9/10
06/89 - 12/90	Supvy Social Insurance Representative	SSA/OPNS-Chicago	GS-0105-11
12/90 - 02/91	Social Insurance Specialist	SSA/OPNS-Chicago	GS-0105-11/12
02/91 - 05/92	Staff Assistant	SSA/OPNS-Chicago	GS-0105-12
05/92 - 03/95	Branch Manager	SSA/OPNS-Chicago	GS-0105-12
03/95 - 12/98	District Manager	SSA/OPNS-Chicago	GS-0105-13/14
12/98 - 11/99	Advanced Leadership Program	SSA/OHR	GS-0301-14/15
11/99 - 10/09	Area Director	SSA/OPNS-Chicago	GS-0105-15
10/09 - 10/11	SES Candidate Development Program	SSA/OHR	GS-0301-15
10/11 - 02/13	Management Analyst Officer	SSA/OPNS-Chicago	GS-0343-15
02/13 - 05/14	Social Insurance Administrator	SSA/OPNS-Chicago	GS-0105-15
05/14 -	Deputy Regional Commissioner	SSA/OPNS-Dallas	SES

### Education

College/University	Degree	Year	Course of Study
Bowling Green University	B.S.	1981	Business Administration

### Awards

Type	Year
Commissioner's Citation	2007

Type	Year
Commissioner's Team Award	2010
Quality Service Team Award	2007
Performance Award	2010/2008/2006/2005/2003/1998
Quality Step Increase	2009/2006
Exemplary Contribution or Service Award	2012(2)/2011
Special Act or Service Award	2004/2002/2001/1997/1996/1995(2)
Associate Commissioner's Citation	2006

## SES Member Bios

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**Name:** PALMER, J. Jioni (Noncareer Appointee)

**Title:** Associate Commissioner for External Affairs



### Previous Work History

Dates	Position Title	Organization
06/99 - 09/04	Long Island Desk and Albany Bureau Reporter	Newsday, Inc.
09/04 - 02/07	Congressional Correspondent	Newsday, Inc.
07/08 - 01/09	National Press Secretary	Media Matters for America
02/09 - 12/10	Communications Director	Congressional Black Caucus

### Federal Government Positions

Dates	Position	Location	Series/Grade
03/07 - 07/08	Press Secretary	U.S. House of Reps/Committee on Ways and Means	
01/11 - 03/15	Deputy Chief Policy Officer	PBGC	
03/15 -	Associate Commissioner	SSA/OCOMM/OEA	SES

### Education

College/University	Degree	Year	Course of Study
University of California, Los Angeles	B.A.		African American Studies

### Awards

Type	Year
Excellence in Performance Award (PBGC)	2012



## SES Member Bios

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**Name:** PARRY, Dan C.

**Title:** Associate Commissioner for Enterprise Support  
Architecture and Engineering



### Previous Work History

Dates	Position Title	Organization
08/83 - 06/85	Computer Specialist	Compaq Inc.
06/85 - 09/86	Programmer Analyst	Ford Aerospace/NASA Goddard
09/86 - 01/92	Computer Specialist	Hadron, Inc/Johns Hopkins Applied Physics Lab
01/92 - 09/95	Computer Specialist	Lockheed Martin/SSA

### Federal Government Positions

Dates	Position	Location	Series/Grade
09/95 - 10/96	Systems Programmer	SSA/OS	GS-0334-13
10/96 - 08/87	Systems Analyst	SSA/OS	GS-0334-13
08/97 - 06/02	Branch Chief	SSA/OS	GS-0334-14/15
06/02 - 01/12	Division Director	SSA/OS/OESAE	GS-2210-15
01/12 - 02/13	SES Candidate Development Program	SSA/OHR	GS-0301-15
02/13 - 04/15	Asst Associate Commissioner for Infrastructure Architecture and Configuration	SSA/OS/OTSO	SES
04/15 -	Associate Commissioner	SSA/OS/OESAE	SES

### Education

College/University	Degree	Year	Course of Study
Indiana University of Pennsylvania	B.S.	1983	Computer Science
Johns Hopkins University	M.S.	1988	Computer Science

### Awards

Type	Year
Commissioner's Citation	2011/2010/2009

Type	Year
Commissioner's Team Award	2010
SES Performance Bonus	2014
Deputy Commissioner's Team Award	2009
Associate Commissioner's Citation	2010/2005/2004/2003/2000/1997/1996
Performance Award	2011/2010/2009/2008/2000/1996
Quality Step Increase	2007/2000/1997/1996
Special Act or Service	2006/2005/2004/2003/2002/2001/1999(2)/1998(2)/1997
On-the-Spot Award	1999

## SES Member Bios

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**Name:** PATINELLA, Ralph A.

**Title:** Deputy Associate Commissioner for Labor-  
Management  
and Employee Relations



### Previous Work History

Dates	Position Title	Organization

### Federal Government Positions

Dates	Position	Location	Series/Grade
06/76 - 12/78	Summer Aide	SSA/OMA	YV-3506
12/78 - 01/81	Access Coop Student Trainee	SSA/OMA	GS-0099-4
01/81 - 12/89	Personnel Management Specialist	SSA/OMB/OHR	GS-0201-7/9/11/12/13
05/90 - 12/98	Labor Relations Specialist	SSA/OM/OHR	GS-0233-12/13
12/98 - 12/01	National AFGE Contract Coordinator	SSA/OHR/OLMER	GS-0233-14
06/02 - 12/06	Center Director, Operations and Negotiations	SSA/OHR/OLMER	GS-0233-15
12/06 - 08/12	Senior Policy Advisor	SSA/OHR/OLMER	GS-0201-15
08/12 -	Deputy Associate Commissioner	SSA/OHR/OLMER	SES

### Education

College/University	Degree	Year	Course of Study
Towson State University	B.S.	1981	Business Administration/Mass Communications
University of Baltimore	M.B.A.	1990	

### Awards

Type	Year
Commissioner's Team Award	2007/2006/2003/2002/2001
SES Performance Bonus	2014/2013
Performance Award	2012/2011/2010/2004/2002/2001/200/1997/1996/1995/1992/ 1991/1988(2)
Quality Step Increase	2009/2008/2005/1993
Special Act or Service Award	1998/1995/1994/1993/1992/1991

## SES Member Bios

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**Name:** PATRICK, Steven L.

**Title:** Associate Commissioner for Public Inquiries



### Previous Work History

Dates	Position Title	Organization
1979 - 1985	Co-Founder/Director	Logotherapy Counseling Center
1987 - 1992	Asst Professor of Management	George Washington University

### Federal Government Positions

Dates	Position	Location	Series/Grade
06/91 - 12/92	Management Analyst	Defense Logistics Agency	GS-0343-13
12/92 - 03/03	Human Resources Specialist	Defense Logistics Agency	GS-0201-14
03/03 - 01/04	Supvy Management Analyst	Defense Logistics Agency	SV-K/J
01/04 - 03/08	Supvy Human Resources Specialist	GPO	PG-0201-15
03/08 - 05/13	Associate Commissioner	SSA/OHR/OL	SES
05/13 -	Associate Commissioner	SSA/OCOMM/OPI	SES

### Education

College/University	Degree	Year	Course of Study
University of Georgia	B.A.		Political Science
University of Georgia	M.Ed.		Mental Health/Rehab Counseling
University of Georgia	M.B.A.		Management
University of Georgia	Ph.D.		Organizational Communication

### Awards

Type	Year
SES Performance Bonus	2014/2010/2009

## SES Member Bios

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**Name:** PELGRO, Michael J.

**Title:** Regional Chief Counsel (Boston)

### Previous Work History

Dates	Position Title	Organization
1979-1983	Litigation Associate	Mintz, Levin, Cohn, Ferris, Glovsky & Popeo, P.C.
1983-1989	Assistant District Attorney	Middlesex District Attorney's Office
2007-2012	Counsel	Foley Hoag, LLP
2012-2013	Adjunct Professor	Massachusetts Bay Community College
2012-2016	First Assistant District Attorney	Middlesex District Attorney's Office
2014-Present	Adjunct Professor of Law	Boston College Law School

### Federal Government Positions

Dates	Position	Location	Series/Grade
1989-2007	Assistant U.S. Attorney	United States Attorney Office/DOJ	GS-0905-15
2016-	Regional Chief Counsel	SSA/OGC-Boston	SES

### Education

College/University	Degree	Year	Course of Study
Boston College	A.B.	1976	History
Boston College Law School	J.D.	1979	

### Awards

Type	Year

## SES Member Bios

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**Name:** PHILLIPS, John W. R.

**Title:** Associate Commissioner for Research, Evaluation  
and Statistics



### Previous Work History

Dates	Position Title	Organization
08/87 - 06/92	Account Executive	AT&T

### Federal Government Positions

Dates	Position	Location	Series/Grade
08/92 - 07/97	Pre-Doctoral Fellow	National Institute of Aging	
07/97 - 07/99	Post-Doctoral Fellow	National Institute of Aging	
08/99 - 04/04	Economist	SSA/Policy	GS-0110-13/14
05/04 - 04/08	Health Scientist Administrator	National Institute of Aging	GS-14
05/08 - 05/09	Chief, PSP	National Institute of Aging	GS-15
06/09 - 12/10	Director, Office of Policy Research	SSA	GS-15
01/11 - 05/14	Health Scientist Administrator	National Institute of Aging	GS-15
06/14 - 02/16	Chief, PSP	National Institute of Aging	GS-15
02/16 -	Associate Commissioner	SSA/ORDP/ORES	SES

### Education

College/University	Degree	Year	Course of Study
Syracuse University	B.A.	1987	Economics and Marketing
Syracuse University	M.A.	1996	Economics
Syracuse University	Ph.D.	1997	Economics

### Awards

Type	Year

## SES Member Bios

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**Name:** POSTELL, Claudia J.

**Title:** Deputy Associate Commissioner for Civil Rights  
and Equal Opportunity



### Previous Work History

Dates	Position Title	Organization
02/95 - 03/96	Staff Attorney	DC Dept of Consumer and Regulatory Affairs
03/96 - 02/97	Senior Attorney	Law Office of Neal and Postell
02/04 - 08/07	Director of Operations	The Training Center, LLC

### Federal Government Positions

Dates	Position	Location	Series/Grade
08/07 - 08/09	Chief Diversity/EEO Officer	VA	GS-0260-14
08/09 - 01/15	Director, Diversity and Inclusion	NSF	SES
01/15 -	Deputy Associate Commissioner	SSA/OHR/OCREO	SES

### Education

College/University	Degree	Year	Course of Study
Clark/Atlanta University	B.A.	1981	Communications
David A. Clark Law School	J.D.	2002	

### Awards

Type	Year



## SES Member Bios

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**Name:** RAY, Gerald K.

**Title:** Deputy Executive Director, Office of Appellate Operations



### Previous Work History

Dates	Position Title	Organization

### Federal Government Positions

Dates	Position	Location	Series/Grade
08/77 - 10/80	Social Insurance Claims Examiner	SSA/OCO-ODO	GS-0993-5/7/9/10
10/80 - 01/89	Paralegal Specialist	SSA/OHA	GS-0950-59/11/12/13
01/89 - 09/96	Branch Chief	SSA/OHA	GS-0950-14
09/96 - 04/01	Administrative Appeals Judge	SSA/OHA	GS-0905-15
04/01 - 03/09	Administrative Appeals Judge	SSA/ODAR/OAO	AA-0905-4/5/6
03/09 -	Deputy Executive Director	SSA/ODAR/OAO	SES

### Education

College/University	Degree	Year	Course of Study
Pennsylvania State University	B.A.	1976	Political Science
University of Maryland School of Law	J.D.	1985	

### Awards

Type	Year
Presidential Rank Award - Distinguished	2014
Commissioner's Team Award	2009
SES Performance Bonus	2013/2011/2010/2009
Quality Step Increase	200/1997/1985
Special Act or Service Award	1998/1997/1996/1995/1993/1992/1991/1990/1989/1988/1988 (2)

Type	Year
Performance Award	1998/1996/1995/1993/1992/1991/1990/1989/1988(2)/1987

## SES Member Bios

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**Name:** RENO, Virginia P. (Noncareer Appointee)

**Title:** Deputy Commissioner for Retirement and Disability Policy



### Previous Work History

Dates	Position Title	Organization
02/92 - 05/96	Project Director, Disability Income Project	National Academy of Social Insurance
06/96 - 02/15	Vice President for Income Security Policy	National Academy of Social Insurance

### Federal Government Positions

Dates	Position	Location	Series/Grade
1981 - 1987	Director, Policy Analysis Staff	SSA	
1987 - 1989	Staff Director	Social Security Policy Council	
08/89 - 01/92	Deputy Director, Social Security Policy	Advisory Council on Social Security	
02/15 -	Deputy Commissioner	SSA/ORDP	SES

### Education

College/University	Degree	Year	Course of Study
University of Oregon	B.A.		

### Awards

Type	Year
Commissioner's Citation	1985

## SES Member Bios

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**Name:** RICHARDSON, Samara A.

**Title:** Associate Commissioner for Income Security Programs



### Previous Work History

Dates	Position Title	Organization
07/91 - 01/93	Systems Support Specialist	Gallagher Woodsmall Inc.
01/93 - 12/94	Risk Management Specialist	Thomas McGee & Sons

### Federal Government Positions

Dates	Position	Location	Series/Grade
07/96 - 09/99	Claims Representative	SSA/OPNS-Seattle	GS-0105-7/9/11
09/99 - 04/01	Social Insurance Claims Specialist	SSA/OPNS-Boston	GS-0105-11
04/01 - 05/02	Managerial Associate Intern	SSA/OPNS-Boston	GS-0301-12
05/02 - 10/04	Program Analyst	SSA/OPNS/OAS	GS-0343-12/13
10/04 - 08/05	Legislative Fellow	U.S. House of Reps	
08/05 - 07/09	Program Analyst	SSA/OPNS/OAS	GS-0343-14
07/09 - 09/09	Project Leader	SSA/OPNS/OES	GS-0343-15
09/09 - 01/12	Supvy Program Analysis Officer	SSA/OPNS/OES	GS-0343-15
01/12 - 01/14	SES Candidate Development Program	SSA/OHR	GS-0301-15
01/14 - 11/14	Acting Deputy Associate Commissioner	SSA/OBFQM/OFSM	GS-0343-15
11/14 - 09/15	Acting Deputy Associate Commissioner	SSA/ORDP/OISP	GS-0343-15
09/15 - 05/16	Deputy Associate Commissioner	SSA/ORDP/OISP	SES
05/16 -	Associate Commissioner	SSA/ORDP/OISP	SES

### Education

College/University	Degree	Year	Course of Study
St. Francis Xavier University	B.A.	1991	International Relations
Georgetown University	Certificate	2005	Legislative Studies

College/University	Degree	Year	Course of Study
American University	Certificate	2014	Key Executive Leadership Program

## Awards

Type	Year
Commissioner's Citation	2008
Deputy Commissioner's Citation	2012/2005/204(2)/2003
Associate Commissioner's Citation	2009/2008/2005
Performance Award	2011/2009/2004
Special Act or Service Award	2010/2008/2006/2003(2)
Quality Step Increase	2005
On-the-Spot Award	2002

## SES Member Bios

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**Name:** RIVERS, Kenneth H.

**Title:** Associate Commissioner for Telephone Services



### Previous Work History

Dates	Position Title	Organization
1974 - 2009Row 3-1	Director/General Manager	AT&T Government Solutions

### Federal Government Positions

Dates	Position	Location	Series/Grade
07/09 - 02/11	Center Director	SSA/OPNS/OTS	GS-0343-15
02/11 - 08/13	Deputy Associate Commissioner	SSA/OPNS/OTS	SES
08/13 -	Associate Commissioner	SSA/OPNS/OTS	SES

### Education

College/University	Degree	Year	Course of Study
University of Phoenix	B.S.	1992	Business Administration
Averette College	M.A.	2004	Organizational Management

### Awards

Type	Year
AT&T Government Solutions Gold Club Achievement Award for Outstanding Performance	2006
Performance Award	2010

## SES Member Bios

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**Name:** ROBERT, Ann P.

**Title:** Assistant Regional Commissioner for Management  
Operations Support



### Previous Work History

Dates	Position Title	Organization
11/81 - 06/83	Disability Claims Adjudicator	Springfield, IL
1986 - 1991	Attorney	Private Practice
1991 - 2003	Attorney	Scott & Scott
04/03 - 12/11	Deputy Director	Disability Determination Services, Springfield, IL

### Federal Government Positions

Dates	Position	Location	Series/Grade
12/11 - 01/13	SES Candidate Development Program	SSA/OHR	GS-0301-15
01/13 - 10/14	Acting Associate Commissioner	SSA/OPNS/ODD	GS-0301-15
10/14 - 09/16	Associate Commissioner	SSA/OPNS/ODD	SES
09/16 -	ARCMOS, Chicago	SSA/OPNS-Chicago	SES

### Education

College/University	Degree	Year	Course of Study
Sangamon State University	B.A.	1981	Management
University of Illinois College of Law	J.D.	1986	

### Awards

Type	Year
Performance Award	2014
Exemplary Contribution or Service Award	2014

Type	Year
NCDDD Andy Marioni Award	2010
National Association of Disability Examiners Great Lakes Outstanding Administrator Award	2006
Lenore Carlson Disability Program Leadership Award	2006
Regional Commissioner's Citation	2004



## SES Member Bios

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**Name:** ROBINSON, Michael D.

**Title:** Assistant Inspector General for Investigations



### Previous Work History

Dates	Position Title	Organization

### Federal Government Positions

Dates	Position	Location	Series/Grade
11/90 - 04/91		U.S. Army	
09/92 - 10/96	Contact Representative	SSA/OPNS-Phila	GS-0962-5/6/7/8/9
10/96 - 04/97	Program Specialist	SSA/OPNS-Phila	GS-0301-9
04/97 - 09/08	Criminal Investigator	SSA/OIG/OI	GS-1811-7/9/11/12/13/14/15
09/08 - 05/14	Assistant Inspector General	SSA/OIG/OTRM	SES
05/14 -	Assistant Inspector General	SSA/OIG/OI	SES

### Education

College/University	Degree	Year	Course of Study
Morris Brown College	B.A.	1992	Legal Studies
Wilmington University	M.S.	2006	Administration of Justice
Florida Institute of Technology	M.B.A.	2011	Management

### Awards

Type	Year
Commissioner's Team Award	2001/1997/1996
SES Performance Bonus	2009

Type	Year
Performance Award	2008/2006/2002/2001/2000/1999
Exemplary Contribution or Service Award	2007
Special Act or Service Award	1999/1998/1997/1995/1994/1993
Commendable Act or Service Award	2006(2)/1999/1997/1996
Assistant Inspector General's Award	2002
Inspector General's Award	2002
On-the-Spot Award	2001/2000
Hammer Award	1995

## SES Member Bios

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**Name:** RODGERS, Stacy L. (Noncareer Appointee)

**Title:** Chief of Staff



### Previous Work History

Dates	Position Title	Organization
11/84 - 03/90	Admissions Counselor/Associate Director of Admissions	Coppin State College
03/90 - 07/91	Staff Assistant	MD Dept of HR
07/91 - 01/93	Assistant Director	MD Dept of HR
01/93 - 12/00	Director	MD Dept of HR
02/01 - 04/03	Chief of Staff and Deputy Director for Programs	DC Gov't/Dept of Human Services
04/03 - 06/04	Principal	Mercer Gov't Human Services Consulting
07/04 - 03/05	Independent Consultant	
03/05 - 09/05	Director, Health and Ancillary Services	Community Alternatives of Washington, DC
09/05 - 02/07	Manager, Office of Planning, Accountability, and Customer Service	Montgomery County Dept of Health and Human Services
03/07 - 03/08	Chief of Staff	MD Dept of HR
04/08 - 02/11	Deputy Secretary for Programs	MD Dept of HR

### Federal Government Positions

Dates	Position	Location	Series/Grade
03/11 - 08/13	Senior Advisor to the Deputy Commissioner	SSA/OC	GS-15

Dates	Position	Location	Series/Grade
08/13 - 03/15	Senior Advisor to the Deputy Commissioner	SSA/OC	SES
03/15 -	Chief of Staff	SSA/OC	SES

## Education

College/University	Degree	Year	Course of Study
University of Maryland, Baltimore County	B.A.		Psychology
University of Baltimore	M.P.A.		

## Awards

Type	Year
Charles M. Mathias Award for Excellence in State Public Service	2011
Chief of Police Special Award for Human Services	2006
Mayor's Meritorious Public Service Award	2003

## SES Member Bios

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**Name:** ROLAND, Van T.

**Title:** Assistant Regional Commissioner for Management  
and Operations Support, Philadelphia



### Previous Work History

Dates	Position Title	Organization

### Federal Government Positions

Dates	Position	Location	Series/Grade
12/91 - 04/01	Social Insurance Specialist	SSA/OPNS-Denver	GS-0105-11/12
04/01 - 10/02	Denver Region Mgmt Development Program	SSA/OPNS-Denver	GS-0301-12
12/02 - 03/06	Area Administrative Assistant	SSA/OPNS-Denver	GS-0105-13
03/06 - 03/07	Deputy Area Director	SSA/OPNS-Denver	GS-0105-14
03/07 - 06/07	Area Administrative Assistant	SSA/OPNS-Denver	GS-0105-13
06/07 - 03/08	Project Manager	SSA/OPNS-Denver	GS-0105-14
03/08 - 06/08	Executive Officer	SSA/OPNS-Denver	GS-0343-15
08/08 - 07/10	SES Candidate Development Program	SSA/OHR	GS-0301-15
07/10 - 01/11	Senior Advisor	SSA/OPNS-Denver	GS-0105-15
01/11 - 01/12	Deputy Regional Commissioner	SSA/OPNS-Denver	SES
01/12 - 05/12	Deputy Associate Commissioner	SSA/OPNS/OCO	SES
05/12 - 07/14	Associate Commissioner	SSA/OPNS/OCO	SES
07/14 - 11/14	Executive Secretary	SSA/OC	SES
11/14 - 08/15	Assistant Deputy Commissioner	SSA/OPNS	SES
08/15 -	ARCMOS	SSA/OPNS-Phila	SES

### Education

College/University	Degree	Year	Course of Study

College/University	Degree	Year	Course of Study
Regis University	B.A.	1991	Business Management/Accounting

## Awards

Type	Year
Commissioner's Citation	2005
Commissioner's Team Award	2007
Regional Commissioner's Citation	2005/1998
SES Performance Bonus	2014/2013/2011
Performance Award	2009/2008/2007/2006(2)/2005/2004/1999/1998/1997/1996/ 1995/1994/1993
Special Act or Service Award	2006/2003
On-the-Spot Award	2000
Excellence in Service Award	1995

## SES Member Bios

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**Name:** ROSS, Jane L.

**Title:** Senior Policy Advisor



### Previous Work History

Dates	Position Title	Organization
1983 - 1984	Congressional Fellow	American Political Science Association
2001 - 2010	Director, Center for Economic, Governance and International Studies	The National Academies (National Research Council)
2010 - 2012	Staff Director, Committee on Law and Justice	The National Academies (National Research Council)

### Federal Government Positions

Dates	Position	Location	Series/Grade
1973 - 1978	Economist	DHHS	
1978 - 1980	Director, Policy Development	Dept of Agriculture	
1980 - 1983	Deputy Director, Research, Statistics and International Policy	SSA	
1984 - 1986	Director, Research, Statistics and International Policy	SSA	
1986 - 1989	Deputy Associate Commissioner	SSA/OP	
1989 - 1992	Senior Advisor, Medicare and Medicaid Issues	GAO	
1992 - 1998	Assistant Director for Income Security Issues	GAO	
1998 - 2001	Deputy Commissioner for Policy	SSA/OP	SES
01/15 -	Senior Policy Advisor	SSA/OC	SES

### Education

College/University	Degree	Year	Course of Study
American University	B.A.	1964	International Relations

College/University	Degree	Year	Course of Study
American University	M.A.	1967	Economics
American University	Ph.D.	1972	Economics

## Awards

Type	Year



## SES Member Bios

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**Name:** SABATINO, Robin A.

**Title:** Associate Commissioner for Electronic Services  
and Technology



### Previous Work History

Dates	Position Title	Organization

### Federal Government Positions

Dates	Position	Location	Series/Grade
09/83 - 11/88	Social Insurance Representative	SSA/OPNS-Chicago	GS-0105-5/7/9/10
11/88 - 12/90	Management Intern	SSA/OM/OMBP	GS-0301-10
12/90 - 03/91	Management Intern	SSA/OM/HRM	GS-0301-11
03/91 - 07/91	Management Analyst	SSA/OM/HRM	GS-0343-11
07/91 - 10/01	Management Analyst	SSA/OHR/OWA	GS-0343-11/12/13/14
10/01 - 02/03	Advanced Leadership Program	SSA/OHR	GS-0301-14/15
02/03 - 06/07	Supvy Program Analyst	SSA/OPNS/OAS	GS-0343-15
06/07 - 09/07	Senior Advisor	SSA/OQP	GS-0343-15
09/07- 03/08	Management Analyst	SSA/OQP	GS-0343-15
03/08 - 07/08	Supvy Management Analyst	SSA/OQP	GS-0343-15
07/08 - 07/10	SES Candidate Development Program	SSA/OHR	GS-0301-15
07/10 - 09/11	Senior Advisor	SSA/OQP	GS-0105-15

Dates 09/11 - 06/12	Position Associate Commissioner	Location SSA/OQP/OQDM	Series/Grade SES
06/12 - 10/14	Program Analyst	SSA/OPNS/OEST	GS-0343-15
10/14 -	Associate Commissioner	SSA/OPNS/OEST	SES

## Education

College/University	Degree	Year	Course of Study
Carthage College	B.A.	1983	Accounting/Business Administration
Johns Hopkins University	M.B.A.	1997	

## Awards

Type	Year
Commissioner's Citation	2000
Commissioner's Team Award	1996
Quality Step Increase	2009/2008/2006/1996/1993
Executive Recognition Team Award	2008
Performance Award	2011/2010/2006/2004/2001/2000/1998/1997
Deputy Commissioner's Citation	2005
Exemplary Contribution or Service	2011
Deputy Commissioner's Team Award	2005(2)/2003/1999
Special Act or Service Award	2006/2005/2002/2000/1999/1995(2)
On-the-Spot Award	2002

## SES Member Bios

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**Name:** SANDERS SPARKS, C. Michelle

**Title:** Assistant Regional Commissioner for Processing

**Center Operations (Kansas City)**



### Previous Work History

Dates	Position Title	Organization

### Federal Government Positions

Dates	Position	Location	Series/Grade
10/89 - 04/95	Claims Representative	SSA/OPNS-KC	GS-0105-7/9/10/11
09/98 - 06/99	Claims Representative	SSA/OPNS-KC	GS-0105-11
06/99 - 09/99	Management Support Specialist	SSA/OPNS-KC	GS-0105-12
09/99 - 02/01	Teleservice Center Manager	SSA/OPNS-KC	GS-0105-12/13
02/01 - 01/04	Recruitment and Retention Coordinator	SSA/OPNS-KC	GS-0343-11
01/04 - 07/04	Area Administrative Assistant	SSA/OPNS-KC	GS-0105-12
07/04 - 03/09	Regional Training Officer	SSA/OPNS-KC	GS-0201-14
03/09 - 12/09	District Manager	SSA/OPNS-KC	GS-0105-14
12/09 - 01/15	Director, Human Resources	SSA/OPNS-KC	GS-0201-15
01/15 - 09/16	SES Candidate Development Program	SSA/OHR	GS-0301-15
09/16 -	ARCPCO	SSA/OPNS-KC	SES

### Education

College/University	Degree	Year	Course of Study
Emporia State University	B.S.		Vocational Rehabilitation

### Awards

Type	Year
Quality Step Increase	2014/2012/2007
Performance Award	2011/2010/009/2008/2007/1994/1993/1992/1991
Deputy Commissioner Citation	2008
Regional Commissioner Citation	2007

## SES Member Bios

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**Name:** SCHAEFFER, Steven L.

**Title:** Chief of Staff, Office of the Inspector General



### Previous Work History

Dates	Position Title	Organization

### Federal Government Positions

Dates	Position	Location	Series/Grade
11/75 - 04/75	Operating Accountant	Dept of Army	GS-9
04/75 - 10/75	Cost Accountant		GS-11
10/75 - 11/79	Systems Accountant	FDIC	GS-11/12
11/79 - 01/82	Operating Accountant	SSA/OMBP/OFR	GS-13
01/82 - 05/88	Supvy Accountant	SSA/OMBP/OFR	GS-14
05/88 - 12/88	Supvy Accountant	SSA/OCFO/OFPO	GS-15
12/88 - 09/96	Director	SSA/OCFO/OFPO	GS-15
09/96 - 02/00	Supvy Financial Management Analyst	SSA/OFAM/OFPO	GS-15
02/00 - 06/16	Assistant Inspector General	SSA/OIG/OA	SES
06/16 -	Chief of Staff	SSA/OIG	SES

### Education

College/University	Degree	Year	Course of Study
Pennsylvania State University	B.S.	1971	Accounting
Pennsylvania State University	M.S.	1974	Accounting
University of Baltimore	J.D.	1984	

## Awards

Type	Year
Presidential Rank Award - Meritorious	2009
Commissioner's Citation	1991
Commissioner's Team Award	2007
SES Performance Bonus	2008/2007/2006/2005/2004/2003/2002
Performance Award	1998/1997(2)/1996/1993/1992/1991/1990
Quality Step Increase	1995
Special Act or Service Award	1990

## SES Member Bios

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**Name:** SCHMIDT, Kristi A.

**Title:** Regional Chief Counsel, Kansas City



### Previous Work History

Dates	Position Title	Organization
1982 - 1983	Judicial Clerk	Missouri Court of Appeals, Western District

### Federal Government Positions

Dates	Position	Location	Series/Grade
1983 - 1995	Assistant Regional Counsel	HHS/OGC-Kansas City	GS-0905-11/12/13/14/15
1995 - 1998	Assistant Regional Counsel	SSA/OGC-Kansas City	GS-0905-15
1998 - 11/08	Deputy Regional Chief Counsel	SSA/OGC-Kansas City	GS-0905-15
11/08 -	Regional Chief Counsel	SSA/OGC-Kansas City	SES

### Education

College/University	Degree	Year	Course of Study
University of Nebraska	B.A.	1979	
University of Missouri, Kansas City	J.D.	1982	

### Awards

Type	Year
Commissioner's Citation	2008
Commissioner's Team Award	1997
SES Performance Bonus	2014/2013/2011/2010
Regional Commissioner's Citation	1993
Regional Commissioner's Award for Managerial Excellence	2000

Type	Year
General Counsel's Citation	1998/1996
Leadership Excellence Award	2007
General Counsel's Supervisory Excellence Award	2002
Excellence in Legal Services Award	1991
Superior Achievement Award	1990
Performance Award	2006/2005/2004/2003/2002/2001/2000/ 1999/1998/1997/1996/1995/1994/1992/1991
Quality Step Increase	1996/1990



## SES Member Bios

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**Name:** SCHOFIELD, Jeremiah C.

**Title:** Deputy Associate Commissioner for Public Service  
and Operations Support



### Previous Work History

Dates	Position Title	Organization

### Federal Government Positions

Dates	Position	Location	Series/Grade
05/00 - 09/01	Contact Service Representative	SSA/OPNS-Seattle	GS-0962-05/06
09/01 - 02/04	Social Insurance Representative	SSA/OPNS-Seattle	GS-0105-07/09/11
02/04 - 11/05	Management Analyst	SSA/OPNS-Seattle	GS-0343-11/12
11/05 - 04/06	Leadership Associate	SSA/OPNS-Seattle	GS-0301-13
04/06 - 09/02	Lead Management Analyst	SSA/OPNS-Seattle	GS-0343-13
09/02 - 12/08	Project Manager	SSA/OPNS-Seattle	GS-0343-14
12/08 - 01/15	Director, Buildings Management	SSA/OBQFM/OFM	GS-1176-15
01/15 - 10/16	SES Candidate Development Program	SSA/OHR	GS-0301-15
10/16 -	Deputy Associate Commissioner	SSA/OPNS/OPSOS	SES

### Education

College/University	Degree	Year	Course of Study
Messiah College	B.A.	1999	Communications
City University of Seattle	MBA	2008	Business

### Awards

Type	Year

Type	Year
Individual Performance Award	2014/2012/2010/20092008/2006
Associate Commissioner's Citation	2012/2011
Quality Step Increase	2011/2010/2006/2003
Commissioner's Citation	2010
Deputy Commissioner's Citation	2010
Exemplary Contribution or Service Award	2009 (2)/2008/2005/2004/2002
Seattle Federal Executive Board Employee of the Year	2008

## SES Member Bios

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**Name:** SHNAIDER, Anatoly

**Title:** Deputy Regional Commissioner, Boston



### Previous Work History

Dates	Position Title	Organization

### Federal Government Positions

Dates	Position	Location	Series/Grade
01/94 - 10/98	Social Insurance Specialist	SSA/OPNS-NY	GS-0105-7/9/11
10/98 - 01/99	Public Affairs Specialist	SSA/OPNS-NY	GS-1035-12
01/99 - 07/00	Area Administrative Assistant	SSA/OPNS-NY	GS-0105-12
07/00 - 06/02	Operations Leadership Development Program	SSA/OPNS-NY	GS-0301-13
06/02 - 12/05	Lead Management Analyst	SSA/OPNS-NY	GS-0343-13
12/05 - 04/10	Project Manager	SSA/OPNS-NY	GS-0105-14
04/10 - 07/08	Center Director, Program Operations	SSA/OPNS-NY	GS-0105-15
07/08 - 04/10	SES Candidate Development Program	SSA/OHR	GS-0301-15
04/10 - 07/12	Center Director, Automation	SSA/OPNS-Boston	GS-0105-15
07/12 - 09/14	ARCMOS	SSA/OPNS-Boston	SES
09/14 -	Deputy Regional Commissioner	SSA/OPNS-Boston	SES

## Education

College/University	Degree	Year	Course of Study
Syracuse University	B.A.	1993	International Relations/Foreign Languages
Hofstra University	M.B.A.	2001	

## Awards

Type	Year
Commissioner's Team Award	2006/2003
Associate Commissioner's Citation	2003
Associate Commissioner's Team Award	2008
Performance Award	2011/2008/2006/2005/2004/2002
Special Act or Contribution Award	2006/2003
Exemplary Contribution or Service Award	2010/2008/2007
On-the-Spot Award	2004

## SES Member Bios

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**Name:** SIEGEL, Donna L.

**Title:** Senior Advisor to the Deputy Commissioner  
for Budget, Finance, Quality, and Management



### Previous Work History

Dates	Position Title	Organization

### Federal Government Positions

Dates	Position	Location	Series/Grade
04/76 - 07/77	Writer-Editor	SSA/OCOMM	GS-5/7
07/77 - 12/79	Management Analyst	SSA/OMA	GS-7
12/79 - 10/82	Writer-Editor	HHS/HCFA	GS-9/11/12
10/82 - 04/84	Management Analyst	HHS/HCFA	GS-12
04/84 - 08/86	Supvy Management Analyst	HHS/HCFA	GS-13
08/86 - 08/87	Supvy Information Management Specialist	HHS/HCFA	GS-13/14
08/87 - 08/92	Deputy Director, Administrative Services	HHS/HCFA	GS-14
08/92 - 10/02	Executive Officer	SSA/OFAM/OFM	GS-14/15
10/02 - 05/03	SES Candidate Development Program	SSA/OHR	GS-15
05/03 - 08/09	Associate Commissioner	SSA/OBFM/OFM	SES
08/09 - 10/13	Assistant Deputy Commissioner	SSA/OHR	SES
10/13 -	Senior Advisor	SSA/OBFQM	SES

### Education

College/University	Degree	Year	Course of Study
University of Maryland	B.A.	1974	English

## Awards

Type	Year
Commissioner's Citation	2001
Commissioner's Team Award	2009
Deputy Commissioner's Citation	2006/1997
SES Performance Bonus	2014/2011/2010/2009/2008/2007/2006/2005
Performance Award	2002/1998/1997/1995/1993/1992
Quality Step Increase	2001/2000
Special Act or Service Award	2002/1997/1996/1995/1994/1993(2)

## SES Member Bios

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**Name:** SIMERMEYER, John W.

**Title:** Associate Commissioner for Retirement and  
Survivors Insurance Systems



### Previous Work History

Dates	Position Title	Organization

### Federal Government Positions

Dates	Position	Location	Series/Grade
01/77 - 09/79	Social Insurance Claims Examiner	SSA/OPO/BRSI	GS-4/5/7/8
09/79 - 02/82	Management Intern	SSA/OMBP/OT	GS-9/11/12
02/82 - 02/85	Program Analyst	SSA/OFO/OFC	GS-12
02/85 - 05/85	Supvy Management Analyst	SSA/OMBP/OMPA	GS-13
05/85 - 04/86	Supvy Management Analyst	SSA/OIS/OISD	GS-13
04/86 - 05/87	Computer Specialist	SSA/OIS/OISD	GS-13
05/87 - 03/96	Supvy Computer Systems Analyst	SSA/OIS/OISD	GS-13
03/96 - 07/04	Supvy Computer Specialist	SSA/OS/OIM	GS-14/15
07/04 - 08/07	Deputy Associate Commissioner	SSA/OS/OEEAS	SES
08/07 - 04/10	Associate Commissioner	SSA/OS/OEEAS	SES
04/10 -	Associate Commissioner	SSA/OS/ORSIS	SES

### Education

College/University	Degree	Year	Course of Study
University of Maryland, Baltimore County	B.A.	1976	General Education

### Awards

Type	Year
Presidential Rank Award - Meritorious	2010
Commissioner's Citation	2000/1996
Commissioner's Team Award	2009/2005
Deputy Commissioner's Citation	2005/1993
Quality Step Increase	1998/1983
Special Act or Service Award	2003/2002/1999(3)/1998/1994/1991(2)/1987(2)/1986/1979
SES Performance Bonus	2014/2013/2011/2009/2008/2007/2006/2005
Performance Award	2004/2003/2002/2000/1997/1996/1993/1992/1991/1990/1989/1988
On-the-Spot Award	1991(2)/1990



## SES Member Bios

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**Name:** SKLAR, Glenn

**Title:** Senior Advisor to the General Counsel



### Previous Work History

Dates	Position Title	Organization
05/90 - 08/90	Law Clerk	Office of the MD Attorney General

### Federal Government Positions

Dates	Position	Location	Series/Grade
05/89 - 08/89	Student Assistant	EPA	GS-0301-7
09/90 - 01/91	Law Clerk	Dept of Justice	GS-1442-7
08/91 - 03/92	Law Clerk	SSA/OGC	GS-0904-11
03/92 - 11/92	Attorney Advisor	SSA/OGC	GS-0905-11/12
11/92 - 08/97	General Attorney	SSA/OIG	GS-0905-12/13/14
08/97 - 07/04	Supvy Attorney-Advisor	SSA/OIG	GS-0905-15
07/04 - 06/09	Associate Commissioner	SSA/ORDP/ODP	SES
06/09 - 01/10	Assistant Deputy Commissioner	SSA/OQP	SES
01/10 - 08/15	Deputy Commissioner	SSA/ODAR	SES
08/15 -	Senior Advisor	SSA/OGC	SES

### Education

College/University	Degree	Year	Course of Study
Tufts University	B.S.	1987	Biology
Washington Colelge of Law	J.D.	1991	

### Awards

Type	Year
Presidential Rank Award - Meritorious	2008
Commissioner's Citation	2000/1999
Commissioner's Team Award	2006(2)/2005
Deputy Commissioner's Citation	2000
SES Performance Bonus	2014/2013/2012/2011/2010/2009/2007/2006/2005
Quality Step Increase	2002/2001/1999/1996
Performance Award	2003/2000/1998
Special Act or Service Award	2003/2002/1999/1995

## SES Member Bios

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**Name:** SLOAN, Mary Ann M.

**Title:** Regional Chief Counsel, Atlanta



### Previous Work History

Dates	Position Title	Organization
11/82 - 01/84	Associate Attorney	Law Firm of Stassi and Rausch
02/84 - 01/86	Staff Attorney	U.S. Court of Appeals, Eleventh Circuit

### Federal Government Positions

Dates	Position	Location	Series/Grade
01/86 - 06/88	Assistant Regional Counsel	HHS/OGC-Atlanta	GS-0905-15
06/88 - 10/95	Principal Regional Counsel	HHS/OGC-Atlanta	GS-0905-15
10/95 - 08/97	Acting Regional Chief Counsel	SSA/OGC-Atlanta	GS-0905-15
08/97 -	Regional Chief Counsel	SSA/OGC-Atlanta	SES

### Education

College/University	Degree	Year	Course of Study
University of New Orleans	B.A.	1978	English
Tulane Law School	J.D.	1982	

### Awards

Type	Year
Presidential Rank Award - Meritorious	2008
Commissioner's Citation	2000
SES Performance Bonus	2014/2013/2011/2010/2009/2007/2006/2005/2004/2003/2000/1998
	1996

Type	Year
OGC Supervisory Excellence Award	
HHS Regional Director's Award	1992
Chief Counsel's Commendation	1988
On-the-Spot Award	1995
Performance Award	1997/1995/1994/1993/1992/1991/1987

## SES Member Bios

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**Name:** SMITH, Phyllis M.

**Title:** Regional Commissioner, Chicago



### Previous Work History

Dates	Position Title	Organization

### Federal Government Positions

Dates	Position	Location	Series/Grade
09/78 - 04/84	Claims Representative	SSA/OPNS-Chicago	GS-0105-5/7/9/10
04/84 - 03/87	Operations Assistant	SSA/OPNS-Chicago	GS-0105-10
03/87 - 08/88	Claims Representative	SSA/OPNS-Chicago	GS-0105-10
08/88 - 12/91	Operations Supervisor	SSA/OPNS-Chicago	GS-0105-11
12/91 - 08/93	Social Insurance Program Specialist	SSA/OPNS-Chicago	GS-0105-12
08/93 - 09/98	Area Administrative Assistant	SSA/OPNS-Chicago	GS-0105-12
09/98 - 05/00	Social Insurance Specialist	SSA/OPNS-Chicago	GS-0105-13
05/00 - 01/04	Hearing Office Director	SSA/OHA-Chicago	GS-0950-14
01/04 - 01/05	Project Manager	SSA/OPNS-Chicago	GS-0343-14
01/05 - 10/08	Executive Officer	SSA/OPNS-Chicago	GS-0105-15
10/08 - 03/13	ARCPCO	SSA/OPNS-Chicago	SES
03/13 - 08/13	ARCMOS	SSA/OPNS-Chicago	SES
08/13 - 11/15	Deputy Regional Commissioner	SSA/OPNS-Chicago	SES
11/15 -	Regional Commissioner	SSA/OPNS-Chicago	SES

### Education

College/University	Degree	Year	Course of Study
Northwestern University	B.S.	1978	Psychology

## Awards

Type	Year
Commissioner's Citation	2005
Deputy Commissioner's Citation	1997
SES Performance Bonus	2014/2010
Performance Award	2006(2)/2005/2004/2002/2001/2000/1999/1998(2)/ 1997/1996/1995/1994/1993(2)/1992(2)/1991/1990
Associate Commissioner's Citation	1999

## SES Member Bios

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**Name:** SOTASKI, Francis (Frank)

**Title:** Associate Commissioner for Applications and  
Supplemental Security Income Systems



### Previous Work History

Dates	Position Title	Organization

### Federal Government Positions

Dates	Position	Location	Series/Grade
06/70 - 12/72	Peripheral Equipment Operator	SSA	GS-0334-02/04
12/72 - 11/75	Computer Operator	SSA/OS	GS-0332-5/7
11/75 - 08/85	Computer Systems Analyst	SSA/OS/OSDD	GS-0334-7/9/11/12/13
08/85 - 06/95	Supvy Computer Specialist	SSA/OS/OSDD	GS-0334-14
06/95 - 05/01	Supvy Computer Specialist	SSA/OS/OIM	GS-0334-14
05/01 - 10/02	Supvy Computer Specialist	SSA/OS/OSES	GS-0334-14
10/02 - 10/11	Division Director	SSA/OS/OSES	GS-2210-15
10/11 - 07/12	Deputy Associate Commissioner	SSA/OS/ORSIS	SES
07/12 - 09/13	Associate Commissioner	SSA/OPNS/OES	SES
09/13 -	Associate Commissioner	SSA/OS/OASSIS	SES

### Education

College/University	Degree	Year	Course of Study
Community College of Baltimore	A.A.		Information Systems

### Awards

Type	Year

Type	Year
Commissioner's Team Award	2005/2003
SES Performance Bonus	2014
Deputy Commissioner's Citation	2005/1998
Deputy Commissioner's Team Award	1991
Associate Commissioner's Citation	2005/2004/2002/2000/1993/1987
General Counsel's Citation	2001
Commendable Act or Service Award	2002/2001/2000/1998(2)
Performance Award	2011/2010/2009/2008/2005/2004/1997/1996/1995/1994/ 1993/1992/1991/1990/1989/1988
Quality Step Increase	2006
On-the-Spot Award	2005/1998



## SES Member Bios

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**Name:** SPENCER, Melissa S.

**Title:** Deputy Associate Commissioner for Disability

**Policy**



### Previous Work History

Dates	Position Title	Organization
05/89 - 04/95	Manager, Medicaid Unit	Virginia Disability Determination Services

### Federal Government Positions

Dates	Position	Location	Series/Grade
07/96 - 08/98	Social Insurance Program Specialist	SSA/OPNS-Phila	GS-0105-12
08/98 - 10/02	Program Expert	SSA/OPNS-Phila	GS-0105-13
10/02 - 10/06	Disability Program Administrator	SSA/OPNS-Phila	GS-0105-14
10/06 - 11/09	Director, Initial Disability Division	SSA/OQP	GS-0105-15
11/09 - 01/12	Acting Deputy Associate Commissioner	SSA/OQP/OQR	GS-0340-15
01/12 - 01/14	SES Candidate Development Program	SSA/OHR	GS-0301-15
01/14 - 02/14	Senior Advisor	SSA/OQP	GS-0105-15
02/14 - 09/15	Acting Deputy Associate Commissioner	SSA/ORDP/ODP	GS-0105-15
09/15 --	Deputy Associate Commissioner	SSA/ORDO/ODP	SES

### Education

College/University	Degree	Year	Course of Study
Virginia Commonwealth University	B.S.	1977	Rehabilitative Services

### Awards

Type	Year
Commissioner's Team Award	2009/2000

Type	Year
Deputy Commissioner's Citation	2008
Quality Step Increase	2011/2009/2005
Performance Award	2010/2008/2006/2002/2001
Exemplary Contribution or Service Award	2009/2007
Special Act or Service Award	2000
Associate Commissioner's Citation	2004/1999

## SES Member Bios

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**Name:** STACHEL, Deborah L.

**Title:** Regional Chief Counsel, San Francisco



### Previous Work History

Dates	Position Title	Organization
08/93 - 09/94	Law Clerk - Law Division	Superior Court of New Jersey
06/95 - 08/96	Law Clerk/Magistrate Judge Courtroom Deputy Clerk	U.S. District Court
12/96 - 06/98	Assistant Corporation Counsel	New York City Law Department

### Federal Government Positions

Dates	Position	Location	Series/Grade
03/99 - 12/03	Staff Attorney	US Court of Appeals	
12/03 - 03/09	Assistant Regional Counsel	SSA/OGC-San Fran	GS-0905-13/14
03/09 - 12/14	Supvy Attorney	SSA/OGC-San Fran	GS-0905-15
12/14 - 08/16	Deputy Regional Chief Counsel	SSA/OGC-San Fran	GS-0905-15
08/16 -	Regional Chief Counsel	SSA/OGC-San Fran	SES

### Education

College/University	Degree	Year	Course of Study
Boston University	B.A.	1988	American Studies (Sociology)
University of Pennsylvania Law School	J.D.	1993	

## Awards

Type	Year
General Counsel's Supervisory Excellence Award	2013/2009
Recognition of Contribution	2015/2014/2012/2011/2010/2008/2005
Quality Step Increase	2009
Exemplary Contribution or Service Award	2015/2014/2012/2008(2)
On-the-Spot Award	2006/2004
Commissioner's Team Award	2011/2010
Deputy Commissioner's Citation	2010
Regional Commissioner's Citation	2010
General Counsel's Citation	2010(3)
General Counsel's Quality Service Award	2014/2012

## SES Member Bios

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**Name:** STEWART, V. Patrice

**Title:** Deputy Associate Commissioner for Central  
**Operations**



### Previous Work History

Dates	Position Title	Organization

### Federal Government Positions

Dates	Position	Location	Series/Grade
06/91 - 09/93	Social Insurance Representative	SSA/OPNS-Atlanta	GS-0105-7/9/10
09/93 - 12/97	Social Insurance Specialist	SSA/OPNS-Atlanta	GS-0105-11
12/97 - 01/01	Social Insurance Systems Specialist	SSA/OS/OSR	GS-0105-12
01/01 - 02/01	Computer Specialist	SSA/OS/OSR	GS-0334-12
02/01 - 01/02	Computer Specialist	SSA/OS/OIM	GS-0334-13
01/02 - 06/02	Lead Computer Specialist	SSA/OS/OIM	GS-0334-13
06/02 - 10/03	IT Specialist	SSA/OS/OEEAS	GS-2210-13
10/03 - 02/05	Lead IT Specialist	SSA/OS/OEEAS	GS-2210-13
02/05 - 05/06	Branch Chief	SSA/OS/OEEAS	GS-2210-14
05/06 - 10/09	Division Director	SSA/OS/OEEAS	GS-2210-15
10/09 - 10/11	SES Candidate Development Program	SSA/OHR	GS-0301-15
10/11 - 11/14	Deputy Associate Commissioner	SSA/OS/OSES	SES
11/14 - 08/16	Deputy Associate Commissioner	SSA/OPNS/OEST	SES
05/16 -	Deputy Associate Commissioner	SSA/OPNS/OCO	SES

### Education

College/University	Degree	Year	Course of Study
Wesleyan College	B.A.	1991	Communications

## Awards

Type	Year
Commissioner's Citation	2004
Deputy Commissioner's Team Award	2009/2004
Executive Recognition Team Award	2009/2007
Associate Commissioner's Citation	2008
Performance Award	2011/2010/2009/2008/2006(2)/2002
Special Act or Service Award	2011/2005/2001
Quality Step Increase	2004/2003
On-the-Spot Award	2001

## SES Member Bios

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**Name:** STONE, Gale S.

**Title:** Deputy Inspector General



### Previous Work History

Dates	Position Title	Organization
01/85 - 06/85	Tax Clerk Assistant	First Alabama Bank
06/85 - 09/85	Data Entry Clerk	Purolator Courier Corporation

### Federal Government Positions

Dates	Position	Location	Series/Grade
09/85 - 03/86	Student Trainee (Accounting)	HHS/OIG/OA-Atlanta	GS-4/5
01/87 - 04/91	Auditor	HHS/OIG/OA-Atlanta	GS-5/7/9/11/12
04/91 - 02/97	Auditor	HHS/OIG/OA	GS-12/13
02/97 - 05/00	Supvy Auditor	SSA/OIG/OA	GS-14/15
05/00 - 02/13	Deputy Assistant Inspector General	SSA/OIG/OA	SES
02/13 -	Deputy Inspector General	SSA/OIG	SES

### Education

College/University	Degree	Year	Course of Study
Huntington College	B.A.	1986	Accounting
Johns Hopkins University	M.S.		Information Systems

### Awards

Type	Year
Commissioner's Team Award	2007
SES Performance Bonus	2011/2010/2009/2008/2007/2006/2005/2004/ 2003/2002/2000

Type	Year
Performance Award	2000/1998
Quality Step Increase	1994
Special Act or Service Award	1996
On-the-Spot Award	1995
OIG Special Citation/Achievement	1994/1989
Hammer Team Award	1997
Association of Gov't Accountants - Special Achievement	1994/1992



## SES Member Bios

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**Name:** STRADTMAN, Terry M.

**Title:** Regional Commissioner, Philadelphia



### Previous Work History

Dates	Position Title	Organization

### Federal Government Positions

Dates	Position	Location	Series/Grade
04/79 - 05/86	Social Insurance Representative	SSA/OPNS-Chicago	GS-0105-5/7/9/10
05/86 - 07/90	Supty Social Insurance Representative	SSA/OPNS-Phila	GS-0105-10/11/12
07/90 - 10/93	Social Insurance Administrator	SSA/OPNS-Phila	GS-0105-12/13
10/93 - 09/95	Managemetn Development Participant	SSA	GS-0301-13/14
09/95 - 05/99	Social Insurance Administrator	SSA/OPNS-Phila	GS-0105-14
05/99 - 10/02	Area Director	SSA/OPNS-Phila	GS-0105-15
10/02 - 03/04	SES Candidate Development Program	SSA	GS-0301-15
03/04 - 08/07	Area Director	SSA/OPNS-Phila	GS-0105-15
08/07 - 04/10	Deputy Associate Commissioner	SSA/OS/ORSIS	SES
04/10 - 01/11	Associate Commissioner	SSA/OS/OEEAS	SES
01/11 - 05/12	Associate Commissioner	SSA/OPNS/OCO	SES
05/12 -	Regional Commissioner	SSA/OPNS-Phila	SES

### Education

College/University	Degree	Year	Course of Study
Ohio State University	B.A.	1978	Political Science

## Awards

Type	Year
Commissioner's Citation	2009
Commissioner's Team Award	2009/2008/2003
SES Performance Bonus	2014/2013/2011/2010/2009
Deputy Commissioner's Citation	2001/1995
Associate Commissioner's Citation	2006/1998(2)
Executive Resources Award	2007
Quality Step Increase	1990/1989/1988
Performance Award	2006/2005/2003/2002/2001/1999/1997/1996/1995/1993/ 1992/1991/1985
Special Act or Service Award	2000/1998/1994/1993/1992/1991/1990/1989
On-the-Spot Award	2003

## SES Member Bios

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**Name: STRAUSS, Herbert M. (Noncareer Appointee)**

**Title: Assistant Deputy Commissioner for Systems /**

**Deputy Chief Information Officer**



### Previous Work History

Dates	Position Title	Organization
06/94 - 12/94	Field Campaign Director	U.S. Senate Campaign
12/94 - 04/95	Executive Vice President	The Open Source Group, Ltd.
05/95 - 04/96	Financial Advisory Executive	American Express
04/96 - 04/99	Managing Consultant, Gov't Consulting Services	Electronic Data Systems
04/99 - 08/01	Vice President and Client Delivery Executive, Intelligence and Special Applications Services	Electronic Data Systems
08/01 - 11/03	Client Marketing Executive	Electronic Data Systems
11/03 - 01/08	Research Vice President, National Security	Gartner, Inc.
01/08 - 07/11	Chief Strategy and Corporate Development Officer	Robbins-Gioia, Inc.
07/11 - 11/12	Vice President and Senior Managing Partner	Gartner, Inc.

### Federal Government Positions

Dates	Position	Location	Series/Grade
06/74 - 07/94	Commissioned Officer	U.S. Marine Corps	
08/13 -	Assistant Deputy Commissioner / Deputy Chief Information Officer	SSA/OS	SES

### Education

College/University	Degree	Year	Course of Study
Norwich University	B.A.		Government
Johns Hopkins University	M.B.A.		Strategy and Finance
Johns Hopkins University	M.S.		Information & Telecomm Systems

**Awards**

Type	Year

## SES Member Bios

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**Name:** TEEL, Vance N.

**Title:** Associate Commissioner for International  
Programs



### Previous Work History

Dates	Position Title	Organization

### Federal Government Positions

Dates	Position	Location	Series/Grade
08/79 - 02/81	Access Student	SSA/OPNS-Chicago	GS-0099-4/5
02/81 - 03/86	Social Insurance Representative	SSA/OPNS-Chicago	GS-0105-5/7/9/10
03/86 - 04/87	Supvy Social Insurance Representative	SSA/OPNS-Chicago	GS-0105-11
02/88 - 03/91	Supvy Social Insurance Representative	SSA/OPNS-Seattle	GS-0105-12
03/91 - 07/92	Social Insurance Administrator	SSA/OPNS-Seattle	GS-0105-13
07/92 - 11/98	Social Insurance Operations Officer	SSA/OPNS-Philippines	GS-0105-13/14
11/98 - 09/99	Supvy Social Insurance Specialist	SSA/OPNS	GS-0105-14
09/99 - 04/02	Consular Officer	State Dept-Mexico	FP-93045-02
04/02 - 07/03	Supvy Social Insurance Specialist	SSA/OPNS	GS-0105-14
07/03 - 10/05	Supvy Social Insurance Specialist	SSA/ODISP	GS-0105-15
10/05 - 05/12	Assistant Associate Commissioner for International Operations	SSA/OPNS/OCO-OIO	SES
	Deputy Associate Commissioner	SSA/OPNS/OCO	SES

Dates	Position	Location	Series/Grade
05/12 - 04/13			
04/13 -	Associate Commissioner	SSA/ORDP/OIP	SES

## Education

College/University	Degree	Year	Course of Study
University of Wisconsin, LaCrosse	B.S.	1980	Psychology

## Awards

Type	Year
Presidential Rank Award - Meritorious	2011
Commissioner's Team Award	2009
SES Performance Bonus	2014/2013/2010/2008/2007/2006
Deputy Commissioner's Citation	2005
Quality Step Increase	2005/2003
Special Act or Service Award	2004/1991/1990/1988/1985
Performance Award	2004/1991/1990/1988/1985

## SES Member Bios

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**Name:** THOMAS, David E.

**Title:** Associate Commissioner for Hardware Engineering



### Previous Work History

Dates	Position Title	Organization

### Federal Government Positions

Dates	Position	Location	Series/Grade
06/88 - 07/90	Student Trainee	SSA/OS/OSO	GS-0099-4/5
07/90 - 05/98	Computer Systems Programmer	SSA/OS/OSO	GS-0334-7/9/11/12/13
05/98 - 03/01	Lead Computer Specialist	SSA/OS/OTSO	GS-0334-13
03/01 - 07/02	Supvy Computer Specialist	SSA/OS/OTSO	GS-0334-14
07/02 - 07/08	Division Director	SSA/OS/OTSO	GS-2210-15
07/08 - 07/10	SES Candidate Development Program	SSA/OHR	GS-0301-15
07/10 - 03/11	Division Director	SSA/OS/OTSO	GS-2210-15
03/11 - 07/16	Assistant Associate Commissioner for Enterprise IT Services Management	SSA/OS/OTSO	SES
07/16 -	Associate Commissioner	SSA/OS/OSOHE	SES

### Education

College/University	Degree	Year	Course of Study
University of Maryland, Eastern Shore	B.S.	1990	Computer Science

### Awards

Type	Year
Commissioner's Team Award	1998

Type	Year
SES Performance Bonus	2014/2013
Deputy Commissioner's Team Award	2008
Associate Commissioner's Team Award	2004/2002/2001/1999
Exemplary Contribution or Service Award	2009/2008
Quality Step Increase	2006/2004
Special Act or Service Award	2006(2)/2002/2000(2)/1999(2)/1998(2)/1997
Performance Award	2005/2003/2001
On-the-Spot Award	2006/2004/2003/2002/2001(3)



## SES Member Bios

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**Name:** THURMOND, A. Jacy

**Title:** Senior Advisor to the Deputy Commissioner  
for Human Resources



### Previous Work History

Dates	Position Title	Organization

### Federal Government Positions

Dates	Position	Location	Series/Grade
06/74 - 09/74	Clerk	Dept of Navy	GS-0301-4
06/75 - 09/75	Legal Clerk	Dept of Navy	GS-0986-6
05/78 - 11/78	Law Clerk	EEOC	GS-0904-11
11/78 - 08/90	Attorney Advisor	EEOC	GS-0905-11/12/13/14
08/90 - 08/92	SES Candidate Development Program	EEOC	GS-0301-15
08/92 - 12/01	Attorney Advisor	EEOC	GS-0905-15
12/01 - 04/06	Associate Commissioner	SSA/ODISP/OHA	SES
04/06 - 08/07	Assistant Deputy Commissioner	SSA/ODAR	SES
08/07 - 11/08	Senior Advisor	SSA/OC	SES
11/08 - 01/12	Associate Commissioner	SSA/OHR/OCREO	SES
01/12 -	Senior Advisor	SSA/OHR	SES

### Education

College/University	Degree	Year	Course of Study
Colgate University	B.A.	1974	Social Relations
University of Virginia	J.D.	1977	

## Awards

Type	Year
Presidential Rank Award - Meritorious	2006
Commissioner's Citation	2006
SES Performance Bonus	2009/2006/2005/2004/2003/2002

## SES Member Bios

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**Name:** TRACHT, Nadine N.

**Title:** Deputy Associate Commissioner for IT Financial  
Management and Support



### Previous Work History

Dates	Position Title	Organization

### Federal Government Positions

Dates	Position	Location	Series/Grade
09/90 - 08/91	Communications Specialist	SSA/OM/OMIR	GS-0393-12
08/91 - 05/92	Communications Specialist	SSA/OS/OT	GS-0393-12
05/92 - 03/97	Telecommunications Specialist	SSA/OS/OT	GS-0391-12
03/97 - 01/00	Telecommunications Specialist	SSA/OS/OTSO	GS-0391-12/13
01/00 - 06/03	Supvy Telecommunications Specialist	SSA/OS/OTSO	GS-0391-14
06/03 - 10/03	Communications Management Officer	SSA/OS/OTSO	GS-0340-15
10/03 - 01/04	Supvy Telecommunications Specialist	SSA/OS/OTSO	GS-0391-14
01/04 - 02/04	Communications Management Officer	SSA/OS/OTSO	GS-0340-15
02/04 - 06/04	Supvy IT Specialist	SSA/OS/OTSO	GS-2210-15
06/04 - 07/04	Communications Management Officer	SSA/OS/OTSO	GS-0340-15
07/04 - 01/12	Division Director	SSA/OS/OTSO	GS-2210-15
01/12 - 01/14	SES Candidate Development Program	SSA/OHR	GS-0301-15
01/14 - 06/14	Supvy IT Specialist	SSA/OS/OTSO	GS-2210-15
06/14 - 11/15	IT Specialist	SSA/OS/OEEAS	GS-2210-15
11/15 - 01/16	Staff Director	SSA/OS	GS-2210-15
01/16 -	Deputy Associate Commissioner	SSA/OS/OITFMS	SES

### Education

College/University	Degree	Year	Course of Study
Miami Dade Community College	A.A.	1979	Business

## Awards

Type	Year
Quality Step Increase	2011/2010
Deputy Commissioner's Citation	2010/2008
Exemplary Contribution or Service Award	2015/2010/2009
Performance Award	2015/2014/2012/2009/2008/2006/2005/2003/2002/2001/1998
On-the-Spot Award	2006/2003
Special Act or Contribution Award	2010/2006/2004/2000/1999
Associate Commissioner's Citation	2001/2000/1999/1998

## SES Member Bios

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**Name:** TRAIN, Laura N.

**Title:** Associate Commissioner for Learning



### Previous Work History

Dates	Position Title	Organization
06/94 - 11/94	Clerk	Texas Dept of Criminal Justice
11/94 - 06/95	Researcher	Association of Certified Fraud Examiners

### Federal Government Positions

Dates	Position	Location	Series/Grade
06/95 - 06/02	Social Insurance Specialist	SSA/OPNS-Dallas	GS-0105-7/9/11
06/02 - 08/02	Social Insurance Specialist	SSA/OS/OSA	GS-0105-11/12
08/02 - 06/04	IT Specialist	SSA/OS/ODSSIS	GS-2210-13
06/04 - 10/04	Advanced Leadership Development Program	SSA/OHR	GS-0301-13/14
10/04 - 10/05	IT Specialist	SSA/OS/ODSSIS	GS-2210-14
10/05 - 11/05	Supvy IT Specialist	SSA/OS/ODS	GS-2210-14
11/05 - 08/06	Executive Officer	SSA/OS/ODS	GS-2210-14
08/06 - 07/08	Supvy Social Insurance Specialist	SSA/OQP	GS-0105-15
07/08 - 07/10	SES Candidate Development Program	SSA/OHR	GS-0301-15
07/10 - 01/11	Supvy Social Insurance Specialist	SSA/OQP	GS-0105-15
01/11 - 10/12	Deputy Associate Commissioner	SSA/OPNS/OES	SES
10/12 - 11/16	Associate Commissioner	SSA/OCOMM/OCPT	SES
11/16 - Present	Associate Commissioner	SSA/DCHR/OL	SES

### Education

College/University	Degree	Year	Course of Study

College/University	Degree	Year	Course of Study
University of Texas	B.A.	1994	Sociology/Social Work

## Awards

Type	Year
SES Performance Bonus	2014/2013
Deputy Commissioner's Citation	2007
Deputy Commissioner's Team Award	2005(2)
Performance Award	2009/2006(2)
Executive Recognition Team Award	2008
On-the-Spot Award	2004(2)/2003(2)
Commendable Act or Service Award	2005/2004/2003

## SES Member Bios

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**Name:** WADDELL, Tina M.

**Title:** Assistant Deputy Commissioner for Human Resources



### Previous Work History

Dates	Position Title	Organization

### Federal Government Positions

Dates	Position	Location	Series/Grade
11/86 - 09/91	Attorney-Advisor	HHS/OGC	GS-0905-11/12/13/14
09/91 - 03/95	Lead Attorney	HHS/OGC-Dallas	GS-0905-14
03/95 - 02/97	Supvy Attorney	HHS/OGC-Dallas	GS-0905-14/15
02/97 - 03/98	General Attorney	SSA/OGC	GS-0905-15
03/98 - 08/08	Regional Chief Counsel	SSA/OGC-Dallas	SES
08/08 - 06/12	Associate General Counsel	SSA/OGC/OGL	SES
06/12 - 10/13	Assistant Deputy Commissioner	SSA/OBFM	SES
10/13 - 07/15	Administrative Appeals Judge	SSA/ODAR/OAO	AA-06
07/15 - 11/16	Senior Advisor	SSA/OGC	SES
11/16 -	Assistant Deputy Commissioner	SSA/OHR	SES

### Education

College/University	Degree	Year	Course of Study
Duke University	B.A.	1980	Economics/Political Science
University of Maryland	J.D.	1986	

## Awards

Type	Year
Commissioner's Team Award	2006
SES Performance Bonus	2011/2010/2009/2008/2007/2006/2004/1998
Performance Award	1997/1996/1995/1994/1993/1992/1991/1990
GC's Supervisory Excellence Award	1996
Equal Opportunity Achievement Award	1994
GC's Superior Achievement Award	1992



## SES Member Bios

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**Name:** WALKER, Douglas K. (Noncareer Appointee)

**Title:** Deputy Commissioner for Communications



### Previous Work History

Dates	Position Title	Organization
05/85 - 12/86	Desk Assistant	WRC-TV
04/88 - 11/88	Political Director/Deputy Chief of Staff	Democratic National Committee
12/88 - 02/89	Eastern Region Political Director	Friends of Rick Weiner
02/90 - 11/90	Chicago Political Director	Simon for Senate
05/91 - 04/92	Public Relations Aide	Chicago Public Schools
04/92 - 06/93	Development Director	WAUS-FM
05/98 - 05/99	Communications Director	Democratic National Committee
1999 - 2003	Communications Manager	National Education Association
2003 - 2007	Manager, State Policy & Politics	National Education Association
2007 - 2009	Publications Manager	National Education Association
2009 - 2012	Associate Director, Interactive Media	National Education Association
2012 - 2013	Executive Vice President, Operations	Integrated Media, Inc.
2012 - 2013	Interim Vice President and General Manager	WGTS 9139 FM

### Federal Government Positions

Dates	Position	Location	Series/Grade
01/87 - 03/88	Legislative Aide	U.S. House of Reps	
02/89 - 03/90	Special Assistant	U.S. Senate	
09/90 - 12/90	Staff Assistant	U.S. Senate	
06/93 - 06/94	Speechwriter	OPM	GS-12
06/94 - 04/96	Director of Program Management	OPM	GS-15
04/96 - 03/97	Deputy Chief of Staff	OPM	GS-15

Dates	Position	Location	Series/Grade
03/97 - 05/98	Director of Communications	OPM	SES
08/99 - 11/33	Special Assistant for Public Affairs	Dept of Labor	GS-15
10/13 -	Deputy Commissioner for Communications	SSA/OCOMM	SES

## Education

College/University	Degree	Year	Course of Study
Howard University	B.A.		Communications

## Awards

Type	Year

## SES Member Bios

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**Name:** WALKER, Janet L.

**Title:** Associate Commissioner for Public Service and  
Operations Support



### Previous Work History

Dates	Position Title	Organization

### Federal Government Positions

Dates	Position	Location	Series/Grade
01/86 - 02/88	Access COOP Student	SSA/OPNS-Dallas	GS-0099-4/5
02/88 - 12/92	Claims Representative	SSA/OPNS-Dallas	GS-0105-5/7/9/10/11
12/92 - 06/97	Operations Supervisor	SSA/OPNS-Dallas	GS-0105-11/12
06/97 - 10/97	Field Office Manager	SSA/OPNS-Dallas	GS-0105-13
10/97 - 04/98	Social Insurance Specialist	SSA/OPNS-Dallas	GS-0105-12
04/98 - 06/01	District Manager	SSA/OPNS-Dallas	GS-0105-13
06/01 - 07/02	Dallas Region Leadership Development Program	SSA/OPNS-Dallas	GS-0301-14
07/02 - 03/09	District Manager	SSA/OPNS-Dallas	GS-0105-14
03/09 - 07/11	Division Director	SSA/OPNS/OCO-ODO	GS-0301-15

Dates 07/11 - 01/12	Position Division Director	Location SSA/OPNS/OCO- ODO	Series/Grade GS-0340-15
01/12 - 01/14	SES Candidate Development Program	SSA/OHR	GS-0301-15
01/14 - 08/14	Program Manager	SSA/OPNS-Atlanta	GS-0301-15
08/14 - 02/16	Assistant Regional Commissioner for Management and Operations Support	SSA/OPNS-Atlanta	SES
02/16 - 08/16	Deputy Regional Commissioner	SSA/OPNS-Chicago	SES
08/16 -	Associate Commissioner	SSA/OPNS/OPSOS	SES

## Education

College/University	Degree	Year	Course of Study
University of Arkansas	B.A.	1988	Social Work

## Awards

Type	Year
Performance Award	2014/2012/2011/2009/2008/2007/2006/2005/2004/2003/2002/ 2001/2000/1999/1998/1997
Quality Step Increase	2008/2006/2004/2003/2000
Exemplary Contribution or Service Award	2014/2011/2010(2)/2009(2)/2008
Special Act or Service Award	2006
Quality Service Award	2006/2004/2000

## SES Member Bios

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**Name:** WEBB, Nancy O.

**Title:** Associate Commissioner for Electronic Services  
and Strategic Information



### Previous Work History

Dates	Position Title	Organization

### Federal Government Positions

Dates	Position	Location	Series/Grade
06/75 - 09/82	Social Insurance Claims Examiner	SSA/ODI	GS-0993-5/7/9/10/11
06/85 - 03/89	Social Insurance Claims Examiner	SSA/OPNS/OCO-ODO	GS-0993-9/10/11
03/89 - 05/97	Program Analyst	SSA/OP/OD	GS-0345-12/13
05/97 - 09/99	Social Insurance Specialist	SSA/ODISP/OD	GS-0105-14
09/99 - 06/02	Branch Chief, Disability Systems	SSA/ODISP/OD	GS-0105-14
06/02 - 09/09	Office Director, Health IT & Electronic Policy	SSA/ORDP/ODP	GS-0343-15
09/09 - 05/13	Deputy Associate Commissioner	SSA/ORDP/OISP	SES
05/13 -	Associate Commissioner	SSA/ODAR/OESSI	SES

### Education

College/University	Degree	Year	Course of Study
University of Maryland, Baltimore County	B.A.	1975	History

### Awards

Type	Year
Commissioner's Team Award	2009/2003

Type	Year
SES Performance Bonus	2014
Deputy Commissioner's Team Award	2008(2)/2005(3)
Deputy Commissioner's Citation	2008/2005/2004
Associate Commissioner's Citation	2008/2003/2001
Exemplary Contribution or Service Award	2008
Quality Step Increase	2008/1993/1990/1980
Executive Recognition Award	2007
Special Act or Service Award	2001/1999/1993/1991/1990
Performance Award	2006/2005/2004/2003/2002/2000/1998/1997/1996/ 1995/1992/1989/1988

## SES Member Bios

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**Name:** WELLS, Reginald F.

**Title:** Deputy Commissioner for Human Resources



### Previous Work History

Dates	Position Title	Organization
06/78 - 06/80		National Center on Black Aged
06/80 - 04/81		Dept of Citizens Services, Essex County, NJ
04/81 - 04/84		Dept of Health & Rehabilitation, Essex County, NJ

### Federal Government Positions

Dates	Position	Location	Series/Grade
02/73 - 06/73	Postal Assistant	U.S. Post Office	
05/84 - 01/86	Program Manager Superintendent	DC Dept of Human Services	GS-15
01/86 - 01/87	Deputy, Mental Health		GS-15
01/87 - 11/89	Program Manager Superintendent		GS-15
11/89 - 05/92	Mental Health Officer		GS-15
05/92 - 10/94	Deputy Commissioner		GS-16
10/94 - 04/02	Deputy Commissioner	DHHS	GS-15
04/02 - 06/02	Social Insurance Specialist	SSA/ODISP	GS-15
06/02 - 07/02	Deputy Associate Commissioner	SSA/ODISP/ODPP	SES
07/02 -	Deputy Commissioner	SSA/OHR	SES

### Education

College/University	Degree	Year	Course of Study
American International College	B.A.	1974	Psychology
Temple University	M.A.	1977	Social Psychology
Temple University	Ph.D.	1980	

## Awards

Type	Year
Presidential Rank Award - Meritorious	2006
Secretary's Award for Distinguished Service	2002
Commissioner's Special Recognition Award	2000
SES Performance Award	2014/2013/2012/2011/2010/2009/2008/ 2007/2005/2004/2003/2002
Performance Award	2000/1999/1998/1997/1996
Special Act or Service Award	1997/1994
David O. Cooke Award for Leadership in Public Service (OPM)	2009



## SES Member Bios

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**Name:** WIGGINS, Dawn

**Position of Record:** Deputy Associate Commissioner for  
**Income Security Programs**



### Previous Work History

Dates	Position Title	Organization
1993 - 1994	Attorney	Law Offices of Robert Fila
1994 - 1997	Attorney/Legislative Advisor	MD Dept. of Health and Mental Hygiene

### Federal Government Positions

Dates	Position	Location	Series/Grade
09/97 - 03/99	Attorney Advisor	SSA/OGC/OPL	GS-0905-12
03/99 - 09/08	Attorney	SSA/OGC/OGL	GS-0905-13/14
09/08 - 01/15	Deputy Executive Director	SSA/OGC/OPD	GS-0105-15
01/05 - 11/16	SSA Candidate Development Program	SSA/OGC/OPD	GS-0343-15
11/16 -	Deputy Associate Commissioner	SSA/ORDP/OISP	SES

### Education

College/University	Degree	Year	Course of Study
American University	B.A.	1990	Political Science & Economics
University of Baltimore	J.D.	1993	

### Awards

Type	Year
Commissioner's Team Award	2008/2005/2000
Deputy Commissioner's Citation	2008/2005

## SES Member Bios

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**Name:** WILDER, Bryant L.

**Title:** Assistant Regional Commissioner for Management  
and Operations Support, New York



### Previous Work History

Dates	Position Title	Organization

### Federal Government Positions

Dates	Position	Location	Series/Grade
05/80 - 08/80	Clerk Typist	SSA/OPNS-NY	GS-0322-2
06/81 - 07/81	Summer Aid	SSA/OPNS-NY	YV-3506
07/81 - 09/82	Clerk Typist	SSA/OPNS-NY	GS-0322-3/4
09/82 - 03/84	Claims Clerk	SSA/OPNS-NY	GS-0998-4
03/84 - 02/86	Contact Representative	SSA/OPNS-NY	GS-0962-5/6
02/86 - 06/89	Social Insurance Representative	SSA/OPNS-NY	GS-0105-7/6/10
06/89 - 02/91	Operations Supervisor	SSA/OPNS-NY	GS-0105-11
02/91 - 07/91	Area Analyst	SSA/OPNS-NY	GS-0105-11
07/91 - 12/95	Area Administrative Assistant	SSA/OPNS-NY	GS-0105-12
12/95 - 10/09	District Manager	SSA/OPNS-NY	GS-0105-13/14
10/09 - 10/11	SES Candidate Development Program	SSA/OHR	GS-0301-15
10/11 - 04/15	Deputy ARCMOS	SSA/OPNS-New York	GS-0343-15
04/15 -	ARCMOS	SSA/OPNS-NY	SES

### Education

College/University	Degree	Year	Course of Study

## Awards

Type	Year
Commissioner's Citation	2009
Quality Step Increase	2015/2009/2006
Performance Award	2014/2012/2011/2008/2006/2005/2004/2003
On-the-Spot Award	2006
Special Act or Service Award	2002/2000/1999/1998/1996(2)

## SES Member Bios

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**Name:** WILHITE, Dennis

**Title:** Deputy Associate Commissioner for Disability

**Determinations**



### Previous Work History

Dates	Position Title	Organization

### Federal Government Positions

Dates	Position	Location	Series/Grade
07/81 - 05/86	Benefit Authorizer	SSA/OPNS-Chicago	GS-0993-5/7/8
05/86 - 06/91	Claims Representative	SSA/OPNS-Chicago	GS-0105-9/10
06/91 - 02/97	Operations Supervisor	SSA/OPNS-Chicago	GS-0105-11/12
02/97 - 03/99	Management Support Specialist	SSA/OPNS-Chicago	GS-0105-12
03/99 - 10/99	Assistant District Manager	SSA/OPNS-Chicago	GS-0105-13
10/99 - 12/99	Staff Specialist	SSA/OPNS-Chicago	GS-0105-13
12/99 - 02/01	District Manager	SSA/OPNS-Chicago	GS-0105-13
02/01 - 12/04	Operations Manager, Great Lakes PSC	SSA/OPNS-Chicago	GS-0105-14
12/04 - 08/06	Director, Quality Management	SSA/OCSO	GS-0343-15
08/06 - 08/07	Director, Competitive Sourcing	SSA/OCSO	GS-0343-15
08/07 - 08/09	Director, Competitive Sourcing Staff	SSA/OBQFM/OB	GS-0343-15
08/09 - 05/10	Senior Technical Advisor	SSA/OBQFM/OB	GS-0343-15
05/10 - 06/12	Director, Budget Execution and Automation	SSA/OBQFM/OB	GS-0501-15
06/12 - 01/15	Director, Administrative Budget	SSA/OBQFM/OB	GS-0560-15
01/15 - 07/16	SES Candidate Development Program	SSA/OHR	GS-0301-15
07/16 -	Deputy Associate Commissioner	SSA/OPNS/ODD	SES

### Education

College/University	Degree	Year	Course of Study
University of Akron	B.A.		Psychology

## Awards

Type	Year
Commissioner's Team Award	2013
Commissioner's Citation	2010
Quality Step Increase	2014/2011
Recognition of Contribution	2012

## SES Member Bios

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**Name:** WISE, Daryl X.

**Title:** Associate Commissioner for Quality Improvement



### Previous Work History

Dates	Position Title	Organization

### Federal Government Positions

Dates	Position	Location	Series/Grade
02/82 - 08/84	Computer Systems Analyst	SSA/OS	GS-0334-9/11
08/84 - 05/85	Computer Systems Analyst	Admin Office of US Courts	GS-0334-11
05/85 - 05/87	Computer Systems Analyst	SSA/OS	GS-0334-12/13
05/87 - 02/99	Supvy Computer Systems Analyst	SSA/OS	GS-0334-13/14
02/99 - 06/02	Supvy Computer Specialist	SSA/OS	GS-0334-14
06/02 - 01/06	Division Director	SSA/OS	GS-0334-15
01/06 - 07/07	SES Candidate Development Program	SSA/OHR	GS-0301-15
07/07 -	Associate Commissioner	SSA/OBFQM/OQI	SES

### Education

College/University	Degree	Year	Course of Study
University of Pittsburgh	M.A.	1981	Info Science & Systems

## Awards

Type	Year
Commissioner's Citation	2002/1998
SES Performance Bonus	2014/2013/2011/2010/2009
Deputy Commissioner's Citation	2006(2)/2004/1999
Associate Commissioner's Citation	1998/1996/1993
Performance Award	2006(2)/2005/2004/2003/2002/2000(2)/1999/1998/1997/ 1996(2)/1995(2)/1993/1992/1991

Separations of Career SES Employees from FY 2012 - FY 2016						
Type of Separation	FY12	FY13	FY14	FY15	FY16	Total
Early Out Retirement	1	1				2
Regular (Optional) Retirement	16	7	10	13	9	55
Resignation				1	1	2
Transfer	1			3	2	6
<b>Total</b>	<b>18</b>	<b>8</b>	<b>10</b>	<b>17</b>	<b>12</b>	<b>65</b>

**Note:** Separation counts only include Career Senior Executive Service (SES) Appointees. Excludes Non-Career Political and Limited Term Appointees.

Data Source: HRODS

Data as of Date: 12/14/16

Date Query Produced : 12/15/16

Query File Name: SES Separations FY12-16

Transition Team Member Document--Non-Public Information. This document may be disclosed to Authorized Transition Team Members only.



SES Appointments/Reassignments/Details Within the Last 24 Months - as of 12/14/2016					
Transition Team Member Document--Non-Public Information. This document may be disclosed to Authorized Transition Team Members only.					
Name	Appointment Date	Reassignment Date	Detail Date	Appointed/Reassigned/Detailed From	Appointed/Reassigned/Detailed To
There were no SES appointments, reassignments, or details on 12/7/14.					
King, Michelle			12/8/2014	Deputy Associate Commissioner for Budget	Unclassified Duties (see box on right)
Lemon, Wayne			Extension of Detail 12/26/2014	Deputy Associate Commissioner, Retirement & Survivors Insurance Systems	Deputy Associate Commissioner, Retirement & Survivors Insurance Systems
Horne, Mary			Termination of Detail 12/27/2014	Assistant Deputy Commissioner for Operations	Assistant Regional Commissioner for Management and Operations Support (Phila)
Lu, Natalie			Extension of Detail 12/27/14	Associate Commissioner for Retirement Policy	Associate Commissioner for Retirement Policy
Schmidt, Kristi			Extension of Detail 12/31/14	Deputy General Counsel	Deputy General Counsel
Morenz, John			Termination of Detail 1/4/15	Chief Technology Officer	Associate Commissioner for Enterprise Support, Architecture and Engineering
Morenz, John			Detail 1/5/15	Associate Commissioner for Enterprise Support, Architecture and Engineering	Deputy Chief Technology Officer
Kramer, Michael			Detail 1/11/15	Deputy Regional Commissioner (Kansas City)	Assistant Deputy Commissioner for Operations
Kristen Medley-Proctor		1/11/2015		Executive Director for Strategic Human Capital Management	Associate Commissioner for Personnel
Snyder, Roy			Detail 1/12/15	Deputy Associate Commissioner for Public Service and Operations Support	Unclassified Duties
Ames, Karen			Termination of Detail 1/24/2015	Unclassified Duties	Deputy Associate Commissioner for Civil Rights and Equal Opportunity
Ames, Karen		1/25/2015		Deputy Associate Commissioner for Civil Rights & Equal Opportunity	Senior Advisor to the Disability Case Processing Systems Staff
Brune, Sean			Termination of Detail 1/31/15	Assistant Deputy Commissioner for Retirement & Disability Policy	Regional Commissioner (Denver)
Bennett, Cynthia			Extension of Detail 2/4/15	Associate Commissioner for Telephone Services	Associate Commissioner for Telephone Services
Gruber, Theresa			Extension of Detail 2/4/15	Chief Program Officer for Disability Case Processing System	Chief Program Officer for Disability Case Processing System
Rivers Jr, Kenneth			Extension of Detail 2/4/15	Assistant Associate Commissioner for Infrastructure, Architecture, & Configuration	Assistant Associate Commissioner for Infrastructure, Architecture, & Configuration

Unclassified duties are work related to a specific initiative or project not tied to a classified position. In the Office of Human Resources, we have classification specialists who establish organizational positions based on each organization's mission. The classification specialists group similar work and levels of responsibility and write descriptions (PDs) for each. Unclassified duties are those that are unrelated to any of the agency's PDs.

SES Appointments/Reassignments/Details Within the Last 24 Months - as of 12/14/2016					
Transition Team Member Document--Non-Public Information. This document may be disclosed to Authorized Transition Team Members only.					
Name	Appointment Date	Reassignment Date	Detail Date	Appointed/Reassigned/Detailed From	Appointed/Reassigned/Detailed To
Brune, Sean		2/8/2015		Regional Commissioner (Denver)	Senior Advisor to the Deputy Commissioner for Budget, Finance, Quality & Management (Audits)
Parry, Dan			Extension of Detail 2/25/15	Associate Commissioner for Enterprise Support Architecture and Engineering	Associate Commissioner for Enterprise Support Architecture and Engineering
Colon-Mollfulleda, Wanda			Termination of Detail 3/7/15	Unclassified Duties	Deputy Regional Commissioner (Denver)
Colon-Mollfulleda, Wanda			Detail 3/8/15	Deputy Regional Commissioner (Denver)	Regional Commissioner (Denver)
Infiesta, Julio			Termination of Detail 3/8/15	Deputy Regional Commissioner (NY)	Assistant Regional Commissioner for Management & Operations Support (NY)
Rodgers, Stacy		3/8/2015		Senior Advisor to the Deputy Commissioner	Chief of Staff
Infiesta, Julio		4/5/2015		Assistant Regional Commissioner for Management & Operations Support (NY)	Deputy Regional Commissioner (NY)
Rivers Jr, Kenneth			Termination of Detail 4/5/15	Assistant Associate Commissioner for Infrastructure, Architecture, & Configuration	Associate Commissioner for Telephone Services
Wilder, Bryant Candidate Development Program Class V (CDP-V)	04/05/15			Deputy Assistant Regional Commissioner for Management and Operations Support (NY) - OPNS	Assistant Regional Commissioner for Management and Operations Support(NY) - OPNS
Rivers Jr, Kenneth			Detail 4/6/15	Associate Commissioner for Telephone Services	Unclassified Duties
King, Michelle			Extension of Detail 4/7/15	Unclassified Duties	Unclassified Duties
Lemon, Wayne			Extension of Detail 4/25/15	Deputy Associate Commissioner for Retirement and Survivors Insurance Systems	Deputy Associate Commissioner for Retirement and Survivors Insurance Systems
Lu, Natalie			Extension of Detail 4/26/15	Associate Commissioner for Retirement Policy	Associate Commissioner for Retirement Policy
Schmidt, Kristi			Extension of Detail 4/30/15	Deputy General Counsel	Deputy General Counsel
Reich, Mary Elizabeth			Detail 5/4/15	Assistant Deputy Commissioner for Budget, Finance, Quality & Management	Assistant Deputy Commissioner for Budget, Finance, Quality & Management
Morenz, John			Extension of Detail 5/5/15	Deputy Chief Technology Officer	Deputy Chief Technology Officer
Kramer, Michael			Extension of Detail 5/11/15	Assistant Deputy Commissioner for Operations	Assistant Deputy Commissioner for Operations
Snyder, Roy			Extension of Detail 5/12/15	Unclassified Duties	Unclassified Duties
King, Michelle			Termination of Detail 5/30/15	Unclassified Duties	Deputy Associate Commissioner for Budget

SES Appointments/Reassignments/Details Within the Last 24 Months - as of 12/14/2016					
Transition Team Member Document--Non-Public Information. This document may be disclosed to Authorized Transition Team Members only.					
Name	Appointment Date	Reassignment Date	Detail Date	Appointed/Reassigned/Detailed From	Appointed/Reassigned/Detailed To
King, Michelle		05/31/15		Deputy Associate Commissioner for Budget	Associate Commissioner for Anti-Fraud Programs
King, Michelle			Detail 6/1/15	Associate Commissioner for Anti-Fraud Programs	Assistant Deputy Commissioner for Finance Assessment Management
Bennett, Cynthia			Extension of Detail 6/4/15	Associate Commissioner for Telephone Services	Associate Commissioner for Telephone Services
Gruber, Theresa			Extension of Detail 6/4/15	Chief Program Officer for Disability Case Processing System	Chief Program Officer for Disability Case Processing System
Lu, Natalie			Termination of Detail 6/14/15	Associate Commissioner for Retirement Policy	Deputy Associate Commissioner for Retirement Policy
Morenz, John			Termination of Detail 6/14/15	Deputy Chief Technology Officer	Associate Commissioner for Enterprise Support, Architecture & Engineering
Morenz, John		06/15/15		Associate Commissioner for Enterprise Support Architecture and Engineering	Deputy Chief Technology Officer
Parry, Dan		06/15/15		Assistant Associate Commissioner for Infrastructure Architecture and Configuration	Associate Commissioner for Enterprise, Support, Architecture & Engineering
Schmidt, Kristi			Termination of Detail 6/26/15	Deputy General Counsel	Regional Chief Counsel (Kansas City)
Kramer, Michael			Termination of Detail 6/27/15	Assistant Deputy Commissioner for Operations	Deputy Regional Commissioner (Kansas City)
Waddell, Tina	06/28/15			Attorney Examiner Administrative Appeals Judge	Senior Advisor to the General Counsel
Waddell, Tina			Detail 6/28/15	Senior Advisor to the General Counsel	General Counsel
Callahan, Daniel			Detail 6/29/15	Deputy Associate General Counsel for General Law	Deputy General Counsel
Min, Royce		07/05/15		Associate Commissioner for Legislation Development and Operations	Assistant Deputy Commissioner for Legislation and Congressional Affairs
Colon-Mollfulleda, Wanda			Extension of Detail 7/6/15	Regional Commissioner (Denver)	Regional Commissioner (Denver)
Hickman, Kate D.	07/12/15			Adm Offcr - Dept. of Agriculture	Assistant Deputy Commissioner for Budget, Finance, Quality, and Management - BFQM
Hansen, Erik CDP-VI	07/12/15			Supervisory Social Insurance Specialist - OLCA	Associate Commissioner for Legislation Development & Operations - OLCA
Garrison-Daniels, Elaine			Detail 7/13/15	Assistant Regional Commissioner for Processing Center Operations (Phil)	Deputy Associate Commissioner for Public Service and Operations Support
Jones, Erik			Detail 7/13/15	Associate Commissioner for Public Service and Operations Support	Assistant Deputy Commissioner for Operations

SES Appointments/Reassignments/Details Within the Last 24 Months - as of 12/14/2016					
Transition Team Member Document--Non-Public Information. This document may be disclosed to Authorized Transition Team Members only.					
Name	Appointment Date	Reassignment Date	Detail Date	Appointed/Reassigned/Detailed From	Appointed/Reassigned/Detailed To
Stricks, Rosemary			Detail 7/13/15	Deputy Associate Commissioner for Public Service and Operations Support	Associate Commissioner for Public Service and Operations Support
Bogle, Darlynda		07/26/15		Deputy Chief Strategic Officer	Executive Secretary
Snyder, Roy			Extension of Detail 8/2/16	Unclassified Duties	Unclassified Duties
Rivers Jr, Kenneth			Extension of Detail 8/4/15	Unclassified Duties	Unclassified Duties
Buehler, Rose Mary		08/09/15		Assistant Regional Commissioner for Processing Center Operations (Atlanta)	Deputy Regional Commissioner (Atlanta)
Horne, Mary		08/09/15		Assistant Regional Commissioner for Management & Operations Support (Phila)	Assistant Deputy Commissioner for Operations
Roland, Van		08/09/15		Assistant Deputy Commissioner for Operations	Assistant Regional Commissioner for Management and Operations Support (Phila)
Taylor, Rodney		08/09/15		Deputy Regional Commissioner (Atlanta)	Regional Commissioner (Atlanta)
Waddell, Tina			Termination of Detail 8/10/15	General Counsel	Senior Advisor to the General Counsel
Borland, James		08/16/15		Assistant Deputy Commissioner for Disability Adjudication & Review	Assistant Deputy Commissioner for Communications
Gambino, Philip		08/16/15		Assistant Deputy Commissioner for Communications	Senior Advisor to the Deputy Commissioner for Operations
Sklar, Glenn		08/16/15		Deputy Commissioner for Disability Adjudication & Review	Senior Advisor to the General Counsel
Gambino, Philip			Detail 8/17/15	Senior Advisor to the Deputy Commissioner for Operations	Unclassified Duties
Sklar, Glenn			Detail 8/17/15	Senior Advisor to the General Counsel	Associate General Counsel for General Law
Gruber, Theresa			Termination of Detail 8/22/15	Chief Program Officer for Disability Case Processing System	Assistant Deputy Commissioner for Operations
Calvert, Donna		08/23/15		Regional Chief Counsel (San Francisco)	Assistant Deputy Commissioner for Disability Adjudication & Review
Davis, Linda			Detail 8/23/15	Assistant Regional Commissioner for Processing Center Operations (Kansas City)	Chief Program Officer for Disability Case Processing System
Gruber, Theresa		08/23/15		Assistant Deputy Commissioner for Operations	Deputy Commissioner for Disability Adjudication & Review

SES Appointments/Reassignments/Details Within the Last 24 Months - as of 12/14/2016					
Transition Team Member Document--Non-Public Information. This document may be disclosed to Authorized Transition Team Members only.					
Name	Appointment Date	Reassignment Date	Detail Date	Appointed/Reassigned/Detailed From	Appointed/Reassigned/Detailed To
Haldiman, Sylviane		08/23/15		Associate Commissioner for Earnings, Enumeration & Administrative Systems	Assistant Deputy Commissioner for Systems (Business Analysis)
Klopp, Robert		08/23/15		Chief Technology Officer	Deputy Commissioner for Systems
Lemon, Wayne			Extension of Detail 8/23/15	Deputy Associate Commissioner for Retirement and Survivors Insurance Systems	Deputy Associate Commissioner for Retirement and Survivors Insurance Systems
Morenz, John		08/23/15		Deputy Chief Technology Officer	Chief Technology Officer
Zielinski, William		08/23/15		Deputy Commissioner for Systems	Senior Advisor to the Deputy Commissioner for Systems
Goble, Christopher		08/30/15		Deputy Associate Commissioner for Disability Determinations	Assistant Associate Commissioner for Disability Operations, Office of Central Operations
Reich, Mary Elizabeth			Termination of Detail 8/31/15	Assistant Deputy Commissioner for Budget, Finance & Management	Assistant Deputy Commissioner for Budget, Finance & Management
Reich, Mary Elizabeth			Detail 9/1/15	Assistant Deputy Commissioner for Budget, Finance & Management	Deputy Commissioner for Budget, Finance, & Management
Zielinski, William			Detail 9/1/15	Senior Advisor to the Deputy Commissioner for Systems	Office of Management and Budget
Gambino, Philip			Termination of Detail 9/4/15	Unclassified Duties	Senior Advisor to the Deputy Commissioner for Operations
Moncada, Kirsten			Detail 9/8/15	Executive Director for Privacy & Disclosure	Office of Management & Budget
Jandrich, Robert			Detail 9/14/15	Assistant Regional Commissioner for Management & Operations Support (Denver)	Associate Commissioner for Executive Operations & Human Resources - ODAR
Julian, James		09/20/15		Associate Commissioner for Executive Operations & Human Resources	Deputy Associate Commissioner for Facilities & Supply Management
Spencer, Melissa CDP-VI	09/20/15			Social Insurance Specialist - BFQM	Deputy Associate Commissioner for Disability Policy - ORDP
Richardson, Samara CDP-VI	09/20/15			Project Leader - OPNS	Deputy Associate Commissioner for Income Security Programs - ORDP
King, Michelle			Extension of Detail 9/29/15	Assistant Deputy Commissioner for Finance Assessment Management	Assistant Deputy Commissioner for Finance Assessment Management
Bennett, Cynthia			Extension of Detail 10/2/15	Associate Commissioner for Telephone Services	Associate Commissioner for Telephone Services
Amrhein, Antoinette		10/04/15		Deputy Associate Commissioner for Earnings, Enumeration & Administrative Systems	Associate Commissioner for Earnings, Enumeration & Administrative Systems

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Callahan, Daniel			Termination of Detail 10/27/15	Deputy General Counsel	Deputy Associate General Counsel for General Law
Jones, Erik			Termination of Detail 10/31/15	Assistant Deputy Commissioner for Operations	Associate Commissioner for Public Service and Operations Support
Stricks, Rosemary			Termination of Detail 10/31/15	Associate Commissioner for Public Service and Operations Support	Deputy Associate Commissioner for Public Service and Operations Support
Callahan, Daniel		11/01/15		Deputy Associate General Counsel for General Law	Deputy General Counsel
Jones, Erik		11/01/15		Associate Commissioner for Public Service and Operations Support	Assistant Deputy Commissioner for Operations
Smith, Phyllis		11/01/15		Deputy Regional Commissioner (Chicago)	Regional Commissioner (Chicago)
Stricks, Rosemary		11/01/15		Deputy Associate Commissioner for Public Service and Operations Support	Associate Commissioner for Public Service and Operations Support
Colon-Mollfulleda, Wanda			Extension of Detail 11/3/15	Regional Commissioner (Denver)	Regional Commissioner (Denver)
Garrison-Daniels, Elaine			Extension of Detail 11/6/15	Deputy Associate Commissioner for Public Service and Operations Support	Deputy Associate Commissioner for Public Service and Operations Support
King, Michelle			Termination of Detail 11/13/15	Assistant Deputy Commissioner for Finance Assessment Management	Associate Commissioner for Anti-Fraud Programs
Reich, Mary Elizabeth			Termination of Detail 11/13/15	Deputy Commissioner for Budget, Finance & Management	Assistant Deputy Commissioner for Budget, Finance & Management
Brune, Sean			Detail 11/16/15	Senior Advisor to the Deputy Commissioner for Budget, Finance, Quality, & Management (Audits)	Assistant Deputy Commissioner for Budget, Finance & Management
King, Michelle			Detail 11/16/15	Associate Commissioner for Anti-Fraud Programs	Deputy Commissioner for Finance Assessment Management
Reich, Mary Elizabeth			Detail 11/16/15	Assistant Deputy Commissioner for Budget, Finance & Management	Deputy Associate Commissioner for Public Service and Operations Support
Jackson, Jean CDP-VI	11/29/15			Division Director - SYSMS	Deputy Associate Commissioner for Disability Systems- SYSMS
Snyder, Roy			Extension of Detail 11/30/15	Unclassified Duties	Unclassified Duties
Rivers Jr, Kenneth			Extension of Detail 12/2/15	Unclassified Duties	Unclassified Duties
Sklar, Glenn			Extension of Detail 12/15/15	Associate General Counsel for General Law	Associate General Counsel for General Law
Davis, Linda			Extension of detail 12/21/15	Chief Program Officer for Disability Case Processing System	Chief Program Officer for Disability Case Processing System



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Lemon, Wayne			Extension of Detail 12/21/15	Deputy Associate Commissioner for Retirement and Survivors Insurance Systems	Deputy Associate Commissioner for Retirement and Survivors Insurance Systems
Wilder, Bryant Candidate Development Program Class V (CDP-V)		12/27/15		Assistant Regional Commissioner for Management and Operations Support (NY)	Deputy Regional Commissioner (NY)
Sklar, Glenn			Termination of Detail 1/3/16	Associate General Counsel for General Law	Senior Advisor to the General Counsel
Sklar, Glenn			Detail 1/4/16	Senior Advisor to the General Counsel	Executive Director for Public Disclosure
Kramer, Michael		01/10/16		Deputy Regional Commissioner (Kansas City)	Regional Commissioner (Kansas City)
Lemon, Wayne			Termination of Detail 1/10/16	Deputy Associate Commissioner for Retirement and Survivors Insurance Systems	Senior Advisor to the Associate Commissioner for Retirement and Survivors Insurance Systems
Tracht, Nadine CDP-VI	01/10/16			Staff Director - SYSMS	Deputy Associate Commissioner for IT Financial Management & Support - SYSMS
Davis, Linda		01/11/16		Assistant Regional Commissioner for Processing Center Operations (Kansas City)	Deputy Regional Commissioner (Kansas City)
Jackson, Jean CDP-VI			Detail 1/11/16	Deputy Associate Commissioner for Disability Systems	Associate Commissioner for Earnings, Enumeration & Administrative Systems
Lemon, Wayne			Detail 1/11/16	Senior Advisor to the Associate Commissioner for Retirement and Survivors Insurance Systems	Associate Commissioner for Systems Electronic Services
Martinez, William			Detail 1/11/16	Deputy Associate Commissioner for Central Operations	Associate Commissioner for Programmatic Business Support
Stewart, Valecia			Detail 1/11/16	Deputy Associate Commissioner for Electronic Services & Technology	Deputy Associate Commissioner for Central Operations
Biro, Frank			Detail 1/12/16	Associate Commissioner for Disability Adjudication & Review	Unclassified Duties
Jandrllich, Robert			Extension of Detail 1/12/16	Associate Commissioner for Executive Operations & Human Resources	Associate Commissioner for Executive Operations & Human Resources
Garrison-Daniels, Elaine			Termination of Detail 1/17/16	Deputy Associate Commissioner for Public Service and Operations Support	Assistant Regional Commissioner for Processing Center Operations Support (Phila)
Bennett, Cynthia			Extension of Detail 1/30/16	Associate Commissioner for Telephone Services	Associate Commissioner for Telephone Services
Eckert, Marti		02/07/16		Deputy Associate Commissioner for Telecommunications & Systems Operations	Associate Commissioner for Information Security
Walker, Janet		02/21/16		Assistant Regional Commissioner for Management Operations Support (Atlanta)	Deputy Regional Commissioner (Chicago)
Phillips, John	02/21/16			Supervisory HAS - DHHS - NIH	Associate Commissioner for Research Evaluation & Statistics - ORDP

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Colon-Mollfulleda, Wanda			Extension of Detail 3/2/16	Regional Commissioner (Denver)	Regional Commissioner (Denver)
Zielinski, William			Termination of Detail 3/5/16	OMB	Senior Advisor to the Deputy Commissioner for Systems
Brune, Sean			Extension of Detail 3/15/16	Assistant Deputy Commissioner for Budget Finance & Management	Assistant Deputy Commissioner for Budget Finance & Management
King, Michelle			Extension of Detail 3/15/16	Deputy Commissioner for Finance Assessment Management	Deputy Commissioner for Finance Assessment Management
Reich, Mary Elizabeth			Extension of Detail 3/15/16	Deputy Associate Commissioner for Public Service and Operations Support	Deputy Associate Commissioner for Public Service and Operations Support
Snyder, Roy			Extension of Detail 3/29/16	Unclassified Duties	Unclassified Duties
Rivers Jr, Kenneth			Extension of Detail 3/31/16	Unclassified Duties	Unclassified Duties
Davis, Linda			Extension of Detail 4/17/16	Chief Program Officer for Disability Case Processing System	Chief Program Officer for Disability Case Processing System
Schaffer, Steven		05/01/16		Assistant Inspector General for Audit	Chief of Staff (OIG)
Sklar, Glenn			Extension of Detail 5/3/16	Executive Director for Public Disclosure	Executive Director for Public Disclosure
Stewart, Valecia			Termination of Detail 5/9/16	Deputy Associate Commissioner for Central Operations	Deputy Associate Commissioner for Electronic Services and Technology - OPNS
Jackson, Jean CDP-VI			Extension of Detail 5/10/16	Associate Commissioner for Earnings, Enumeration & Administrative Systems	Associate Commissioner for Earnings, Enumeration & Administrative Systems
Martinez, William			Extension of Detail 5/10/16	Associate Commissioner for Programmatic Business Support	Associate Commissioner for Programmatic Business Support
Biro, Frank			Extension of Detail 5/11/16	Unclassified Duties	Unclassified Duties
Jandrllich, Robert			Extension of Detail 5/11/16	Associate Commissioner for Executive Operations & Human Resources - ODAR	Associate Commissioner for Executive Operations & Human Resources
Martinez, William			Termination of Detail 5/14/16	Associate Commissioner for Programmatic Business Support	Deputy Associate Commissioner for Central Operations
Lawson, Rona		05/15/16		Deputy Assistant Inspector General for Audit (Program Audits and Evaluations)	Assistant Inspector General for Audit



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Martinez, William		05/15/16		Deputy Associate Commissioner for Central Operations	Senior Advisor to the Deputy Commissioner for Systems
Richardson, Samara CDP-VI		05/15/16		Deputy Associate Commissioner for Income Security Programs	Associate Commissioner for Income Security Programs
Stewart, Valecia		05/15/16		Deputy Associate Commissioner for Electronic Services & Technology	Deputy Associate Commissioner for Central Operations
Bennett, Cynthia			Extension of Detail 5/29/16	Associate Commissioner for Telephone Services	Associate Commissioner for Telephone Services
Biro, Frank			Extension of Detail 6/11/16	Unclassified Duties	Unclassified Duties
Reich, Mary Elizabeth			Termination of Detail 6/11/16	Deputy Associate Commissioner for Public Service and Operations Support	Assistant Deputy Commissioner for Budget, Finance & Management
Reich, Mary Elizabeth		06/12/16		Assistant Deputy Commissioner for Budget, Finance & Management	Deputy Associate Commissioner for Public Service and Operations Support
Gower, Adam CDP-V	06/12/16			Center Director - OHR	Deputy Associate Commissioner for Personnel - OHR
King, Michelle			Termination of Detail 6/25/16	Deputy Commissioner for Finance Assessment Management	Associate Commissioner for Anti-Fraud Programs
Fellona, Thomas		06/26/16		Assistant Associate Commissioner for Enterprise IT Operations & Security	Associate Commissioner for Systems Operations
Grzymiski, Thomas		06/26/16		Associate Commissioner for Telecommunications & Systems Operations	Assistant Deputy Commissioner for Systems (Systems Operations and Hardware Engineering)
King, Michelle		06/26/16		Associate Commissioner for Anti-Fraud Programs	Deputy Commissioner for Budget, Finance, Quality, & Management
Medley-Proctor, Kristen		06/26/16		Associate Commissioner for Personnel	Executive Director for Strategic Human Capital Management
Thomas, David		06/26/16		Assistant Associate Commissioner for Enterprise IT Services Management	Associate Commissioner for Hardware Engineering
Bowles, Howard CDP-VII	06/26/16			Social Insurance Administrator (Atlanta) - OPNS	Assistant Regional Commissioner (Atlanta) - OPNS
Glenn, Karen	06/26/16			Executive Officer - OACT	Deputy Chief Actuary (Long Range) - OACT
Colon-Mollfulleda, Wanda			Extension of Detail 6/30/16	Regional Commissioner (Denver)	Regional Commissioner (Denver)
Bhargava, Anju		07/10/16		Deputy Chief Strategic Officer	Senior Advisor to the Deputy Commissioner for Human Resources
Bostick Borden, Vera		07/10/16		Deputy Associate Commissioner for Quality Review	Associate Commissioner for Quality Review

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Egan, Ray CDP-VI	07/10/16			Deputy Assistant Regional Commissioner for Management and Operations Support (NY) - OPNS	Assistant Regional Commissioner (NY) - OPNS
Bhargava, Anju			Detail 7/11/16	Senior Advisor to the Deputy Commissioner for Human Resources	Unclassified Duties - OQR
Biro, Frank			Extension of Detail 7/11/16	Unclassified Duties	Unclassified Duties
Brune, Sean			Extension of Detail 7/13/16	Assistant Deputy Commissioner for Budget, Finance, & Management	Assistant Deputy Commissioner for Budget, Finance, & Management
Wilhite, Dennis CDP-VII	07/24/16			Supervisory Budget Analyst - BFQM	Deputy Associate Commissioner for Disability Determinations - OPNS
Snyder, Roy			Extension of Detail 7/27/16	Unclassified Duties	Unclassified Duties
Rivers Jr, Kenneth			Extension of Detail 7/29/16	Unclassified Duties	Unclassified Duties
Jandrich, Robert			Termination of Detail 8/6/16	Associate Commissioner for Executive Operations & Human Resources	Assistant Regional Commissioner for Management Operations Support (Denver)
Jandrich, Robert		08/07/16		Assistant Regional Commissioner for Management Operations Support (Denver)	Associate Commissioner for Executive Operations & Human Resources -ODAR
Walker, Janet		08/07/16		Deputy Regional Commissioner (Chicago)	Associate Commissioner for Public Service and Operations Support
Davis, Linda			Extension of Detail 8/15/16	Chief Program Officer for Disability Case Processing System	Chief Program Officer for Disability Case Processing System
Garrigues, John	08/21/16			Supervisory IT Specialist - SYSMS	Assistant Associate Commissioner for Infrastructure Architecture & Configuration- SYSMS
Foley, Dennis	08/21/16			Deputy Associate General Counsel - OGC	Deputy Associate General Counsel for Program Law - OGC
Stachel, Deborah	08/21/16			Deputy Regional Chief Counsel (San Francisco) - OGC	Regional Chief Counsel (San Francisco) - OGC
Caldwell, Kathryn	08/21/16			Deputy Regional Chief Counsel (Chicago) - OGC	Regional Chief Counsel (Chicago) - OGC
Bowles, Bernard	08/21/16			Executive Officer (NY) - OPNS	Assistant Regional Commissioner for Processing Center Operations (NY) - OPNS
Hall, Frankie B.	08/21/16			Deputy Assistant Regional Commissioner for Processing Center Operations (Atlanta) - OPNS	Assistant Regional Commissioner for Processing Center Operations (Atlanta) - OPNS
Garrigues, John			Detail 8/22/16	Assistant Associate Commissioner for Infrastructure Architecture & Configuration	Deputy Chief Program Officer for Disability Case Processing System
Biro, Frank			Extension of Detail 8/31/16	Unclassified Duties	Unclassified Duties

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Sklar, Glenn			Extension of Detail 8/31/16	Executive Director for Public Disclosure	Executive Director for Public Disclosure
Marshall, Lydia		09/04/16		Associate Commissioner for Learning	Associate Commissioner for Personnel
Koch, Nora	09/04/16			Deputy Regional Chief Counsel (Phil) - OGC	Regional Chief Counsel (Phil) - OGC
Lopez, Joe CDP-VII	09/04/16			Social Insurance Administrator - OPNS	Deputy Chief of Staff - OC
Pelgro, Michael	09/06/16			NonFed	Regional Chief Counsel (Boston) - OGC
Jackson, Jean CDP-VI			Extension of Detail 9/7/16	Associate Commissioner for Earnings, Enumeration & Administrative Systems	Associate Commissioner for Earnings, Enumeration & Administrative Systems
Moncada, Kirsten			Extension of Detail 9/8/16	OMB	OMB
Brune, Sean			Termination of Detail 9/17/16	Assistant Deputy Commissioner for Budget, Finance & Management	Senior Advisor to the Deputy Commissioner for Budget, Finance, Quality, & Management (Audits)
Brune, Sean		09/18/16		Senior Advisor to the Deputy Commissioner for Budget, Finance, Quality, & Management (Audits)	Assistant Deputy Commissioner for Budget, Finance, Quality, & Management
Debelius, Kleophili CDP-VII	09/18/16			Staff Director - SYSMS	Deputy Associate Commissioner for Applications and Supplemental Security Income Systems- SYSMS
Lytle, Joseph CDP-VII	09/18/16			Director - ODAR	Deputy Associate Commissioner for Budget, Facilities and Security, ODAR
Lemon, Wayne	09/18/16			Division Director - SYSMS	Deputy Associate Commissioner for Retirement and Survivors Insurance Systems - SYSMS
Sanders Sparks, Cynthia Michelle CDP-VII	09/18/16			Center Director (KC)	Assistant Regional Commissioner for Processing Center Operations (KC) - OPNS
Bennett, Cynthia			Termination of Detail 9/26/16	Associate Commissioner for Telephone Services	Deputy Associate Commissioner for Customer Service - OPNS
Colon-Mollfulleda, Wanda			Termination of Detail 9/30/16	Regional Commissioner (Denver)	Deputy Regional Commissioner (Denver)
Robert, Ann		09/30/16		Associate Commissioner for Disability Determinations	Assistant Regional Commissioner for Management Operations Support (Chicago)
Snyder, Roy			Termination of Detail 9/30/16	Unclassified Duties	Deputy Associate Commissioner for Public Service & Operations Support
Biro, Frank			Extension of Detail 10/1/16	Unclassified Duties	Unclassified Duties
Rivers Jr, Kenneth			Termination of Detail 10/1/16	Unclassified Duties	Associate Commissioner for Telephone Services
Flick, Brad		10/02/16		Assistant Regional Commissioner for Management Operations Support (Chicago)	Deputy Regional Commissioner (Chicago)
Lewandowski, Mary Lisa		10/02/16		Assistant Regional Commissioner for Management Operations Support (Seattle)	Deputy Regional Commissioner (Seattle)

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Martinez, William		10/02/16		Senior Advisor to the Deputy Commissioner for Systems	Associate Commissioner for IT Programmatic Business Support
Cumming, Kendra CDP-IV	10/02/16			DCO Staff Director for Human Resources- OPNS	Deputy Associate Commissioner for Public Service and Operations Support - OPNS
Sparks, Kimberly	10/02/16			Deputy Associate Commissioner for Electronic Services & Technology	Deputy Associate Commissioner for Electronic Services and Technology - OPNS
Moya, Rafael CDP-VII	10/02/16			Social Insurance Administrator (San Francisco)	Associate Commissioner for Anti-Fraud Programs - BFQM
Owen, John CDP-VII	10/02/16			Senior Advisor for Disability Determinations- OPNS	Associate Commissioner for Disability Determinations - OPNS
Lane, Hugh			Detail 10/24/16	Executive Director for Open Government	Deputy Chief Strategic Officer
Bennett, Cynthia		10/30/16		Deputy Associate Commissioner for Customer Service	Associate Commissioner for Customer Service
Schofield, Jeremiah CDP-VII	10/16/16			Deputy Associate Commissioner for Facilities Management - BFQM	Deputy Associate Commissioner for Public Service and Operations Support - OPNS
Biro, Frank			Extension of Detail 11/1/16	Unclassified Duties	Unclassified Duties
Garrigues, John		11/13/16		Assistant Associate Commissioner for Infrastructure Architecture & Configuration	Deputy Chief Technology Officer
Waddell, Tina		11/13/16		Senior Advisor to the General Counsel	Assistant Deputy Commissioner for Human Resources
Cardona, Delma CDP-VII	10/30/16			Division Director - OPNS	Deputy Associate Commissioner for Customer Service - OPNS
Lambert, Kishayra CDP-VII	11/13/16			Senior Technical Advisor - BFQM	Deputy Associate Commissioner for Systems Operations - SYSMS
Wiggins, Dawn CDP-VII	11/13/16			Deputy Executive Director for Privacy & Disclosure - OGC	Deputy Associate Commissioner for Income Security Programs - ORDP
Barrett, Christopher CDP-VII	11/27/16			Division Director - BFQM	Associate Commissioner for IT Financial Management and Support - SYSMS
Train, Laura		12/11/2016		Associate Commissioner for Communications Planning & Technology	Associate Commissioner for Learning
Davis, Linda			Extension of Detail 12/13/16	Chief Program Officer for Disability Case Processing System	Chief Program Officer for Disability Case Processing System

## **Revisions to Rules of Conduct and Standards of Responsibility for Appointed Representatives**

On August 16, 2016, the Social Security Administration (SSA) published a Notice of Proposed Rulemaking (NPRM) proposing changes to our current rules of conduct and standards of responsibility for appointed representatives. We are proposing these changes based on our concerns that some representatives are using our processes in a way that undermines the integrity of our programs. The revised rules clarify that certain actions are prohibited and provide additional means to address representative actions affecting our ability to provide the best possible public service.

While the current regulations set forth a standard of conduct for individuals who represent claimants before SSA, the proposed regulatory changes more clearly define this standard by adding several affirmative duties and prohibited actions such as conduct that we have seen but could not address under existing rules, including representatives withdrawing from representation shortly before the hearing was to be held. The changes also clarify the Office of Disability Adjudication and Review's (ODAR) procedures for processing representative sanction hearings and appeals.

### **The proposed regulatory changes clarify standards for non-attorney representatives.**

- We proposed adding examples of situations, such as felony convictions, in which non-attorneys "lack good character and reputation," which may demonstrate to us that a non-attorney is unqualified to serve as a representative.
- Under the proposed rules, we may disqualify a non-attorney representative who has been removed from practice or suspended by a professional licensing authority for reasons that reflect on the person's character, reliability or fitness to serve.

### **The proposed regulatory changes include affirmative duties and prohibited actions to clarify our expectations regarding representatives' obligations to their clients.**

- The regulatory changes require representatives to provide dates and times for hearing availability; withdraw in a manner that does not disrupt case processing; and maintain prompt and timely communication with claimants.
- The proposed rules require representatives to disclose whether a medical or vocational opinion is drafted, prepared, or issued by an employee or contractor of the representative, and whether the representative referred the claimant for treatment.
- The proposed rules require disclosure if a representative has been disbarred, removed or suspended from practice, or if a claimant uses the representative's services to commit fraud against the agency.
- Under the proposed rules, representatives are prohibited from misleading a claimant, submitting misleading evidence, and contacting agency employees outside the normal course of business.

### **The proposed regulatory changes clarify and modify for processing efficiency procedures involving charges against representatives.**

- We propose reducing the time a representative has to respond to charges or request Appeals Council review from 30 to 14 days.
- We propose clarifying that hearings and appeals may be conducted at our discretion in person, by video teleconferencing, or by telephone.
- We propose revising the current regulations to state that a representative who has been disqualified or sanctioned and has been denied reinstatement must wait three years before again requesting reinstatement, rather than the existing waiting period of one year.

**Return on Investment on Program Integrity Activities**  
**Prepared by the Office of Budget, Finance, Quality and Management**  
**December 1, 2016**

Program Integrity Activities		
	Activity	Return on Investment
<b>BBA PI Activities</b>	CDR	\$8 on average per \$1 budgeted
	RZ	\$3 on average per \$1 budgeted
	CDI Units	\$14 per \$1 spent
	SAUSA Fraud Prosecutors	\$6 in restitution returns per \$1 spent
<b>Non-BBA PI Activities</b>	PER	\$11 per \$1 spent

**NOTES**

1a. Continuing Disability Reviews (CDR): Based on the assumptions inherent in the FY 2017 President's Budget, SSA estimates that medical CDRs conducted in 2017 will yield net Federal program savings over the next 10 years of roughly \$8 on average per \$1 budgeted for dedicated program integrity funding, including the Old Age, Survivors, and Disability Insurance (OASDI), Supplemental Security Income (SSI), Medicare and Medicaid program effects.

1b. Redeterminations (RZ): Similarly, based on the assumptions inherent in the FY 2017 President's Budget, SSA estimates indicate that non-medical RZs conducted in 2017 will yield a ROI of about \$3 on average of net Federal program savings over 10 years per \$1 budgeted for dedicated program integrity funding, including SSI and Medicaid program effects.

1c. Cooperative Disability Investigation Units (CDI Units): The Office of the Inspector General determined this return of investment and shared with the U.S. House Subcommittee on Social Security. *See Protecting Social Security from Waste, Fraud, and Abuse: Hearing Before the Subcomm. on Social Security of the H. Comm. on Ways & Means*, 114th Cong. 4 (2016) (statement of Patrick P. O'Carroll, Jr., Inspector Gen. of the Social Security Administration). This is not an official estimate of program savings by the Office of the Chief Actuary.

1d. Special Assistant United States Attorneys (SAUSA) Fraud Prosecutors: In recent years, we have expanded the number of SAUSA fraud prosecutors as part of the Fraud Prosecution Project. These attorneys are focused on prosecuting SSA-related fraud cases at the Department of Justice. This return on investment reflects total restitution compared to administrative cost for these attorneys in FY 2016.

1e. Pre-Effectuation Reviews (PER): This return on investment is for FY 2014. We review at least 50 percent of all State DDS initial and reconsideration allowances of applicants for Old-Age, Survivors, and Disability Insurance benefits based on disability. We also review a sufficient number of OASDI medical CDR continuances. These reviews are not paid for by dedicated program integrity funding, as authorized by the Budget Control Act of 2011 and the Bipartisan Budget Act of 2015.



2. The Budget Control Act of 2011 (BCA) provided that SSA may be granted specified dollar amounts of additional budget authority each year for program integrity activities over and above the agency's standard operating budget. *See* Budget Control Act of 2011, Pub. L. No. 112-25, § 101, 125 Stat. 240, 243-244 (amending the Balanced Budget and Emergency Deficit Control Act of 1985, § 251) *Id.* The BCA limited this additional funding for the cost of performing CDRs and RZs. *Id.* The Bipartisan Budget Act of 2015 (BBA) amended the BCA by adding higher amounts for program integrity through FY 2021 and expanding the use of those funds to include cooperative disability investigation units (CDI units) and Special Assistant United States Attorneys (SAUSA). *See* Bipartisan Budget Act of 2015, Pub. L. No. 114-74, § 815, 129 Stat. 584, 604.
3. The return on investment from program integrity activities strictly represents estimated benefit savings, i.e. an estimated amount of benefits that will not have to be paid from the Social Security Trust Funds or the general fund of the Treasury in the future. Therefore, there are no real dollars returned to our administrative account to cover the costs associated with program integrity activities.
4. The SSA program integrity savings from the Bipartisan Budget Act (BBA) of 2015 were used to offset costs of other portions of that bill.

**Q: “What percentage of the population files for early retirement if defining early retirement as any application before FRA?”**

A: Table 6.B51 in SSA’s Annual Statistical Supplement (<https://www.ssa.gov/policy/docs/statcomps/supplement/2016/6b.html#table6.b5.1>) shows that approximately **68 percent of new retired-worker benefit claims were filed before FRA for men and 75 percent for women when excluding the disabled**, who automatically convert to retired-worker benefits at FRA.

SSA staff member Pat Purcell’s paper, “[Employment at Older Ages and Social Security Benefit Claiming](#)” explains these trends in more detail. **Here are the rationales:**

**Table 6.B5.1—Number, average age, and percentage distribution, by sex and age at entitlement, 1998–2015**

Year of entitlement	Number (thousands)	Average age	Percentage distribution by age at month of entitlement											
			Total, all ages	62	63	64	65 <sup>a</sup>			66 <sup>a</sup>		Disability conversions <sup>b</sup>	67–69	70 or older
							Before FRA	At FRA	After FRA	At FRA	After FRA			
Men														
2015	1,391	64.4	100.0	33.1	6.3	5.9	10.5	...	...	17.4	3.1	17.7	3.9	2.2
Women														
2015	1,286	64.2	100.0	38.9	6.7	6.9	10.4	...	...	12.1	2.1	16.5	3.1	3.4

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

**Below is the re-calculation when excluding disability conversions, which changes the denominator and the percentages.**

Men:

100= total

100-17.7(disability) = 82.3 = total minus DI conversions at FRA

33.1+6.3+5.9+10.5=55.8=retired worker claims before FRA

55.8/82.3=**67.8%** = Percent of NEW retired worker claims before FRA for men

Eg. 33.1/82.3=40.2% = percent of new retired worker claims at age 62 for men



Women:

100= total

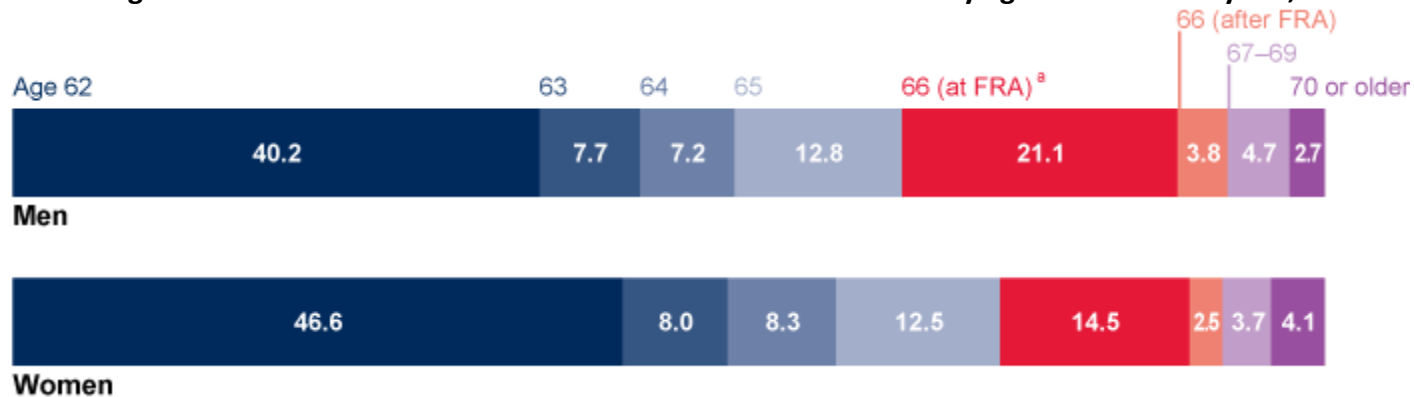
$100 - 16.5 = 83.5$  = total minus DI conversions at FRA

$38.9 + 6.7 + 6.9 + 10.4 = 62.9$  = retired worker claims before FRA

$62.9 / 83.5 = 75.3\%$  = Percent of NEW retired worker claims before FRA for women

Eg.  $38.9 / 83.5 = 46.6\%$  = percent of new retired worker claims at age 62 for women

**Percentage distribution of nondisabled retired-worker benefit awards by age of claimant: By sex, 2015**



SOURCE: Authors' calculations based on SSA (2016a, Table 6.B5.1).

NOTES: Data are shown by age at entitlement. Entitlement may be retroactive and therefore precede the award date.

Rounded components of percentage distributions do not sum to 100.0.

a. In the first month of age 66.

Prepared by the Office of Retirement and Disability Policy / Office of the Chief Actuary

<b>Pending “Major” Contracts Anticipated to be Awarded in the Next 90 days (greater than \$10 million)</b>	
<b>Acquisition</b>	<b>Contract Term</b>
Desktop and Network Printer Blanket Purchase Agreement	5 years (1-year base period plus four 1-year option periods)
IBM Software and Maintenance Contract	5 years (1-year base period plus four 1-year option periods)
IT Support Services Contract (ITSSC2)	10 years (2-year base period plus four 2-year option periods)
Promoting Opportunities Demonstration Evaluation	5 years
Promoting Opportunities Demonstration Implementation	4.5 years plus 6-month option period
Red Hat Software and Maintenance Blanket Purchase Agreement	5 years (1-year base period plus four 1-year option periods)
Architect-Engineer Indefinite-Delivery/Indefinite-Quantity Contract -- Nationwide	5 years (1-year base period plus four 1-year option periods)
Mechanical Maintenance Contract for Data Operations Center in Wilkes Barre, PA	5 years (1-year base period plus four 1-year option periods)

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# Notice of Proposed Rulemaking (NPRM), Implementation of the NICS Improvement Amendments Act of 2007

## Overview of Public Comment Information

### General Background Information

- The NICS NPRM published on May 5, 2016. The public comment period was open from May 5 through July 5, 2016.

### Comment Statistics

- Total number of comments received: **91,288**
- Total number of comments redacted or not posted (due to vulgarity, profanity, abusive language, duplicate comments submitted by the same commenter, empty comments, or comments without any relevance to the subject matter of the proposed regulation): **45**
- Actual total number of comments accepted (91,288 submissions – 45 redactions/no posts): **91,243 comments**
- Of these 91,243 comments:
  - **86,860** *were duplicate paper comments with different names organized by one organization (the National Association for Gun Rights). Per the guidance of our Office of the General Counsel, we scanned and posted one of these comments on the Federal Document Management System (FDMS) and disclosed how many copies of the document we had received.*
  - **324** commenters signed one comment letter;
  - **4,059** *comments were posted on FDMS:*
    - **49** comments were from advocacy groups, including disability rights, mental-health advocacy, gun-rights, gun control, legal, medical, and special-interest organizations.
    - **4,010** comments were from individuals:
      - **1,434** comment submissions were unique.
      - Approximately **2,576** comments appeared to be duplicates; an online search revealed the text of these comments was suggested by a gun-rights group, the Gun Owners of America.

NICS NPRM Overview of Comments

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Table 1. Summary of Comment Statistics.

Total Number of Comments Received	91,288
Total Number of Comments Redacted/Not Posted	45
<b>Total Number of Comments Accepted</b>	<b>91,243</b>
Total Number of Duplicate Paper Comments from National Association for Gun Rights	86,860
Total Number of Signatures on Individual Comment Letter	324
Unique Submitter Comments Posted on FDMS	4,059
From FDMS Total, Number of Comments from Advocacy Groups	49
From FDMS Total, Number of Comments from Individuals	1,434
From FDMS Individuals, Number of Unique Comments	4,010
From FDMS Individuals, Number of Identical Comments	2,576

Table 2. Advocacy Groups Who Submitted Comments.

**Disability Rights and Mental-Health Advocacy Groups**

<b>Group Name</b>	<b>Reaction to Rule</b>
Ability360	Oppose
Alaska - Governor's Council on Disabilities and Special Education	Oppose
ARISE	Oppose
Assistance to the Incarcerated Mentally Ill	Oppose
Autistic Self Advocacy Network	Oppose
Bazelon Center for Mental Health	Oppose
Center for Disability Rights	Oppose
Children's Psychological Health Center	Oppose
Consortium for Citizens with Disabilities	Oppose
Disability Law Center of Alaska	Oppose
Disability Law Center of Utah	Oppose
Disability Network Southwest Michigan	Oppose
Disability Rights California	Oppose
Disability Rights of Florida	Oppose
Disability Rights New Jersey	Oppose
Disability Rights North Carolina	Oppose
Emergence Health Network	Oppose
Finger Lakes Independence Center	Oppose
Independent Living Council of Wisconsin	Oppose
Independent Living, Inc.	Oppose
Independent Living Resources	Oppose
Maryland Disability Law Center	Oppose
Mental Health America	Oppose
Mental Health America of Los Angeles	Oppose
NAMI	Oppose

NICS NPRM Overview of Comments

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National Council on Disability (NCD)	Oppose
National Council on Independent Living (NCIL)	Oppose
National Organization of Social Security Claimants Representatives (NOSSCR)	Oppose
North Central Independent Living Services, Inc.	Oppose
Pennsylvania Mental Health Consumers' Association	Oppose
Tri-County Independent Living Center, Inc.	Oppose
Uniting Disabled Individuals, Inc.	Oppose
Vermont Center for Independent Living	Oppose
Warmline, Inc.	Oppose
Washington Metro Disabled Students Collective	Oppose

### ***Gun Owner and Second Amendment Right Groups***

<b>Group Name</b>	<b>Reaction to Rule</b>
Gun Owners of America	Oppose
National Association for Gun Rights	Oppose
National Rifle Association-Institute for Legislative Action (NRA-ILA)	Oppose

### ***Gun Control Groups***

<b>Group Name</b>	<b>Reaction to Rule</b>
Brady Campaign	Support
Coalition to Stop Gun Violence	Support
Consortium for Risk-Based Firearm Policy	Support
Everytown for Gun Safety	Support
Law Center to Prevent Gun Violence and Americans for Responsible Solutions	Support

### ***Legal Interest Organizations***

<b>Group Name</b>	<b>Reaction to Rule</b>
American Civil Liberties Union (ACLU)	Oppose
CATO Institute	Oppose
Connecticut Legal Rights Project, Inc.	Oppose
United States Justice Foundation	Oppose

### ***Medical Organization***

American Psychological Association (Oppose)

### ***Other Advocacy Group***

National LGBTQ Task Force (Oppose)

NICS NPRM Overview of Comments

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## **Commenter Concerns by Category**

### **Legal Authority**

Comment: Multiple individuals questioned our authority to report any information to the National Instant Criminal Background Check System (NICS) database. Some commenters opined that the NICS Improvement Amendments Act of 2007 (NIAA) section 101(c)(1)(C) prohibited us from reporting information to the Department of Justice (DOJ) that is “based solely on a medical finding of disability. . . .” Another commenter suggested that we should not be able to submit any medical information to the NICS without a court order.

Comment: Multiple commenters questioned our authority to declare an individual to be subject to the Federal mental health prohibitor, and argued that only a court can make that decision.

Comment: One commenter asked if the determinations would be secret or open, and if there are safeguards in place to ensure that the people making the designations are free of bias or prejudice.

### **Constitutional Issues: Second Amendment and Equal Protection**

Comment: Many commenters expressed concern that these rules would violate the affected individuals’ rights under the Second Amendment to the Constitution, and would also violate their equal protection rights under the Constitution. Most of these comments were provided in largely identical letters, and they asserted that our rules would take firearms away from elderly recipients of Social Security retirement benefits.

### **Due Process**

Comment: Multiple commenters also stated that the rules as written would violate beneficiaries' right to due process, particularly because they do not allow affected individuals to appeal the inclusion of their names in the NICS before we submit them to the DOJ. One commenter suggested that we should obtain a beneficiary's written permission before submitting information to the DOJ.

Comment: Several commenters questioned whether individuals who meet our criteria would receive adequate notice or be given the opportunity to appeal before we share their information with the DOJ. One commenter expressed concern that, "[m]any people will not be informed of the action." Other commenters asked whether "an existing beneficiary with a representative payee [would] be notified and given the opportunity to appeal before they are reported to NICS" or if we would "allow the person a reasonable amount of time to appeal that action."

Comment: Several commenters expressed the belief that pursuing relief would be a highly expensive process for beneficiaries, and thus beneficiaries who could not afford what might be prohibitively expensive activities, would effectively be denied due process.

### Reporting Criteria

Comment: Multiple individuals commented on the criteria we proposed for identifying individuals whose names we would report to the DOJ. Many questioned how we selected these criteria for inclusion. One commenter suggested that, "there should be a more specific review of these criteria." Another individual asked why we did not propose to send information on individuals who, among other things, are felons, domestic abusers, or unlawful users of controlled substances. Another commenter suggested that we conduct a criminal background history as an additional step prior to reporting an individual's information to the DOJ. One

commenter suggested that we include an additional factor to consider an individual's propensity for violence, aggressive behavior, or self-destructive behavior<sup>1</sup>.

Comment: Several commenters protested against what they thought would be our evaluation of all Social Security beneficiaries for potential inclusion in the NICS.

Comment: We received a significant number of comments expressing the view that we should not report certain categories of people to the DOJ for inclusion in the NICS based solely on one qualifier. Commenters erroneously expressed the belief that we would report names to the NICS if they belonged to any one of the following categories: (1) Recipients of any type of Social Security benefits; (2) recipients of Supplemental Security Income (SSI) payments or Disability Insurance (DI) beneficiaries under the Social Security Act; (3) senior citizens; (4) DI beneficiaries for other physical, non-mental disabilities; (5) DI beneficiaries based on a mental impairment, but who do not have a representative payee; (6) have a representative payee for retirement benefits but do not receive DI benefits; (7) have a representative payee but do not receive DI benefits because of a listing-level mental impairment; or (8) no longer receive any type of Social Security benefits.

Comment: One commenter stated that, because we do not make medical determinations about Social Security retirement beneficiaries' health, we do not have the right to make decisions concerning their mental status.

Comment: Multiple commenters expressed the belief that we would report beneficiaries to the NICS solely based on their having a representative payee. Further, commenters opined that having an alternate payee,

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<sup>1</sup> One commenter raised the issue of our reporting felons to the NICS database. This issue is outside the scope of this final rule.



or requiring some help with financial arrangements such as receipt of Social Security benefits, does not demonstrate mental incompetence.

Comment: Several individuals expressed concern that we would decide to expand the categories of names to submit to the NICS beyond the scope of the current rules without justification or prior notice.

## Mental Illness

### Connection to Violence, Potential for Stigmatization

Comment: Commenters questioned the decision to add beneficiaries' names to the NICS based on mental illness, stating we had not provided data indicating that mental illness was a precursor for violence (particularly gun violence).

Comment: Multiple commenters opined that these rules would unfairly stigmatize those with mental illness.

Comment: Some commenters expressed concern that individuals might choose not to seek mental health treatment or apply for Social Security benefits out of fear that we would submit their information to the DOJ for inclusion in the NICS. One commenter stated that, "[t]he end result of this will be many will be very reluctant to seek help, and will refuse the help of a payee, if that is to be automatically reported in this way." Another commenter suggested that, "[o]ne unintended consequence of the proposed action will be to introduce a tremendous disincentive to those who would seek medical assistance."

## Mental Illness Determination

NICS NPRM Overview of Comments

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Comment: We received several comments questioning how we determine whether individuals are disabled based on their diagnosed mental disorders. One commenter stated that, "[t]he parameters established within this rule are entirely too vague." The commenter went on to opine that the proposed rules rely on factors that are "severely error-prone," suggesting that our system "'red flags' too many claims based simply on the mentioning of certain terms (i.e. 'red flagging' claims as 'suicidal' based solely on the term 'suicide' within a person's records. . . even if the actual reference is 'claimant states he does not have any suicidal ideations.'") Another commenter stated that we do not explain the severity required to satisfy a mental disability listing.

Comment: Multiple commenters stated that, because our adjudication of an individual as disabled under our mental disorders listings causes the individual's name to be included in the NICS, commenters' perceived flaws in the adjudication process could lead to unfair inclusion in the NICS. Concerns were raised about the ability of our employees to participate in what seems to be a medical decision. Commenters also discussed the possible lack of input by medical professionals during the determination process. Multiple commenters raised the idea that it is difficult to properly diagnose mental illness at all.

Comment: Multiple commenters focused on our classification and diagnosis of mental disorders in general. One commenter asked which mental disorders would be included in the criteria under section 421.110 of our rules. One commenter stated that the term "mental impairment" itself is unclear and asked "[h]ow and who will define this impairment and to what degree will be considered worthy to report? If I have a panic attack is that worthy?" Another wondered if, "[f]or purposes of this rule, anxiety, abnormal sleep/appetite, inflated self-esteem, or decreased energy, combined with alleged difficulty in managing money, are sufficiently disabling to disqualify a person from possessing firearms." Hundreds of commenters asked if Post Traumatic Stress Disorder (PTSD) was an included impairment. Multiple commenters expressed concern that the disorders

NICS NPRM Overview of Comments

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included in section 12.00 of the Listings are too broad, and equate "severe mental issues the same as other issues" such as "eating and anxiety disorders."

### Privacy and Confidentiality

Comment: Several commenters stated that our sending information to the NICS would violate beneficiaries' right to privacy, both generally and with regard to their medical information.

Comment: We received multiple comments from individuals stating that our proposed rules conflicted with the (Health Insurance Portability and Accountability Act of 1996) HIPAA privacy rights or doctor-patient confidentiality.

### Representative Payee Appointment

Comment: We received many comments expressing concern about the manner in which we appoint representative payees. Some comments expressed the belief that we may force the appointment of representative payees for certain beneficiaries who do not require their services. Other commenters conveyed that perceived flaws in the representative payee appointment process would result in the unnecessary appointment of a representative payee and, consequently, unfair inclusion of names in the NICS. Multiple commenters questioned the manner in which we appoint representative payees. One individual questioned the thoroughness of our representative payee evaluation process, while others suggested that we should require direct medical evidence to support the need for a representative payee.

Comment: Several commenters questioned beneficiaries’ ability to remove a representative payee once we appoint one. One commenter asked how we determine if an individual no longer needs a representative payee, and another opined that it is much more difficult to remove a representative payee than it is to obtain one.

Comment: One commenter stated, “Presumably, a current recipient who can manage his/her own financial affairs and is in fact receiving benefits directly (e.g., direct deposit to bank account) would not fall under the above-mentioned phrase, and would retain the right to own, possess, etc., firearms. If this is true, I would recommend making that clearer in the [final] Rule.” Another asked, “If disability benefits under Title II or Title XVI of the Social Security Act are NOT received through a representative payee (i.e., a third party), does the proposed rule to the NIAA still apply?” Many commenters expressed concern that an individual who assigns a representative payee for a temporary period or for convenience would be unfairly reported for inclusion in the NICS. A common scenario described by commenters was that of retired individuals who asked their children to pay their bills during an extended vacation. Another scenario described was that of a mentally capable individual with a physical disability who, due to an inability to write checks or drive, was assigned a representative payee.

### Relief Process

Comment: Multiple commenters asked for specific information about the relief process, including when and at what points in the NICS inclusion decision process a request for relief could be submitted and reviewed, what documentation and evidence would be required to request relief, and who would review the evidence and make relief decisions.

Comment: Commenters suggested that we simplify the relief process for beneficiaries and representatives. Many expressed their disapproval that affected individuals would be required to request that their names be removed from the list and to provide evidence to our satisfaction to be removed from the list. Many highlighted the fact that the burden of proof for non-inclusion would lie with the individual. Other commenters found it problematic that our relief process does not make provision for a formal hearing before an adjudicative authority or allow the examination of witnesses. Several others suggested that we should provide legal counsel to those individuals whom we report to the DOJ.

Comment: Multiple commenters sought clarification about what evidence we would consider when we review a request for relief. One commenter specifically asked about issues relating to documents attesting to a person's character and 5 years of mental health records, such as the availability of these records and who would be required or allowed to provide them. The commenter questioned whether a "clean" criminal record or State background check would qualify as documentation attesting to a person's character. Another commenter questioned the specifics of how we would propose that relief "may" be granted if an individual could establish to our "satisfaction" that the applicant will not be likely to act in a manner dangerous to public safety.

Comment: One commenter questioned how beneficiaries could find out what their specific primary diagnosis was in order to best seek relief from inclusion in the NICS. The commenter also asked about the possibility of disputing the diagnosis, particularly when a secondary diagnosis is also involved in the adjudication of being disabled.

Comment: Several individuals expressed concern over the anticipated length of time for the processing of a request for relief, stating that 30 days was insufficient time to gather and submit all of the required

information, particularly as it involved actions by other government agencies or individuals. One individual expressed concern about the 30-day deadline for the submission of evidence supporting a beneficiary's request for relief in contrast to our 365-day response time. Several other commenters also questioned our ability to respond within the 365-day period, given current delays in the NICS-related relief programs run by other Federal agencies.

Comment: One commenter suggested that we should not report to the DOJ individuals awaiting a response to their petition for relief unless a judge deems it appropriate.

Comment: Multiple commenters asked if we would develop a procedure other than seeking relief to request the removal of individuals' names from the NICS for individuals who no longer meet the criteria that were the cause of their original inclusion in the NICS.

Comment: One commenter stated that, "there is no guarantee that the same prejudices that the rule creates in the first place won't reassert themselves" in the relief process.

### Resources Concerns

Comment: Several commenters expressed that this policy would be an unnecessary waste of the Government's time and resources. One commenter opined that implementing the proposed rules would add to the workload of SSI cases and risk additional backlogs, without any offsetting improvement to public safety.

### Comments in Support of the Rule

Multiple commenters expressed support for the rule. Several individual commenters were in favor of our reporting certain individuals to the NICS database based on their expressed belief that some persons with mental illness should not be allowed to own firearms, because they could pose a danger to themselves or others. Some commenters spoke in their capacity as relatives and representative payees for Social Security beneficiaries with mental illness. One such commenter stated that if “someone does not have enough mental capacity to handle personal finances, he certainly does not have enough mental capacity to have access to guns.” Another commenter opined that medical professionals should support the rules, because clinicians would not want to authorize anyone to possess a firearm for legal liability reasons.

Several advocacy groups also articulated support for the rules. One group supported the rules as written. One group suggested we should expand the criteria used to identify names for inclusion in the NICS, stating that, “One issue not addressed by the proposed rule is the NICS status of future applicants for benefits who are dangerous due to severe mental illness, but who do not have third party representatives who receive payments on their behalf.” This commenter encouraged us to consider ways to expand the rule to include those beneficiaries who pose a danger to themselves or others, regardless of whether their payments are made to a representative payee.

**List of Key Regulations Since June 1, 2016** (NOTE: This list is not exhaustive and does not include extensions or regulations introducing technical changes, including technical changes as a result of the *Bipartisan Budget Act of 2015*.)

**Potentially will be published:** Revisions to Rules Regarding the Evaluation of Medical Evidence. (NOTE: The attached document provides a summary of the rationale for the rule.)

*Summary:* We are proposing several revisions to our medical evidence rules. The proposals include redefining several key terms related to evidence, revising our list of acceptable medical sources (AMS), revising how we consider and articulate our consideration of medical opinions (especially treating source opinions) and prior administrative medical findings, revising who can be a medical consultant (MC) and psychological consultant (PC), revising our rules about treating sources, and reorganizing our evidence regulations for ease of use. These proposed revisions would conform our rules with the requirements of the Bipartisan Budget Act of 2015 (BBA), reflect changes in the national healthcare workforce and in the manner that individuals receive primary medical care, simplify and reorganize our rules to make them easier to understand and apply, allow us to continue to make accurate and consistent decisions, and emphasize the need for objective medical evidence in disability and blindness claims.

This rule has been submitted to the Federal Register for publication (<https://www.reginfo.gov/public/do/eoReviewSearch;jsessionid=247628D397B00768A84B47D68D6BB24E>) with an effective date of March 27, 2017.

*Final Rule,* [Revised Medical Criteria for Evaluating Respiratory System Disorders](#) (Jun. 9, 2016)

*Summary:* We are revising the criteria in the Listing of Impairments that we use to evaluate claims involving respiratory disorders in adults and children under titles II and XVI of the Social Security Act (Act). The revisions reflect our program experience and advances in medical knowledge since we last comprehensively revised this body system in 1993, as well as comments we received from medical experts and the public.

*Final Rule, Revised,* [Medical Criteria for Evaluating Neurological Disorders](#) (Jul. 1, 2016)

*Summary:* We are making final the rule for evaluating neurological disorders that we proposed in an NPRM published in the Federal Register on February 25, 2014 (79 FR 10636). In the preamble to the NPRM, we discussed the revisions to our current rule for the neurological body system and our reasons for proposing those revisions. To the extent that we are adopting the proposed rule as published, we are not repeating that information here; interested readers may refer to the NPRM preamble. We incorporated into the final rule the portions of Social Security Ruling (SSR) 87-6, “Titles II and XVI: The Role of Prescribed Treatment in the Evaluation of Epilepsy” that continue to be relevant to the treatment of epilepsy. As part of the publication of this final rule, we are rescinding SSR 87-6. We also respond to public comments on the NPRM and explain what changes we



are making based on those comments in the “Public Comments on the NPRM” section of the preamble.

*Final Rule*, [Evidence from Excluded Medical Sources of Evidence](#) (Sept. 23, 2016)

**Summary:** In accordance with section 812 of the Bipartisan Budget Act of 2015 (BBA section 812), these rules explain how we will address evidence furnished by medical sources that meet one of BBA section 812’s exclusionary categories (excluded medical sources of evidence) as described below. Under these new rules, we will not consider evidence furnished by an excluded medical source of evidence unless we find good cause to do so. We identify five circumstances in which we may find good cause. In these rules, we also require excluded medical sources of evidence to notify us of their excluded status under section 223(d)(5)(C)(i) of the Social Security Act (Act), as amended, in writing each time they furnish evidence to us that relates to a claim for initial or continuing benefits under titles II or XVI of the Act. These rules will allow us to fulfill obligations that we have under BBA section 812.

*Final Rule*, [Revised Medical Criteria for Evaluating Mental Disorders](#) (Sept 26, 2016)

We are revising the criteria in the Listing of Impairments (listings) that we use to evaluate claims involving mental disorders in adults and children under titles II and XVI of the Social Security Act (Act). The revisions reflect our program experience, advances in medical knowledge, recommendations from a commissioned report, and public comments we received in response to a Notice of Proposed Rulemaking (NPRM).

*Final Rule*, [Unsuccessful Work Attempts and Expedited Reinstatement Eligibility](#) (Oct 17, 2016)

These rules finalize the rules we proposed in our notice of proposed rulemaking (NPRM), published on May 11, 2016. In these rules, we remove some of the requirements for evaluation of an unsuccessful work attempt (UWA) that lasts between 3 and 6 months, allow previously entitled beneficiaries to apply for expedited reinstatement (EXR) in the same month they stop performing substantial gainful activity (SGA), and provide that provisional benefits will begin the month after the request for EXR if the beneficiary stops performing SGA in the month of the EXR request. These changes will simplify our policies and make them easier for the public to understand.

*Final Rule*: [Revised Medical Criteria for Evaluating Human Immunodeficiency Virus \(HIV\) Infection and for Evaluating Functional Limitations in Immune System Disorders](#) (Dec. 2, 2016)

**Summary:** We are revising the criteria in the Listing of Impairments (listings) that we use to evaluate claims involving human immunodeficiency virus (HIV) infection in adults and children under titles II and XVI of the Social Security Act (Act). We also are revising the introductory text of the listings that we use to evaluate functional limitations resulting from immune system disorders. The revisions reflect our program experience, advances in medical knowledge, our adjudicative experience, recommendations from a commissioned report, and comments from medical experts and the public.

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Final Rule, [Ensuring Program Uniformity at the Hearing and Appeals Council Levels of the Administrative Review Process](#) (Dec 16, 2016)

*Summary:* We are revising our rules so that more of our procedures at the hearing and Appeals Council levels of our administrative review process are consistent nationwide. We anticipate that these nationally consistent procedures will enable us to administer our disability programs more efficiently and better serve the public.

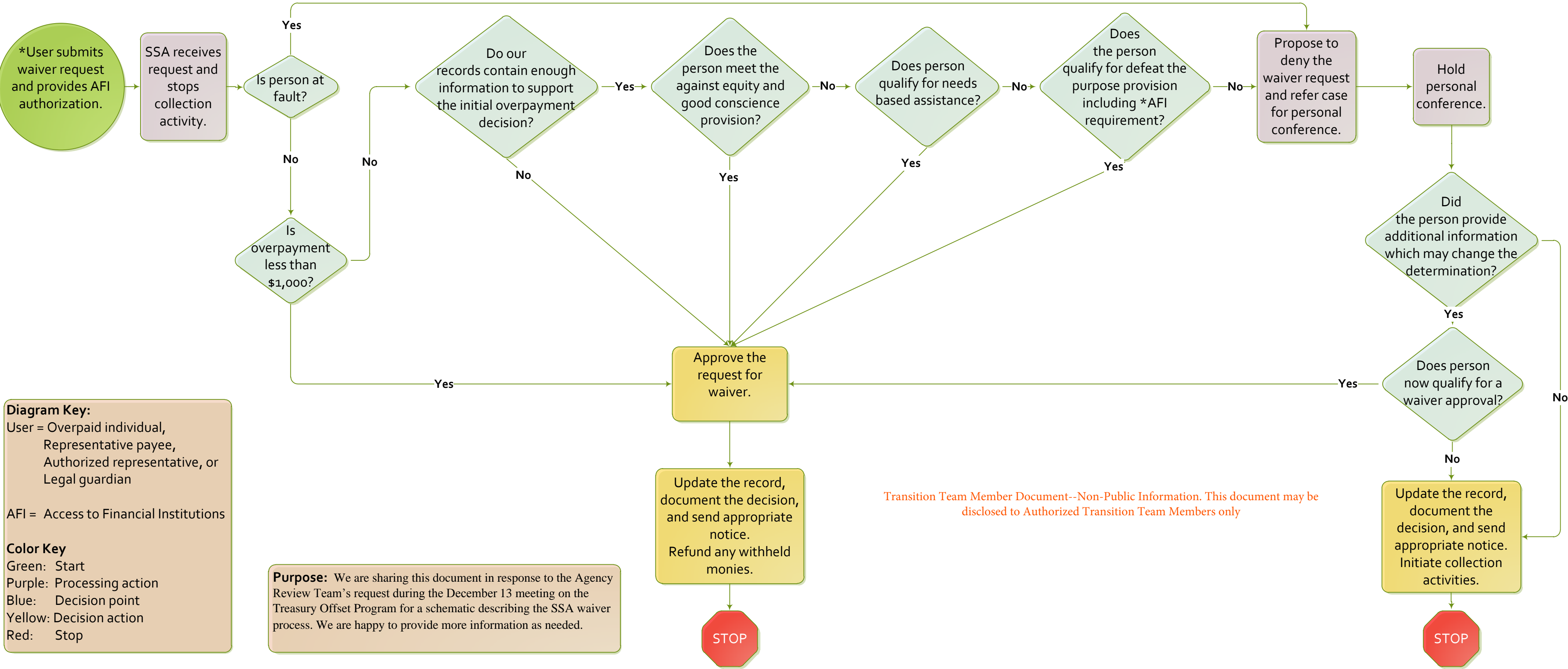
We are revising and making final the rules for creating nationally uniform hearing and Appeals Council procedures, which we proposed in a notice of proposed rulemaking (NPRM) published in the Federal Register on July 12, 2016 (81 FR 45079). In the preamble to the NPRM, we discussed the changes we proposed from our current rules and our reasons for proposing those changes. In the NPRM, we proposed revisions to:

- (1) The time frame for notifying claimants of a hearing date.
- (2) The information in our hearing notices.
- (3) The period when we require claimants to inform us about or submit written evidence, written statements, objections to the issues, and subpoena requests.
- (4) What constitutes the official record.
- (5) The manner in which the Appeals Council would consider additional evidence.

Final Rule: [Implementation of the NICS Improvement Amendments Act of 2007](#) (publication date: Dec 19, 2016)

*Summary:* These final rules implement provisions of the NICS Improvement Amendments Act of 2007 (NIAA) that require Federal agencies to provide relevant records to the Attorney General for inclusion in the National Instant Criminal Background Check System (NICS). Under these final rules, we will identify, on a prospective basis, individuals who receive Disability Insurance benefits under title II of the Social Security Act (Act) or Supplemental Security Income (SSI) payments under title XVI of the Act and who also meet certain other criteria, including an award of benefits based on a finding that the individual's mental impairment meets or medically equals the requirements of section 12.00 of the Listing of Impairments (Listings) and receipt of benefits through a representative payee. We will provide pertinent information about these individuals to the Attorney General on not less than a quarterly basis. As required by the NIAA, at the commencement of the adjudication process we will also notify individuals, both orally and in writing, of their possible Federal prohibition on possessing or receiving firearms, the consequences of such prohibition, the criminal penalties for violating the Gun Control Act, and the availability of relief from the prohibition on the receipt or possession of firearms imposed by Federal law. Finally, we also establish a program that permits individuals to request relief from the Federal firearms prohibitions based on our adjudication. These changes will allow us to fulfill responsibilities that we have under the NIAA.

# Overpayment Waiver Process



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# FY 2017 WORK PLAN

## OFFICE OF RETIREMENT AND DISABILITY POLICY (ORDP)

*ORDP is essential to the successful completion of the agency's Critical Priorities and implementation of Vision 2025. This work plan outlines ORDP's priorities for fiscal year (FY) 2017, in support of the agency's goals, Critical Priorities, and Vision 2025.*

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# ORDP FY 2017 WORK PLAN

## MESSAGE FROM THE DEPUTY COMMISSIONER

Since its founding in 1935, Social Security has provided a bulwark of economic security for American workers and their families. For more than 80 years, these earned benefits have helped secure millions of people throughout life's journey. In addition to providing the foundation of retirement security for almost all American workers and families, Social Security is one of the most effective poverty-prevention programs in the nation, and the largest federal benefit program for children.

Few government agencies today touch as many lives as the Social Security Administration (SSA). Our stated mission is to “deliver Social Security services that meet the changing needs of the public.” Much of the agency's job is to get the checks to all 66 million Social Security and Supplemental Security Income (SSI) beneficiaries – the right amount, to the right person, at the right time. That takes an incredible amount of consistency and focus across the agency, and we do it every month of every year.

While our front line employees who work directly with the public are the face of Social Security, ORDP's policy and research work provides the backbone for this mission. ORDP draws the connections between program operations and the beneficiaries we serve – because our policies determine *how* we operate, and our research builds understanding about *why* we do so, by examining the effects of our programs.

I encourage us all to take the time to focus on our shared mission and shared values, and the impacts we are making every day in the lives of millions of individuals. I have found that focusing and reflecting on *why* we do what we do helps bring us together as an agency and strengthen our commitment to public service.

This work plan continues that focus by aligning ORDP's FY 2017 priorities with the agency's long-term plan, Vision 2025. By improving and streamlining policies, using research to further our understanding of the policies and programs, and engaging every one of our employees, we will advance the agency's mission in countless ways.

## ORDP FY 2017 WORK PLAN

Some of you may remember Ida Merriam, who was the head of the Office of Research and Statistics for many years – and my original mentor at SSA. At the 50<sup>th</sup> anniversary of Social Security, Ida wrote that “in a changing world,” research (and here I would add policy, too) “could help point the way toward the unchanging goal of economic security for all first laid out in the Social Security Act of 1935.” Her words still apply today. As the needs of the public for Social Security programs continue changing over time, ORDP’s work will continue to hold the utmost value for our agency. Thank you for all that you do to make the original vision of Social Security’s value a reality for millions of people.

Virginia Reno  
Deputy Commissioner

# ORDP FY 2017 WORK PLAN

## INTRODUCTION TO THE FY 2017 ORDP WORK PLAN

Although all ORDP staff are supporting critical efforts necessary to accomplish ORDP's goals, resource constraints require that we focus on a select number of objectives that will have the greatest impact on our ability to advance our vision and mission. These objectives are the ORDP priorities for FY 2017. It is important to recognize that all ORDP employees are supporting these priorities, whether directly or by providing the support critical to the operational of the organization.

## CONTEXT OF THE ORDP WORK PLAN WITHIN SSA

In October, the Office of the Chief Strategic Officer unveiled the [Agency's Critical Priorities](#) for FY 2017. As in the previous year, these Critical Priorities fall into three areas:

1. **Superior Customer Experience;**
2. **Exceptional Employees;** and,
3. **Innovative Organization.**

ORDP has established eight priorities for FY 2017. Each of ORDP's eight FY 2017 priorities aligns with these three Agency Critical Priority areas, and is color-coded to illustrate the linkages.

## HOW TO USE THIS DOCUMENT

The intent of this document is to assist ORDP staff in connecting the Agency's strategic plan and long-term vision to the ORDP priorities, and ultimately, to their own efforts. The ORDP work plan sets guideposts for what ORDP intends to achieve by identifying priorities and the general strategies through which we will achieve these objectives. Associate Commissioner (AC) level component are utilizing this document to develop component-level work plans that further develop the strategies outlined here, including specific activities and milestones for achieving each of these strategies. ORDP staff should refer to their AC level work plans to incorporate those activities into their own annual work plans.



### OFFICE OF RETIREMENT AND DISABILITY POLICY - VISION, MISSION AND VALUES

#### **VISION**

To create evidence-based programs and policies that enable and support people through their life's journey.

#### **MISSION**

Develop, promote, and use research and data to improve programs and policies and to enable accurate, consistent, and timely Social Security determinations.



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## VALUES

Inclusive and engaging research and policy development will leverage the experiences and views of our own employees as well as stakeholders outside the agency, to ensure thorough and thoughtful consideration of all options and implications.

Evidence based and data driven approaches will guide our research and policy development, to ensure that we are basing decisions and proposals on the most current evidence.

Innovative research and policy development will question the status quo and look for ways to simplify, automate and improve our policies by exploring new ideas and opportunities.

Customer centric approaches to policy development and service delivery will ensure that we consider the impact of our policies and programs on the public, including vulnerable populations.

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## ORDP - FISCAL YEAR 2017 PRIORITIES



**Superior Customer Service**



**Exceptional Employees**



**Innovative Organization**

### **1. Engage, Empower, and Develop our Employees**

Cultivate an organizational environment that attracts, retains, and motivates exceptional employees.

### **2. Create Effective, Efficient, and Innovative Policy**

Pursue innovative, evidence based, data driven ideas to help us administer our programs more efficiently and effectively for our customers.

### **3. Keep the Disability Program Aligned with Contemporary Medicine, Healthcare Systems, Technology, and Workplace Requirements**

Develop and maintain evidence-based policies that reflect present-day views of disability, medical care advancements, healthcare delivery models and changes in workplace requirements.

### **4. Be a Leader in Social Insurance Discussions and Activities around the World**

Collaborate with international organizations to produce comparative research on social security systems throughout the world and strengthen international programs and policies.

### **5. Inform Public Policy Through Research**

Provide high-quality public policy research to help shape the future of our programs and provide support to Congress and other external stakeholders and policymakers.

### **6. Support the Employment Needs of our Customers**

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Strengthen return to work policies and programs and conduct demonstrations to help policymakers shape employment support programs and policies in the future.

## **7. Transform Data Sharing for Better Public Service**

Build relationships with federal and state agencies and find new ways to improve the administration of government programs by sharing data in a secure manner.

## **8. Enhance Payment Accuracy and Quality for Our Customers**

Create and implement strategies to improve payment accuracy and quality by addressing the root causes of improper payments and inconsistent procedural outcomes.

## ORDP - FISCAL YEAR 2017 OBJECTIVES

### 1. Engage, Empower, and Develop our Employees

*We continue to cultivate an organizational environment that attracts, retains, and motivates employees.*

- a. Assess training and development needs and create opportunities for growth by supporting within and cross-component developmental assignments and detail opportunities.
- b. Recruit and hire the right people for the right job, and support flexibility in movement across components as needed to ensure the right fit and component needs.
- c. Increase employee satisfaction and work-life balance by continuing to expand telework throughout ORDP while maintaining high quality work.
- d. Support engagement and superior performance by effectively delegating, empowering, and holding one another accountable by addressing performance, including non-performers, exceptional performers, and those who consistently do their job well.
- e. Strengthen collaboration by fostering open communication, transparency, real time feedback, and idea sharing.
- f. Continuously improve our efficiency by refining our internal processes and organizational structure.

### 2. Create Effective, Efficient, and Innovative Policy

*We pursue innovative, evidence-based, data-driven ideas to help us administer our programs more efficiently and effectively for our customers.*

- a. Develop new and modified policies based on data, quantitative and qualitative research, evaluation of program effectiveness, and distributional analysis of policy options.

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- b. Simplify and improve the SSI program.
- c. Implement legislative changes in the least complex manner possible (e.g., the Achieving a Better Life Experience (ABLE) Act and certain provisions of the Bipartisan Budget Act of 2015).
- d. Develop policy that supports the agency's eServices initiatives (e.g., Internet Social Security Number Replacement Cards Policy and iSSI).
- e. Improve the clarity and usefulness of notices for our beneficiaries.
- f. Strengthen the representative payee program (e.g., implement the new process for monitoring representative payees in a more robust and targeted way).
- g. Deliver clear policy guidance to staff nationwide via a stable and modern 21st Century PolicyNet.
- h. Enhance appointed representative program policies, training, and online systems (e.g., continuing education training courses and representative payment structure).
- i. Identify medical improvement at the earliest opportunity (e.g., evaluate and implement Continuing Disability Review program policy/training on establishing diaries).

### **3. Keep the Disability Program Aligned with Contemporary Medicine, Healthcare Systems, Technology, and Workplace Requirements**

*We continually evaluate policies and procedures, and propose changes to reflect current medical care/technology, and changes in workplace requirements.*

- a. Ensure medical criteria in our listings are up to date on a 3–5 year cycle.
- b. Ensure vocational program policy reflects current workplace requirements as shown in the Bureau of Labor Statistics Occupational Requirements Survey.
- c. Streamline and automate disability business process and guide decision-making (e.g. Health Information Technology and enhanced decision support tools and integration of the electronic Claims Analysis Tool into the Disability Case Processing System).

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- d. Ensure policy decisions are informed by evidence (e.g., conduct medical research activities prior to policy development on topics such as assistive technology, function and hospitalization alternatives, management information and data analytics, and case reviews and Request for Program Consultation).
- e. Increase consistent application of disability policy across adjudicative components and levels (e.g., using state-of-the-art practices and developing case based training).
- f. Ensure policy is realistic and responsive to changes in the environment by seeking input from stakeholders and from the advocacy community (e.g. the National Disability Forum).

#### **4. Be a Leader in Social Insurance Discussions and Activities around the World**

*We collaborate with international organizations to produce comparative research on social security systems throughout the world, and strengthen international programs and policies.*

- a. Explore and solve common challenges in social insurance (e.g., represent our agency and our country at meetings of international social security organizations, and collaborate with other nations).
- b. Inform policy makers and contribute to the dialogue among nations (e.g., conduct research and comparative studies on international issues).
- c. Simplify policy and create efficiencies for U.S. beneficiaries living abroad as well as foreign beneficiaries living in the U.S. (e.g., pursue negotiations of international totalization agreements with foreign governments, ensure that current agreements keep pace with changing laws around the world, and engage in dialogue with our foreign benefit offices).
- d. Provide leadership for the development of Social Security programs through technical assistance.
- e. Engage in a joint venture of training activities with international organizations such as the Inter-American Conference on Social Security.

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## 5. Inform Public Policy Through Research

*We produce high-quality public policy research to help inform the public about our programs and provide evidence to facilitate policy-making.*

- a. Create a robust intramural and extramural research agenda that articulates the research performed by our employees and grantees and that is responsive to key social insurance issues of interest to policymakers and the public.
- b. Maintain and enhance capabilities for modeling Social Security policy reforms
- c. Use and disseminate research findings to strengthen public understanding of Social Security programs and develop policy relevant options for stakeholders (e.g., explore and build upon communication strategies such as the brochure developed for transition-age youth).
- d. Use grants and other mechanisms to partner with third-party experts and others to support research and evaluate social insurance topics, train scholars and practitioners in Social Security programs and disseminate findings to the public, (i.e., the Disability and Retirement Research Consortia and the Analyzing Relationships between Disability, Rehabilitation, and Work program).
- e. Work with federal partners to conduct research and develop data resources to improve policies and processes (e.g. Institute of Medicine (IOM) and National Institutes of Health (NIH) and the Bureau of Labor Statistics (BLS), White House Social and Behavioral Sciences Team, etc.).

## 6. Support the Employment Needs of our Customers

*We strengthen return to work policies and programs and conduct demonstrations to help policymakers shape employment support programs and policies in the future.*

- a. Ensure quality service to our beneficiaries and timely and accurate Vocational Rehabilitation (VR) payments to the state VR agencies (e.g., timely and accurate information from the Work Incentives Planning and Assistance (WIPA) and the Protection and Advocacy of Beneficiaries of Social Security (PABSS) programs, enhance collaboration with SSA Regional Offices and field components to promote communication and awareness of return to work services and work incentives; etc.).

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- b. Strengthen communication, oversight and performance of Employment Networks (e.g. continue site visits and quality review audits).
- c. Enhance the administration and effectiveness of the Ticket to Work Program (e.g., continuously solicit stakeholder input, pursue regulatory action changes, and leverage Information Technology to strengthen the Program).
- d. Leverage technology to ensure timely and accurate payments for return-to-work service providers and to prevent overpayments to beneficiaries (e.g., improve automation around the VR program, utilize Continuing Disability Review Enforcement Operation (CDREO)/WorkSmart, implement wage reporting Proof of Concept and gain direct access to beneficiary earnings to minimize the need for wage reporting by the beneficiary).
- e. Test and benchmark policies and program rules to encourage employment and self-sufficiency (e.g., develop, implement and/or evaluate experimental designs such as the Promoting Opportunities Demonstration (POD), the Early Intervention Mental Health Demonstration, and the Promoting Readiness of Minors in Supplemental Security Income (PROMISE) demonstration).
- f. Use research and outreach to identify the needs of return to work customers and identify alternatives to existing programs and policies (e.g. surveys).

### **7. Enhance Data Sharing for Better Public Service**

*We ensure that agency data exchange services align with agency priorities*

- a. Identify with SSA business sponsors opportunities where data could support policy analysis and improve SSA program implementation and stewardship (e.g., state non-covered pension data from states or the Internal Revenue Service Arrival and Departure Information System).
- b. Improve the efficiency and effectiveness of SSA and other government programs (e.g., lead the Federal Data Exchange Community of Practice, continue to build relationships with federal and state agencies and find new ways to share data in a secure manner (e.g., Centers for Medicare & Medicaid Services Hub)).



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- c. Enhance the effectiveness and transparency of SSA data sharing policy (e.g., develop, streamline, and document policy).
- d. Foster data availability and sharing within and across ORDP components (e.g., inventory of available data).

### **8. Enhance Quality and Payment Accuracy for Our Customers**

*We create and implement strategies to improve quality and payment accuracy by addressing the root causes of improper payment and inconsistent procedural outcomes*

- a. Ensure ongoing alignment between root causes and improper payment prevention strategies (e.g., make use of quality and stewardship findings).
- b. Target key areas for improving payment accuracy (e.g., co-lead the Agency Critical Priority, “Enhance Quality and Payment Accuracy for our Customers,”; pursue corrective action and remediation plans, including legislation, policy, training, systems and business process changes that may be required to correct and prevent errors).
- c. Foster collaboration with internal and external partners, and share challenges and strategies for reducing improper payments (e.g., lead the Federal Improper Payments Community of Practice, lead the Improper Payments Oversight Board).

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## ORDP AT A GLANCE

ORDP supports the agency's vision to "proudly serve Social Security customers throughout their lifetime, when and where they need us." Social Security is our nation's most effective poverty prevention program. We are also one of the largest government programs in the world, disbursing almost \$1 trillion dollars in federal benefits per year – with a consistently high accuracy rate and with an administrative cost of only 1.3%.

ORDP plays a critical role in creating evidence-based policy, research and demonstrations to inform and shape our programs. ORDP is comprised of seven Associate Commissioner level components with a diverse and complementary set of functions as follows, and described in more detail on our intranet site:

- **Office of Data Exchange and Policy Publications (ODEPP):** ODEPP provides agency-wide oversight of more than 3,000 data sharing agreements. They also work across government to identify trends and opportunities in data sharing and to leverage data to improve program administration. ODEPP also manages the agency's policy publication systems and processes, as well as all Information Technology support for ORDP.
- **Office of Disability Policy (ODP):** ODP shapes medical and vocational disability policy to keep pace with changes in medicine, technology and the world of work. They also develop solutions to improve the disability application process, support the use of data and evidence to drive decision-making, and develop standards and protocols to exchange health related information with the public and private sectors.
- **Office of Income Security Programs (OISP):** OISP shapes, simplifies, implements and advances a wide array of program policies, including on retirement, SSI, Medicare enrollment, Social Security cards, earnings, agency notices and representative payees. They also coordinate payment accuracy strategies and activities for the agency.
- **Office of International Programs (OIP):** OIP creates and manages a network of bilateral ("totalization") Social Security agreements that coordinate the U.S. Social Security program with the comparable programs of other countries. They also

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collaborate with international organizations on research, comparative studies and technical assistance to inform social insurance programs throughout the world.

- **Office of Research, Demonstration, and Employment Support (ORDES):** ORDES conducts large-scale demonstrations to test and evaluate potential policy changes. In addition, ORDES manages the agency's employment support programs and policies, including the Ticket to Work. ORDES also produces data, research, and statistical models to inform the agency's disability policy.
- **Office of Research, Evaluation & Statistics (ORES):** ORES conducts research on Social Security programs, including demographic and economic trends that affect our programs and beneficiaries. ORES also leverages the expertise of researchers around the country through the administration of grant programs. ORES is a designated federal statistical office that produces statistical publications on Social Security programs and supports the development of data for research purposes.
- **Office of Retirement Policy (ORP):** ORP conducts policy research on retirement security, including using microsimulation models to project the impact of policy changes on our beneficiaries and other demographic groups. ORP also leverages research findings to help the public make informed choices about planning for retirement, such as when to claim benefits.

**Office of Quality Review (OQR)**  
**Prepared by DCBFQM**  
**December 8, 2016**

**What We Do**

- Evaluate and report on the integrity and quality of the administration of Social Security programs.
- Conduct broad-based reviews, studies, and analyses of agency operations with emphasis on compliance with laws, regulations, policies; prevention of program and systems abuse; elimination of waste; and the increase of efficiency.
- Establish quality review policy for our field reviewers; analyze and report on results; and recommend changes in programs, policies, or legislation aimed at quality and productivity improvement and program simplification.
- Perform customer surveys that measure the public's perceptions of the agency's service delivery and provide insights for agency planning.
- Lead the development and maintenance of the quality assurance systems that support nationwide studies and reviews.
- Conduct evaluations of the agency's 800 number and field office telephone service to assess the quality of service provided to the public based on adherence to policy and procedures.

**FY 2016 ACCOMPLISHMENTS**

**Reviews and Surveys**

Conducted 501,360 quality reviews, surveys, and studies and provided direct feedback to agency partners.

**Mandatory**

Type	Total Cases	Scope and Impact
PER: Title II/Title XVI	348,399	Reviews 50 percent of all favorable determinations before benefits are paid. Uses a predictive model to select the most error-prone cases. Identifies issues in case documentation or decisional accuracy. Authority: Public Law 96-265, enacted in 1980, (section 221 (c) of the Social Security Act for Title II and Public Law 109-171, enacted February 2006, (section 1633(e)(1) of the Act) for Title XVI.
QA Initial/CDRs	57,298	Completes initial and CDR reviews for performance accuracy. Provides customer accuracy feedback and trend analysis. Authority: 20 CFR 404.1640 – 404.1670 (QA Initial) and PL 96-265 (CDR)
SSI Stewardship	4,428	Provides an accuracy measurement of Title XVI payments to individuals who received at least one SSI payment during the fiscal year. Authority: Improper Payments Elimination and Reduction Act
Medicare Part D	2,544	Redetermines eligibility on a random sample of cases for quality assurance purposes. By determining if the subsidy determination was correct, we try to pinpoint possible areas for accuracy improvement. Authority: 20 CFR 418.3125 (b)(5)
OASDI Stewardship	1,768	Reviews for overpayment accuracy and underpayment accuracy. Provides accuracy measurement of payments to beneficiaries currently on the rolls and the basis for reports to monitoring authorities as well as the reporting requirements. Authority: Improper Payments Information Act of 2002.

**Priority**

Type	Total Cases	Scope and Impact
Targeted Denial Review	42,466	Selects error-prone DDS initial and reconsideration denials from each State based on a predictive model. Ensures the agency is not denying or delaying benefits to people rightfully entitled and reduces potential hearings.
Retirement Applicant Survey	6,659	Surveys customers who had recently filed for retirement to determine their level of satisfaction with the retirement application process. Provides feedback to help improve the service for future customers.
PC Inline Review	4,802	Improves accuracy in processing alerts, exceptions, and processing limitations. Prevents improper payments. Provides customer accuracy feedback and trend analysis.
Disability Initial Claims Report Card Survey	3,409	Surveys customers who had recently filed an initial disability claim to determine their level of satisfaction with the disability claims process. Provides feedback to help improve the service for future customers.
AFI Study	3,692	Determined that it would not be cost-effective to conduct AFI verification in-between redeterminations or to lower the current \$400 liquid resource tolerance.
FO/HO Office Visitor Survey	1,967	Surveys customers who had recently visited an FO or HO to conduct business with the agency to determine their level of satisfaction with the office visit.
PC Overpayment Review	1,589	Completed EIB CESS reviews and EPE reviews from PC-7. Improves overpayment processing.
800 Number Caller Survey	1,408	Surveys customers who had recently called the National 800 Number to conduct business with the agency to determine their level of satisfaction with the phone call. Provides feedback to help improve the service for future customers.
FO Caller Survey	1,185	Surveys customers who had recently called an FO to conduct business with the agency to determine their level of satisfaction with the phone call.
Social Security Card Center Survey	1,003	Surveys customers who had recently visited a card center to conduct SSN related business with the agency to determine their level of satisfaction with the SSN application process.
Force Pay/M01	23	System enhancement made to M01 process. Mitigates a significant deficiency. Peer review to ensure that FOs processed and

		correctly documented M01 transactions requiring a payment change.
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## Customer Requests

Type	Total Cases	Scope and Impact
QA Recon	7,976	Provides customer accuracy feedback and trend analysis
Disability Hearing Officer (DHO) Review	2,612	Provides customer accuracy feedback. Hearing Officers may continue cases previously ceased. Prevents cases from moving to appeal.
Workload Support Unit (WSU)	2,200	Determines the quality and accuracy of WSU processing of claims.
Administrative Law Judge (ALJ) Reversal Study	400	Reviews cases that were denied by DDS and later allowed by ODAR. Verifies conditions where a case was policy compliant at the initial decision and appropriately allowed later.
Title II Claimant Representative Fee Review	400	Determines if proper procedures were followed in the representative fee payment process and in the withholding of past-due benefits. Determines case-dollar accuracy rate.
Special Fraud Review	200	Fraud reviews for multiple fraud situations. Provides customer accuracy feedback.
Third Party Death Information Analysis	200	Determined third-party databases are not an effective means to determine death in cases where the beneficiary is in suspense. Determined the cost-effectiveness of using third-party databases for dates of death and contact information for beneficiaries who may have died, when that information is not in agency records.
ALJ Bench Decisions Probe	100	Provides feedback on bench decision accuracy versus standard decision accuracy, and adherence to bench decision procedures.

## Reports Published for One-Time Reviews, Surveys, or Studies

Published nine reports to address audit recommendations, conduct in-depth analysis into areas with political sensitivity, or provide additional quality probes of areas previously identified as error-prone:

- Third Party Death Information Analysis
- Title II Claimant Representative Fee Review
- Government Pension Offset
- SSI Internet Use
- Administrative Law Judge Bench Decisions Probe
- Title XVI Living Arrangement B
- Title XVI Post-Entitlement Nonmedical Appeals
- Error Exceptions to the Medical Improvement Review
- Post-Windsor, Pre-Obergefell Title XVI Same-Sex Marriage Determinations

## Reports Published for Ongoing Reviews, Surveys, or Studies

Published 15 reports to provide customer accuracy feedback and trend analysis, reduce errors, reduce potential hearings, and pay claimants correctly:

- Online Authentication
- Overall Service Satisfaction - Telephone and In-Person Service
- Office Visitor Survey: Field and Hearing Office Analysis
- Prospective Client Survey
- Telephone Service Evaluation—800 Number Call Monitoring
- Telephone Service Evaluation—Field Office Call Monitoring
- Title XVI Payment Accuracy Report
- Title XVI Transaction Accuracy Review
- Senior Attorney Advisor National Screening Unit Study
- Disability Case Review - Administrative Law Judge Hearing Decisions
- Enumeration Accuracy
- Medicare Low Income Subsidy Awards Review
- Medicare Part D Low Income Subsidy Redetermination Review
- Title II Payment Accuracy
- Title II Post-Entitlement Field Office Transactions

## Report Recommendations

Developed a Recommendation Tracking System (RTS) to monitor the progress made in implementing our report recommendations. Recommended 27 corrective actions and collaborated with stakeholder components to develop corrective action plans.

## Assistance to the Office of Disability Review and Adjudication (ODAR)

Assisted with Compassionate and Responsive Service (CARES)-related workload processing tasks to enable

ODAR to redirect its resources to focus on reducing pending cases. Completed actions on 16,846 cases for ODAR. Suspended some of our own discretionary work to complete these tasks.

***Quality Visits and Collaborations (QVC)***

Provided tailored analysis, reviews, training, and collaborative assistance to agency components in key areas to drive quality improvement and service objectives. Completed 141 QVCs, 72 percent conducted face-to-face and 28 percent virtually, in the agency's 10 regions and headquarters.

## **DCO (Non-Headquarters) Components and Facilities**

### **Regional Offices (RO)**

The Office of the Regional Commissioner (ORC) serves as the principal SSA component in each of SSA's ten regions. Each ORC ensures effective SSA interaction with other Federal and local government agencies, State welfare agencies, State Disability Determination Services (DDS) and regional and local organizations. The ORC also issues supplementary operating policies and procedures for SSA's programs that target their specific regional needs. The ORC directs a region-wide network of Area Director Offices (ADO), Field Offices (FO), teleservice centers (TSC) and, in each of the six regions where present, a Program Service Center (PSC). It provides overall management direction for the provision of personnel services and administrative support to SSA regional components and implements a regional SSA public affairs program.

### **Area Director's Offices (ADO)**

Area Directors ensure FO managers are carrying out their assigned responsibilities fully and effectively and provide support for sensitive issues. The office ensures sound working relationships are established and maintained between field offices and many entities, such as DDSs, large employers, unions, medical associations and organizations, Federal, State, and local agencies, and major information media. The ADO facilitates the administration of programs to obtain the advantages of coordinated, area-wide effort in such fields as public affairs, community relations, recruiting, training, career development, equal opportunity and parallel functions. There are 51 Area Offices throughout the nation.

### **Field Offices (FO) – Primary Customer: Walk-in Visitors**

Field offices are geographically located to provide citizen's access to in-person, face-to-face Social Security services. Technicians in each SSA FO are trained to handle the wide scope of SSA responsibilities. These may include: providing general information on all the programs SSA administers; providing speakers for informational events; serving those who wish to file for retirement, survivor, disability, or Medicare benefits; providing assistance to resolve issues involving address or bank changes, lost checks, and applying for or replacing Social Security number cards. The FO also offers citizens the opportunity to complete business via local telephone service, Video Service Delivery for transacting business with other SSA entities and ability to use a Self-Help computer to complete SSA business. There are approximately 1200 FOs throughout the nation.

**Card Centers – Primary Customer: Walk-in Visitors**

Card centers are unique SSA FOs designed for one exclusive purpose – receive and process applications for Social Security numbers (i.e., Enumeration) and replacement cards. Card centers are located in metropolitan areas with high volume demand for Social Security card processing requests. We have 14 card centers in the following areas: several cities in California and New York; Phoenix, AZ; Orlando, FL; Minneapolis, MN; Las Vegas, NV; and Philadelphia, PA.

**Workload Support Units (WSU) – Primary Customer – Internet User**

Since the inception of iClaim (filing a claim online) in 2000, we have seen the public's service channel preferences continue to evolve to include online service as the faster and more convenient service channel. In support of that shift and expectations that trend will continue, our Workload Support Units (WSU) process work generated through the internet – just as a field office, but virtually – and perform other work that does not require face-to-face contact, increasing customer convenience and reducing FO traffic. We have 16 WSUs nationally.

**Teleservice Center (TSC) Primary Customer – Callers**

The Teleservice Center (TSC) is the primary public contact point for most persons who call SSA via the nationwide "800" telephone number (1-800-SSA-1213). Telephone technicians assist the public when they call our 800 number to obtain information, schedule appointments, or resolve issues with benefits. These employees assist the public by answering a wide variety of questions, conducting interviews, investigating situations, and resolving problems.

TSCs are national network, linked together on SSA's 800 number network, and calls are routed to different locations at different times of the day, or different days of the week, depending on call volumes and available resources. SSA's 800 number network is a very complex and sophisticated system and handles millions of calls every year. There are 26 TSCs located throughout the United States and in Puerto Rico.

**Processing Center Operations (PCO)**

Processing Center Operations (PCO) is comprised of eight organizations: six Program Service Centers (PSC), the Office of Disability Operations (ODO) and the Office of Earnings and International Operations (OEIO). PCO is a centralized organization with a complex structure and mission that touches a wide-range of service objectives. Multiple organizational components, comprised of well over a hundred positions, process the most complex workloads in the Agency for



approximately 11-12% of SSA beneficiaries, including claims, appeals, attorney fee payments, debt collection, evaluation of medical/vocational evidence, records maintenance, continuing eligibility, inquiries, remittance and accounting functions. In addition, PCO provides support to callers contacting the National 800 Number and for the Agency's online and electronic services.

### **Office of Central Operations (OCO)**

In addition to serving as the lead component for OCO and OEIO, subcomponents within the OCO organization maintain records of workers' earnings, furnish earnings statements, resolve individual and employer earnings problems, service domestic claims, and handle foreign claims around the globe.

Other components within the jurisdiction of OEIO include the Foreign Benefit Units (FBU). The different laws, customs, languages and conditions abroad, together with the difficulties that can arise in dealing with claimants and beneficiaries abroad by mail, often make it difficult to administer the Social Security program effectively outside the U.S. SSA customers who live outside the United States are serviced by Department of State (DOS) personnel located in US Embassies, Consulate Generals and Consulates.

OEIO utilizes these Foreign Service Posts (FSP) to assist with our business, including taking and developing claims. FSP employees are nationals of the host country and are called Foreign Service Nationals (FSN). FSN positions function like standard SSA Field Office (FO) service, claims and field representatives. OIO can structure requests for assistance to these FSPs in the same way as a developmental request to any SSA FO. However, because the FSNs do not have SSA adjudicative authority, they must send completed claims packages to OIO for review and final adjudicative action.

### **State DDS (DDS)**

The State Disability Determination Services (DDS) are responsible for the development and evaluation of medical and vocational documentation for Social Security and Supplemental Security Income claims, leading to a determination of whether or not an individual is disabled. These determinations may include consideration of the individual's age, education, and past work experience. Determinations involving vocational factors consider the availability of jobs in the national economy. The DDS is 100% federally funded by the Social Security Administration.

The overall objective of the DDS is to provide accurate, timely, and cost-effective disability determinations in accordance with Title II and Title XVI of the Social Security Act to disabled citizens while facing challenges that include attrition and periods of limited or no hiring authority.

## OPERATIONS DECISION MAKING PROCESS

The decision making process within Operations is based upon organizational hierarchy, with the decision-making responsibility delegated according to lead areas and the sensitivity or significance of the decision.

Associate Commissioners (AC) have established lead areas according to component responsibility. Regional Commissioners (RC) also have established lead areas. In addition, each DCOSS AC collaborates with an RC in certain topic areas. For example, the Boston RC has the executive lead for disability and partners with the ACs of the Office of Public Service and Operations Support and the Office of Disability Determinations. Together, the RC and two ACs take the national lead on disability related projects and initiatives.

Within Operations, there are quarterly DCO executive meetings that include the DC, ADCs, ACs, and RCs. The executives use these meetings to discuss long-term planning, strategic initiatives, and current topics of importance. In addition, this group of executives has a weekly touch point call to discuss hot topics in between the larger quarterly meetings.

Decisions solely under DCO purview are made within individual regions, individual components, or in collaboration with other RCs/ACs with approval or concurrence from the Assistant Deputy Commissioner (ADC) or the Deputy Commissioner for Operations (DCO). Decisions or proposals are developed at staff level and reviewed by management prior to escalating through higher management levels for final approval. Under the shared services model, regions coordinate responsibilities to reduce redundancies. For example, the Chicago region is responsible for human resources for the Denver region.

Decisions that extend into other non-Operations components' areas are similarly developed at staff level prior to internal approval at higher management levels. Once DCO internal leadership agrees with the recommendation, the issue is taken before the executives of the other affected component for consensus. The decision is taken before ACs, ADCs, or DCs depending upon the significance of the decision point.

Budget decisions are typically made at the DC level, with execution at the AC and RC level. Decisions on staffing allocations are made at the DC level. Specific hiring decisions are made according to grade of hire with lower graded hiring decisions made by component Division Directors (DD). GS-14 decisions are made by AC based upon recommendation from the DD. GS-15 decisions are made by ADC or DC with recommendations from AC.

## **Office Consolidation**

### **Consolidation Determining Factors**

Factors to consider in the consolidation decision process:

- Demographics of service area
- Impact on the public
- Geography of service area
- Staffing
- Impact on stakeholders
- Socio-economic conditions
- Proximity of other offices
- Impact on employees\*
- Lease expirations

### **Communication Plan – Responsible Components**

The Office of Operations, the Office of Communications, and the Office of Legislative and Congressional Affairs are responsible for the coordination and timely communication of office consolidations.

### **Pre-Process Activities**

The pre-process consists of the following activities:

1. Identify stakeholders and community leaders
2. Develop and finalize communication material

### **Notification Process Activities and Time Frame**

The notification process consists of the following activities:

1. Notice to AFGE
2. Notice to staff
3. Meeting with field office employees
4. Regional notification to local congressional offices
5. D.C. Level Congressional notifications
6. Regional Management Operations' Support notifies GSA (GSA notifies lessor)
7. Communication material distributed to stakeholders and community leaders
8. Congressional letter mailed to confirm notifications
9. Office consolidates

### **Outreach Activities and Messaging**

The Regional Commissioner (RC), working with the Regional Communications Director (RCD), directs outreach activities and contacts.

The RC and RCD develop messaging that includes factors leading to the consolidation decision.

The RC and RCD will work with field office managers to ensure:

- All stakeholders and community leaders are identified,
- There is a clear understanding of the needs of the community, and
- The concerns of the service area are appropriately addressed.

After all outreach activities and contacts are complete, the RCD is the point of contact for questions from stakeholders, the media, and the public. The RCD also handles all requests for information and interviews.



Securing today  
and tomorrow

*2016-2020*

*Office of the General Counsel*  
**STRATEGIC PLAN**

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One OGC: Here to Serve  
Excellence | Integrity | Judgment

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## Message About OGC's Strategic Plan

*Colleagues,*

*We are excited to share the Office of the General Counsel's Strategic Plan for 2016-2020. As public servants, we can all embrace the honor of our service and take pride in the service we provide to the agency and to our nation.*

*Through this plan, we will focus on six areas to advance our organization over the coming years. The plan's initiatives will help us to:*

- *better serve our client;*
- *communicate more clearly inside and outside of our office;*
- *provide increased opportunities for focused training and developmental opportunities and;*
- *better apply technology and analyze information in inventive ways to support our mission.*

*As we execute on our new plan, we count on each of you to join us in enthusiastically contributing to our strategies, initiatives, and overall success.*

*We look forward to shaping our organization together.*

*The Leadership Team*

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## Overview of Our Strategic Plan

The Office of the General Counsel's (OGC's) primary mission is to provide legal and privacy protection services to our client agency. However, we recognize that we best accomplish our mission through strong relationships with not only our clients, but also with our government partners and other stakeholders, including the bench and bar.

Our success in litigation, solid legal advice, focus on protecting privacy interests, and strong recruitment efforts provide a solid basis to serve our clients more successfully for the decades to come. As the complexity and volume of our workload continue to grow, though, it is imperative that we focus our resources and improve our knowledge management systems and processes. Doing so will enable us to continue to meet our client's needs while further developing our people and improving our work processes.

To leverage our momentum, we have developed a strategic plan that targets our most critical organizational needs, provides innovative steps to guide us forward, and focuses on actions we can take now and in the near future.

Our Strategic Plan serves to identify the critical priorities that will move us toward a future where:

- *Clients seek us out because they value, respect, and trust our advice; and because we are client service-focused.*
- *We speak with One OGC voice in the courts and to clients, partners, and stakeholders.*
- *We have a cohesive culture with a focus on our people.*
- *We communicate clearly, timely, and accurately.*
- *We make thoughtful decisions quickly and adjust based on new information.*
- *We use advanced technology that supports our work environments.*
- *We are on the cutting edge of – and drive discussions on – privacy in the public sector.*

Our service allows our agency to deliver benefits to America's most vulnerable population in ethical and responsible ways. Our Strategic Plan describes our collective commitment to ensuring that we serve the agency and the American public as effectively as possible as we move forward. We will transform OGC into an even stronger organization.

We are One OGC – here to serve with a commitment to excellence, integrity, and judgment.

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## Approach to Our Strategic Plan Development

Our Strategic Plan is the culmination of several months of collaborative effort by a team of OGC leaders, including staff contributions. We used this time to define the most important focus areas for our organizational growth and, within these focus areas, to identify innovative and immediate ways to strengthen OGC. The result is a set of six focus areas, which cascade directly from Vision 2025, the Agency Strategic Priorities and the Agency's Critical Priorities:

### SUPERIOR CUSTOMER EXPERIENCE



- A. Strengthen Our Client, Partner, and Stakeholder Relationships**
- B. Improve Our Communications**

### EXCEPTIONAL EMPLOYEES



- C. Enhance Our Recruitment, Hiring, and Retention**
- D. Promote Employee Development and Engagement**

### INNOVATIVE ORGANIZATION



- E. Improve Our Virtual Workforce Experience**
- F. Use Data to Inform Decisions**

Sections A-F of this document provide a high-level summary of each of the six focus areas. Included in each of these summaries is a narrative of what the focus area entails, a specific set of “outcomes” we will achieve by 2020, and the key initiatives that will drive us to those outcomes. Separately, we will have shorter-term goals and milestones that will help us achieve these longer-term objectives.

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## A. Strengthen Our Client, Partner, and Stakeholder Relationships



### Summary

We are committed to creating a client, partner, and stakeholder focus in how we communicate and deliver results. We will continue to strengthen our existing relationships with each of these groups to understand their needs better and, as a result, to serve them more effectively.

We will use innovative approaches, such as virtual detail programs across the agency to deepen our knowledge of our client and agency work environments. In addition, we will create tools that leverage existing knowledge and best practices to identify and respond to common client requests to improve our agility, quality, and responsiveness. These actions will improve the quality of our work and our relationships with our clients, partners, and stakeholders and will lead to better results, including more responsive legal and privacy guidance and desirable resolutions of legal and other issues.

We will enhance our relationships with the client we serve, the partners we work with, and the stakeholders whose interests are important to us.



### Outcomes to Achieve by 2020

- We consistently provide timely, accurate, and excellent legal services to our clients. With an improved understanding of our client's needs and a proactive approach to identifying its future needs, we are able to enhance both our responsiveness and the quality of our services. We communicate clearly with our government partners and engage in or support activities that benefit our national goals. We also provide pertinent information to and respond appropriately to stakeholder requirements or requests.



### Key Initiatives

- Improve our communications with our clients, partners, and stakeholders through new avenues for mutual information sharing, provide training in client-centric communications, and create stronger methods of engagement, including bench-bar meetings and other methods to enhance the flow of information.
- Assess client challenges and concerns through existing and new channels, e.g., client surveys and focus groups, to assist clients in better identifying potential issues/risks of actions and decisions to provide a more proactive and responsive approach to their needs.
- Become better integrated into our client's work processes through innovative programs, such as detail programs (including virtual details) that rotate OGC staff and leaders to other client components and bring other component staff into OGC as the budget allows.
- Place common client, partner, and stakeholder requests into intuitive and readily available tools, e.g., Frequently Asked Questions, to enhance consistency, quality, and speed in responses to regular requests.

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## B. Improve Our Communications



### Summary

Communicating more often, consistently, and effectively will allow us to improve all aspects of our work.

We will focus on communicating better inside and outside of our organization to inform and educate our staff and to ensure that our clients, partners, and stakeholders know how to engage with us and recognize the value we can provide.

Through this focus, we will ensure that we all have the information we need to work with each other, our clients, and our partners in a more collaborative manner to improve the quality of our work and the value we provide.



### Outcomes to Achieve by 2020

- Our internal and external communications are clear, consistent, and timely – allowing our staff to build trusted and valued relationships with each other and with our clients, partners, and stakeholders



### Key Initiatives

- Provide employees with the skills, tools, and technology to communicate effectively, including training, web-based information sharing tools, enhanced standards for written communications, and improved internal communication processes.
- Establish subject matter expertise workgroups to promote national consistency in work products and provide training in areas of expertise to clients and OGC staff.
- Develop OGC One Voice products, similar to agency messages, to keep our clients, partners, and stakeholders informed on our efforts and on areas that affect their work.
- Listen to our clients, partners, and stakeholders to find proactive ways to support and educate them and improve the level of service we provide.

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## C. Enhance Our Hiring, Recruitment, and Retention



### Summary

We are committed to strengthening our recruitment and retention programs to build and sustain a talented and diverse workforce.

We will identify innovative ways – and build on current programs – to attract and retain the best and the brightest. These efforts will include refining, standardizing, and strengthening our hiring and retention programs. We will also continue to expand our efforts around diversity and inclusion, identifying new mechanisms to attract and support a diverse workforce.

With this focus, we are committed to attracting, supporting, and retaining our employees through our recruitment, hiring, and retention programs.



### Outcomes to Achieve by 2020

- Our recruiting, hiring, and retention practices have enabled us to attract and retain a talented and diverse workforce that is committed to our mission in serving the agency.



### Key Initiatives

- Refine our hiring process for staff and leadership positions by identifying innovative programs and approaches to recruit talented candidates in a competitive landscape.
- Identify mechanisms for increasing diversity and inclusion in recruitment, e.g., attending affinity bar conferences as appropriate, attending job fairs that specifically promote diversity, creating partnerships with law schools, and creating mentoring programs.
- Standardize onboarding for all staff (both attorneys and non-attorneys) to build a more consistent experience and, as a result, a more cohesive culture.
- Develop our retention plan to foster and support a talented and diverse workforce.

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## D. Promote Employee Development and Engagement



### Summary

Employees are the heart of our organization and must have the right skills and capabilities to best serve our clients and support our partners and stakeholders.

To build a more engaged and cohesive workforce, we will identify innovative ways to provide developmental opportunities, strengthen training programs, and increase interactions across OGC. We will create developmental pathways to allow our staff to navigate their careers within OGC and move toward leadership positions.

With this focus, we will support and engage employees throughout their careers at OGC.



### Outcomes to Achieve by 2020

- Our high-performing workforce consistently exhibits the highest standards of excellence, integrity, and judgment in meeting our and the agency's missions.



### Key Initiatives

- Foster opportunities for staff who seek to develop into leaders, identifying new developmental opportunities to bolster skills and leadership capabilities, such as detail programs (including virtual details) across the agency and participation in the OGC Leadership Development Program.
- Strengthen our focus on staff development, including improving our training programs and creating developmental pathways for all employees.
- Identify ways to build a cohesive culture to improve employee engagement and increase consistency in serving our clients and supporting our partners and stakeholders.

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## E. Improve Our Virtual Workforce Experience



### Summary

We are committed to ensuring our employees have the necessary tools to foster a cohesive, flexible, and effective virtual working environment.

We will explore innovative ways to understand our technological needs, including developing a super user community and a strong partnership with the Office of Systems to provide recommendations and inputs into enhancing our virtual work experience. We will also identify ways in which to increase opportunities for all of us to connect and interact in order to maintain consistency in our approaches to our work and business process to deliver consistent quality nationally.

Through this focus, we will ensure that all OGC staff and leadership experience a flexible, productive virtual work environment that offers them the tools, community, and collaboration they need to perform their jobs and stay connected across OGC.



### Outcomes to Achieve by 2020

- OGC uses existing and new technologies to maintain a productive, collaborative, and cohesive virtual work environment across the country that delivers consistent and quality services.



### Key Initiatives

- Use innovative approaches to identify and meet virtual work environment needs, such as building an OGC super user community to assist in understanding how we can best use technology in OGC.
- Enhance our use of existing technology and new technologies, including partnering with the Office of Systems to leverage agency level tools and technologies.
- Benchmark other OGCs within the federal government on their telework practices and successes.
- Improve our existing virtual work experience to enhance employee retention, morale, and work/life balances, including identifying ways to maintain office culture in a virtual environment.

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## F. Use Data to Inform Decisions



### Summary

We are committed to providing our client and employees with timely information to improve the quality of our work.

We will build an analytics infrastructure that uses data to better inform our decisions, increase efficiency and productivity, and provide our staff with the information they need to make well-informed decisions and provide quality service.

Through this focus, we are committed to equipping our staff with the information needed, in a timely manner, to allow us to perform our work more effectively, efficiently, and accurately.



### Outcomes to Achieve by 2020

- OGC uses business intelligence to increase workload efficiencies and accountability—resulting in our providing quality service to our client, partners, and stakeholders.



### Key Initiatives

- Build an analytics infrastructure, including tools and reporting, that provides our entire staff with improved business information to enhance our individual and collective work efficiencies and quality.
- Identify new ways to use data to enhance our ability to provide timely service and equip employees with the skills necessary to use analytics effectively.

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## Summary of Next Steps

To ensure that our Strategic Plan is actionable and drives us toward our vision for 2020, our teams have initiated several key activities to test their efficacy and to produce several results quickly. For example, we are already piloting client and Department of Justice surveys and a staff training survey.

Over the next several months, the Leadership Team will identify additional pilot programs and milestones for our focus area initiatives and will assign owners, including staff, within OGC to drive these actions forward. Where possible, we will engage other agency components to support activities to further our vision for 2020.

As we begin to see results and meet key milestones, we will assess our strategic planning activities to determine if they are having the desired impact on OGC. To do so, the Leadership Team will meet regularly, with staff input, to measure the effectiveness of these activities over time and to shift focus, expand programs, or identify new activities, as we meet new challenges in an ever-changing environment.

With this continued concentration on our focus areas, initiatives, and activities, we will adjust our strategy over time – ensuring that it is a “living” and evolving process to produce the richest results possible in service to our clients and support of our employees, partners, and stakeholders. Together, we will create a better OGC – here to serve with a commitment to excellence, integrity, and judgment.

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*OGC: Here to Serve*  
*Excellence Integrity Judgment*

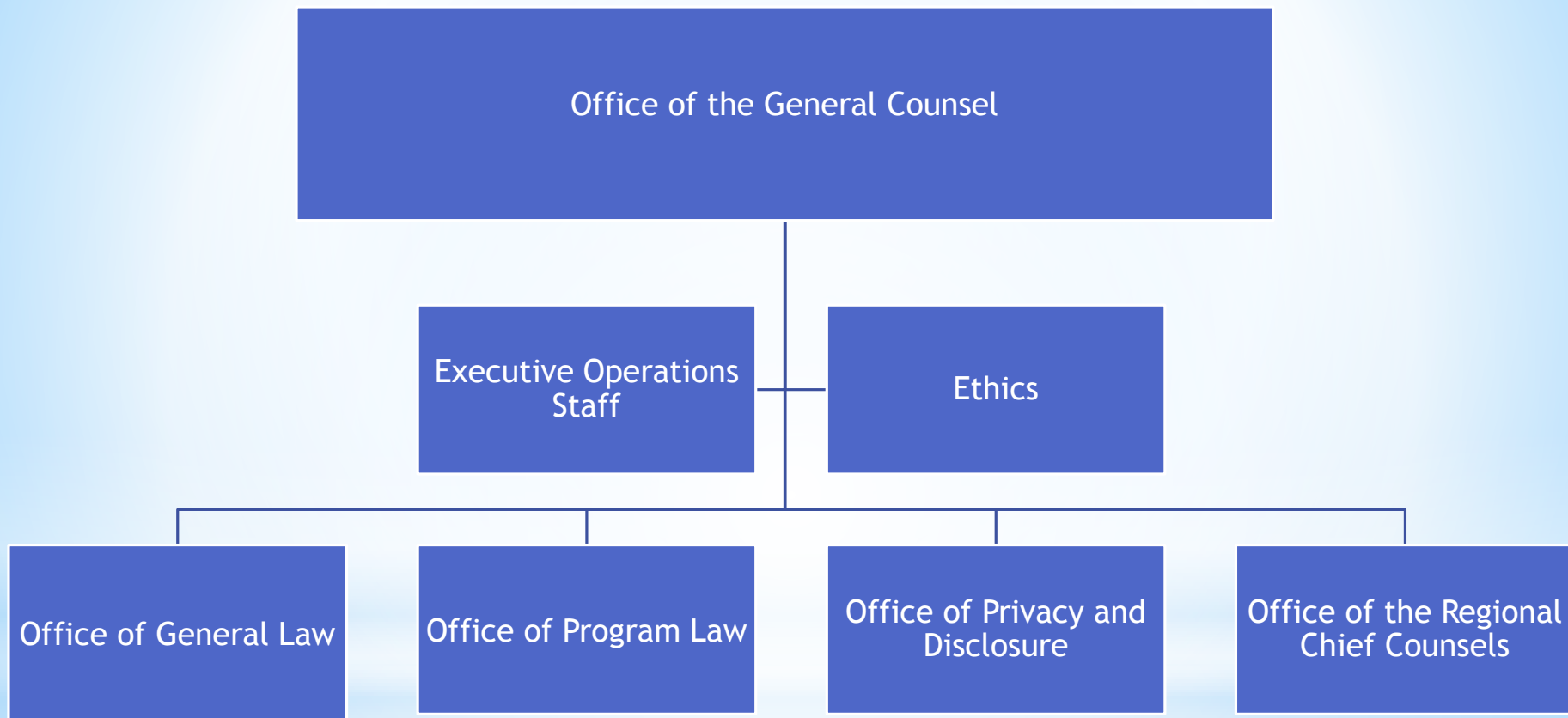
November 30, 2016

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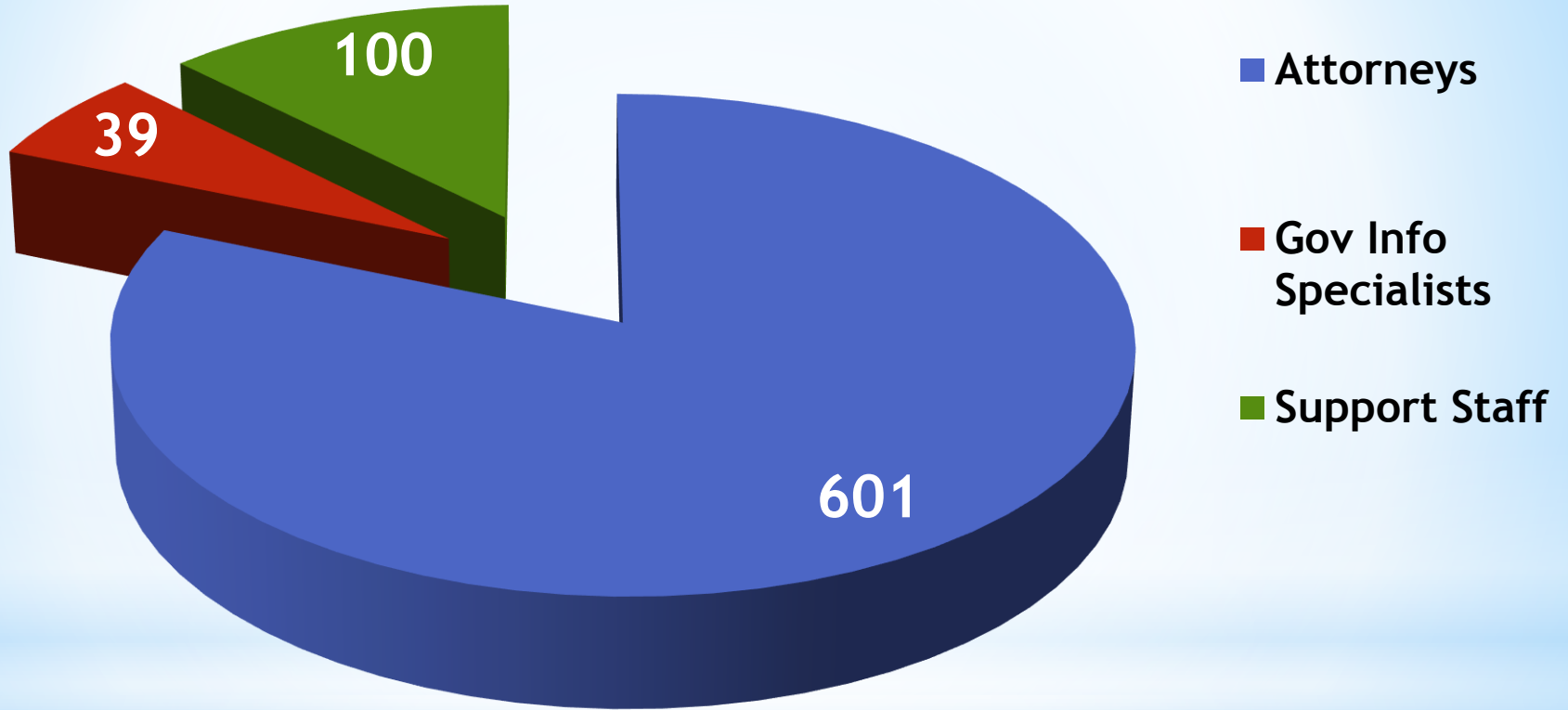
# Overview/Agenda

- Who We Are
- What We Do
- Discussion

# WHO WE ARE



# Who We Are



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only.

**Total Staff = 740**

# Regional Staffing Numbers for FY 15

Region	OGC	Operations	ODAR
Boston	38	1,521	370
New York	56	4,150	764
Philadelphia	71	4,495	1,162
Atlanta	72	8,731	2,059
Chicago	81	6,093	1,534
Dallas	74	4,691	1,016
Kansas City	55	2,594	951
Denver	44	897	241
San Francisco	72	6,305	1,059
Seattle	52	1,744	322
<b>Total</b>	<b>615</b>	<b>41,836</b>	<b>9,478</b>

# WHAT WE DO

## *OGC provides the agency with legal counsel and representation to protect the agency's legal interests*

- **Office of Program Law** supports the agency programmatic policy development and represents the agency in program litigation, including issues of first impression and of national significance.
- **Office of General Law** provides legal support and representation on non-programmatic matters, including fiscal law, personnel and employment law, contract law, and tort law.
- **Office of Privacy and Disclosure** develops and implements privacy and disclosure policies under applicable privacy laws and guidelines.
- **Regional Offices** provide legal advice to regional leaders, provide representation in program litigation, and manage fraud prosecutors.
- **Ethics Office** provides ethics training, advice and counsel, and financial disclosure review to agency employees.



# Office of Program Law

- Provides a full range of legal services and advice (including administrative and court litigation) regarding the agency's operations and administration of its various programs under the Social Security Act.
- Drafts and reviews SSA regulations, Federal Register materials, proposals for legislation and specifications for such proposed legislation.
- Drafts reports and letters to congressional committees, the Office of Management and Budget, and others on proposed legislation and legislative matters; and proposed testimony of SSA officials before Congress.
- Represents SSA, in concert with the Department of Justice, in litigation challenging agency policies and procedures, the constitutionality of provisions of the Social Security Act, and benefit claim determinations. Anti-Fraud programmatic and litigation support particularly on large fraudulent schemes.

# OPL Workloads for FY 16

OPL Workloads	Processed
Regulations	39
Controls	21
Legal Review and Advice	901
Dispositions	758
Briefs	525
RVR Requests	136
Appellate Dispositions	16

# OPL Highlights

Same Sex Marriage and Transgender Legal Opinions

Support Agency Policy Development Related to Supreme Court's *Obergefell v. Hodges* Decision

National Instant Criminal Background Check System (NICS) Policy Development

Treasury Offset Program (TOP) Litigation

# Office of General Law

- Provides all legal services to the Commissioner and every Headquarters component on non-program legal issues affecting the agency's operations and employees with an emphasis on contracts, administrative and court litigation, appropriations law, property management issues and security matters (regional involvement).
- Provides legal advice on the agency's duties and responsibilities under the Privacy Act, the Freedom of Information Act, Section 1106 of the Social Security Act, and related laws.
- Advises agency components with legal advice and appropriate related representation on labor and employment law matters, including playing an integral role in supporting the agency's bargaining activities.
- OGL head serves as the agency's *Touhy* officer, handling requests for y agency employee testimony in private matters.

# OGL Workloads for FY 16

Workloads	Processed
Civil Rights	6
Legal Review & Advice	2,164
Subpoenas	6
MSPB	13
EEOC	46
LMR	11
Misc. Court Cases	15

# OGL Highlights

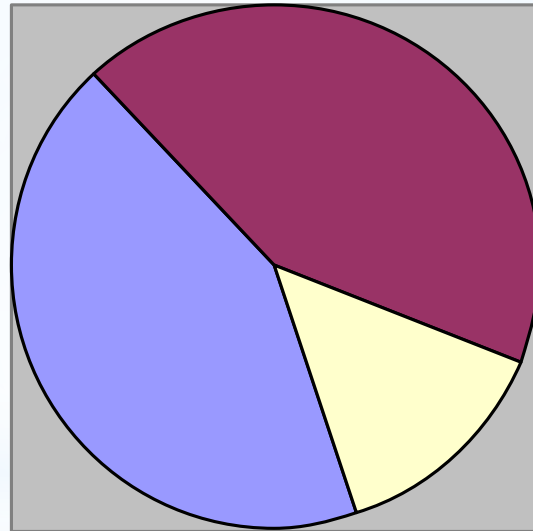
- Legal advice on the disclosure of personally identifiable information in agency records including data exchange agreements with local, state, and federal agencies
- ALJ discipline litigation
- Represent the agency in multi-million dollar contract disputes
- Support on budget execution, including the legal support for certain budgetary priorities



# OGL - SAFEGUARDING THE AGENCY'S CONTRACTING PROCESS

- OGL successfully resolved four GAO bid protests that arose in FY16
- OGL successfully defended two appeals before the CBCA in FY16
- The total value of contracts OGL defended totaled approximately \$60 million
- In FY16, OGL attorneys provided legal advice in over 60 major procurements valued at approximately \$500 million

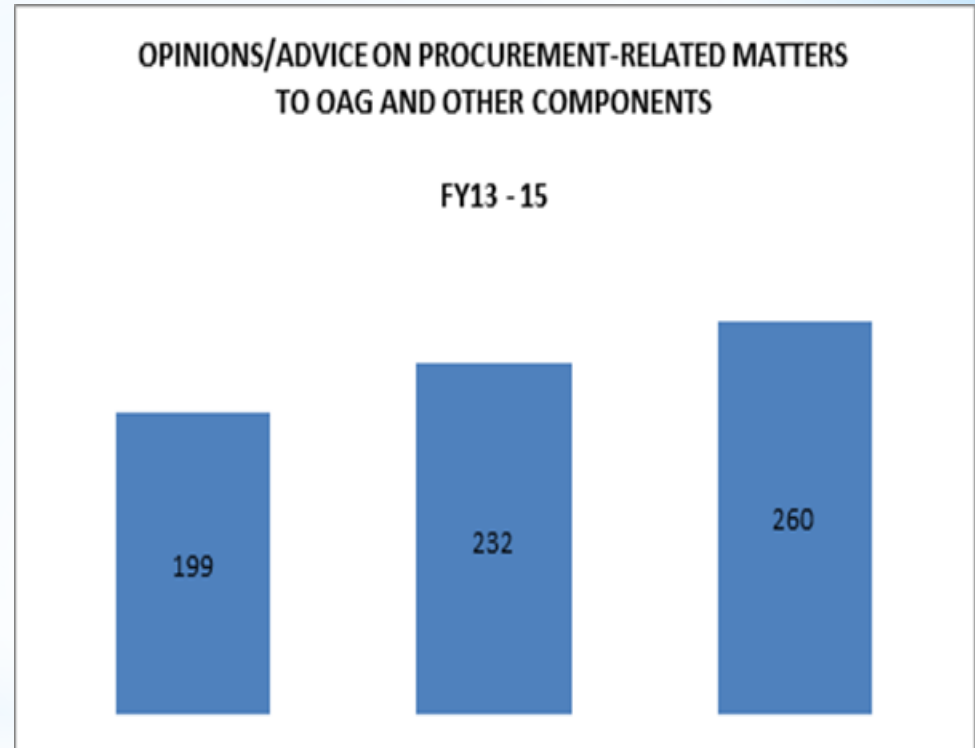
## 100% Favorable Resolution of GAO Bid Protests in FY 2016



- (1) Crosby Marketing and (2) Diversity Marketing - \$25 million contract
- (3) National Disability Rights Network - \$25 million contract
- (4) Executive Information Systems, LLC - \$8 million contract

## OGL - GROWTH IN PROCUREMENT RELATED ADVICE

- Over the past three years, OGL has seen an increase in over 30 percent in requests for legal advice in procurement-related matters.
- OGL has provided legal assistance with solicitation, statement of work, or award documentation on the procurements ranging from \$1,000 contracts to \$1.5 billion Information Technology Support Services Contract (ITSSC)





# Office of Privacy and Disclosure

- Develops national guidelines and assists in policy development related to requests for information under the Freedom of Information Act (FOIA)
- Develops national standards relating to the release and exchange of personal data in SSA databases to federal, state, and local agencies, and serves as the agency's focal point for all programmatic data sharing activities with outside organizations
- Reviews agency projects and initiatives to ensure compliance with the Privacy Act and related laws and regulations
- Examines public service issues related to handling various information requests from the public
- Prepares the Annual Report to Congress on FOIA activities, and reviews requests and determines whether records are required to be disclosed to members of the public

# OPD Workloads for FY 16

OPD Workloads (for 3 qtrs.)	Processed
Data Exchange	62
Disclosure matters	476
Privacy matters	331
FOIA	1,033
Agreements (IEA, CMPPA)	35
Production Documents reviewed	742

# Office of Regional Chief Counsels

Provides legal services and support to the Commissioner and the Regional Offices. Examples include:

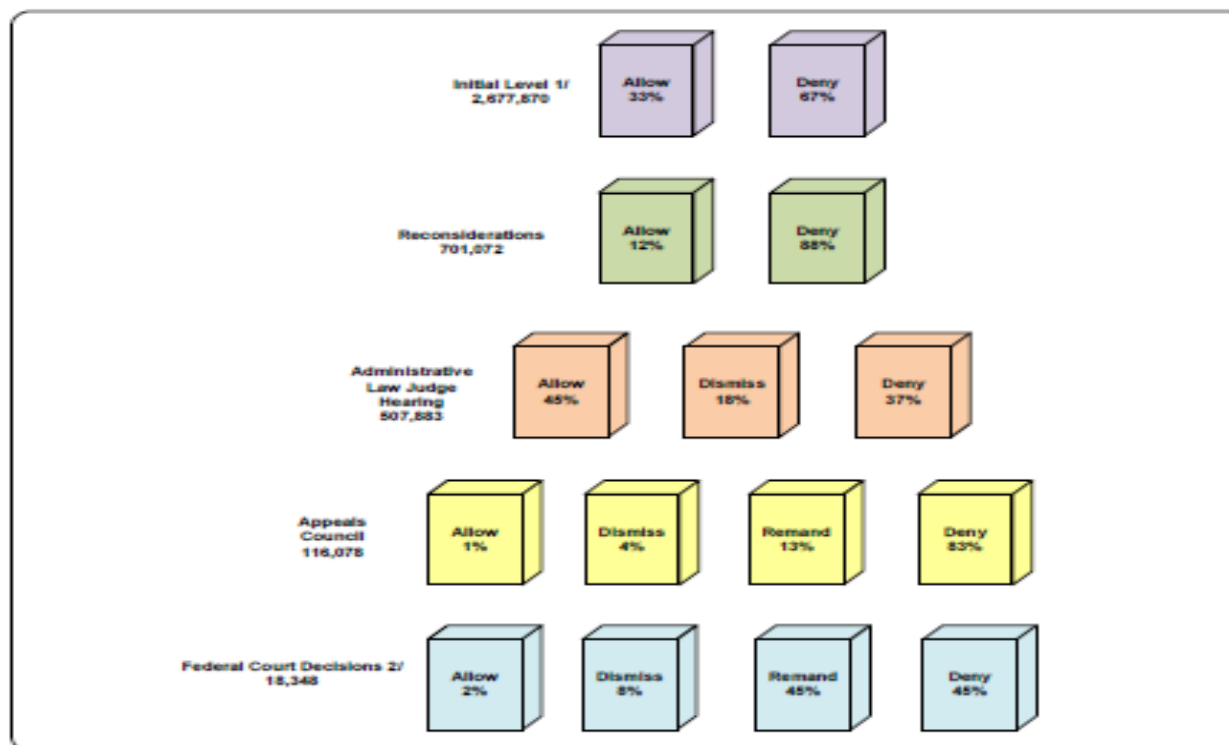
- Providing legal advice on matters arising in their respective geographic locations.
- Providing representation in program litigation before U.S. district and appellate courts.
- Managing the agency's fraud prosecutors in partnership with U.S. Attorney Offices.
- Protecting the agency's legal interests in bankruptcy litigation.

# Regional Workload for FY 16

Workload	Processed
Legal Review and Advice	2,206
Subpoenas	1,048
MSPB	87
EEOC	200
LMR	553
Civil Rights	100
Misc. Court Cases	54

# Program Litigation - Workflow

## FISCAL YEAR 2015 WORKLOAD DATA: DISABILITY DECISIONS\*



\*Includes Title II, Title XVI, and concurrent initial disability determinations and appeals decisions issued in FY 2015, regardless of the year in which the initial claim was filed, and regardless of whether the claimant ever received benefits (in a small number of cases with a favorable disability decision benefits are subsequently denied because the claimant does not meet other eligibility requirements.) Does not include claims where an eligibility determination was reached without a determination of disability. If a determination or appeals decision was made on Title II and Title XVI claims for the same person, the results are treated as one concurrent decision.

1/About 24% of initial level denials are issued in States that use the Disability Prototype process, which eliminates the reconsideration step of the appeals process. The first level of appeal for these cases is a hearing before an Administrative Law Judge.

2/ Federal Court data includes appeals of Continuing Disability Reviews.

NOTE: Due to rounding, data may not always total 100%.

Prepared by: SSA, ODPMI (Office of Disability Program Management Information)

Date Prepared: January 14, 2015

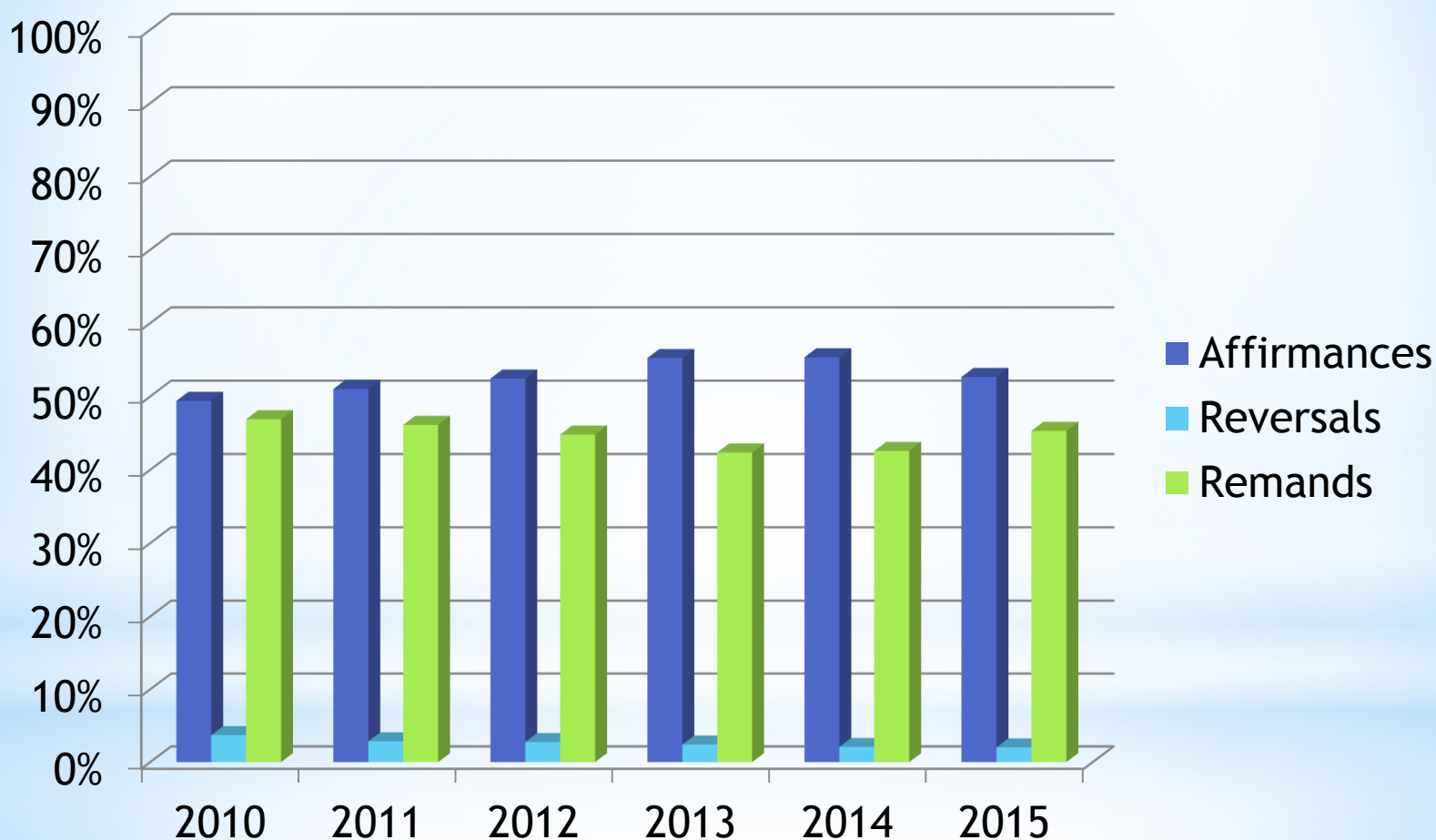
Data Sources:

1) Initial and Reconsideration Data: SSA State Agency Operations Report

2) Administrative Law Judge and Appeals Council data: SSA Office of Disability Adjudication and Review (ODAR)

3) Federal Court data: SSA Office of General Counsel

# Federal District Court Dispositions

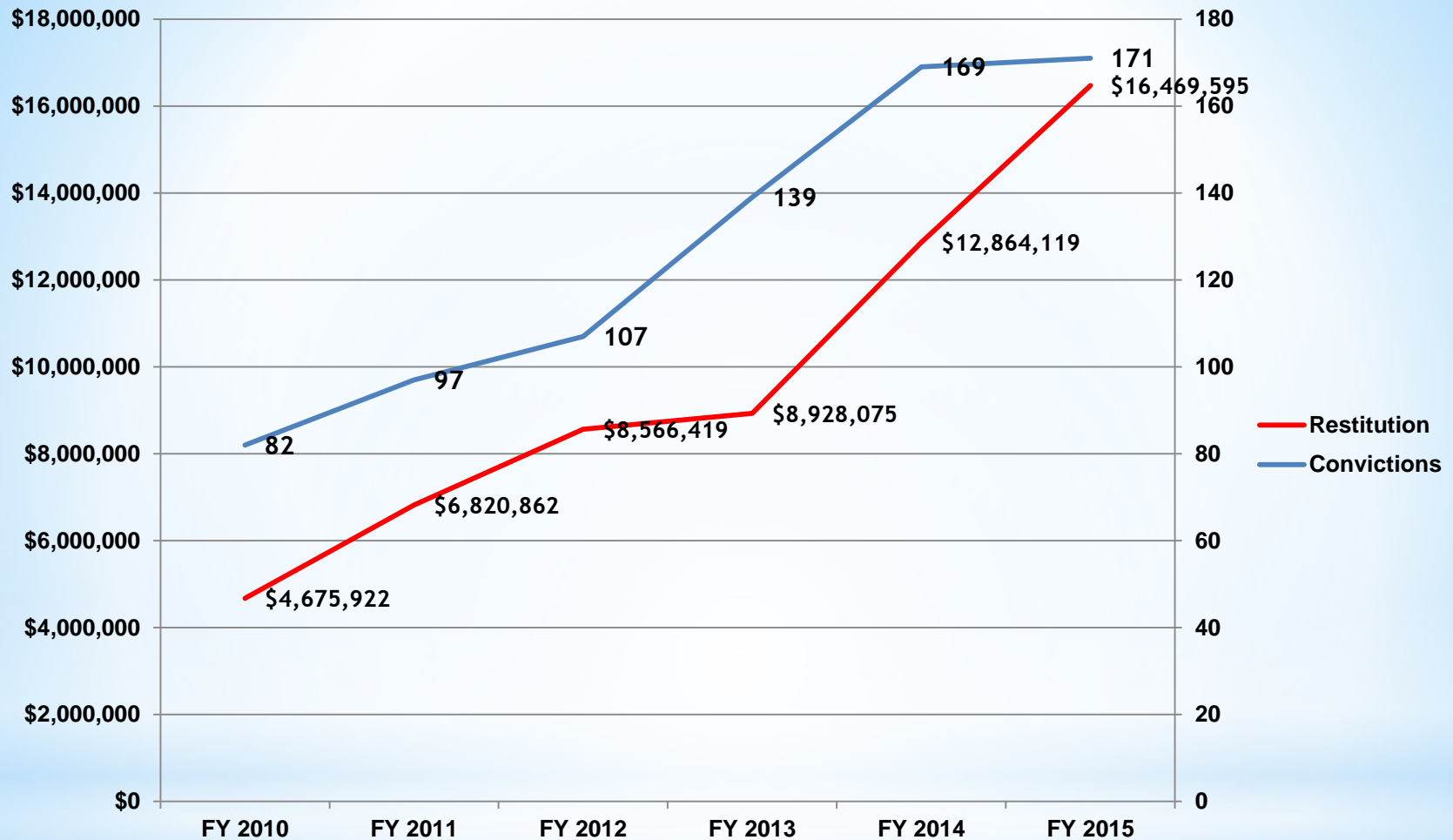


# OGC is Proactive

- Outreach and training for ALJs and decision writers
- Outreach and training on topics ranging from reasonable accommodation to ethics to e-discovery related issues
- Local rules changes
- Affirmative appeals
- Bankruptcy data analytics project (more on that in a minute)
- Anti-fraud project (more on that in a minute)



## Anti-Fraud Project



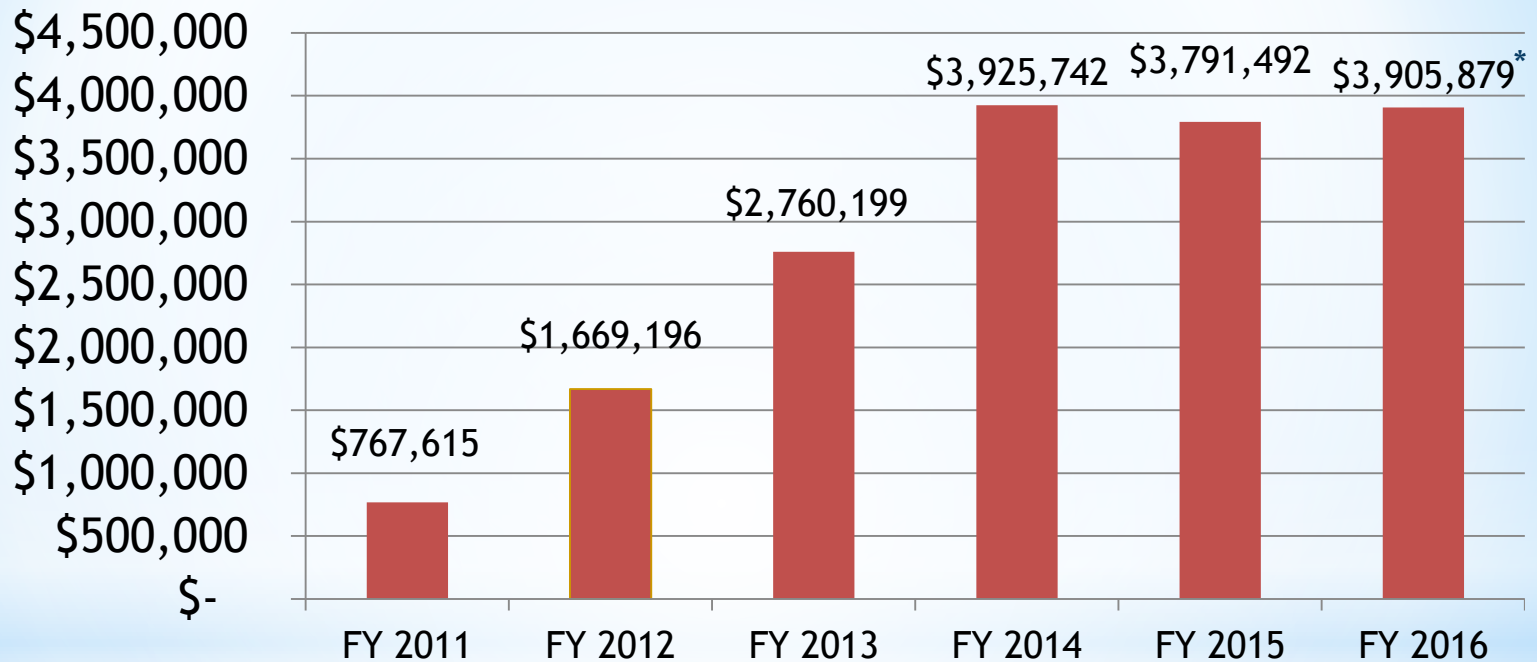
The additional 12 hires provided in FY 14 enabled us to have SAUSA's in 25 locations by the end of FY 15. We achieved 171 convictions that resulted in \$16.4 million in restitution ordered in FY 15.



# Bankruptcy Data Analytics Project

- Project Goal - Determine the optimum threshold amount to initiate OGC actions in order to remove SSA overpayments from discharge in bankruptcy.
  - Balancing the administrative cost of preparing an adversary action with the amounts removed from discharge.
  - Average administrative cost is roughly \$5500 when you factor in both actions that we pursue and actions that we don't pursue.
- 9,799 MBR records with Bankruptcy Codes.
  - \$123,792,202 = Total value of SSA overpayment debt subject to bankruptcy discharge.
  - 2,582 Claimants have over \$15,000 in SSA overpayment debt subject to bankruptcy with combined value of \$91.9 million.

# Combined OGC Bankruptcy Filings and Exceptions from Discharge: FY 11 - 16



Adversary Actions Filed	14	18	29	52	43	136
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\* Estimated values - data still being compiled (several actions are still awaiting court decision)

# FY 15 District Court Results

In FY 2015 district court, affirmances in program litigation cases total 9,654 cases. These wins result in savings to SSA's Trust Fund as evidenced below:

- ❖ 7,371 Title II and concurrent cases. Savings per case is \$260K (combined savings to OASDI and Medicare Trust Funds). (using actuary estimates).  $7,371 \times \$260K \text{ per case} = \$1.91 \text{ billion}$
- ❖ 2,283 Title XVI cases only. Savings per case is \$75K (combined savings for SSI/Medicaid).  $2,283 \times \$75K \text{ per case} = \$171 \text{ million}$
- ❖ **Over \$2.08 billion in total savings**

OGC's administrative cost for FY 2015 was approximately \$116 million.

# Ethics

## Ethics Training:

- The Ethics staff is providing supplemental Ethics training on a quarterly basis to Operations managers nationwide.
- Managers will receive the same training nationwide.
- Most regions have scheduled and/or provided the first quarterly training, which is on the Hatch Act.
- We provided training on:
  - Outside Activities/Fundraising - April 2016
  - Gifts - August 2016

# Ethics (continued)

## Advice and Counsel:

- We regularly provide advice and counsel to Operations employees and managers nationwide.
- We have also provided advice and training to Advisory Councils to ensure their regional activities comply with the Standards of Conduct.

## Financial Disclosure:

- We work with filers to ensure their OGE 450 forms are conflict-free and technically correct.
- We review OGE form 278-Ts, new entrant, and retirement forms for Operations filers.

# Data Exchange Agreements

## Overview

- Data Exchange Process
- Why an Agreement is Necessary
- Laws, Regulations, Policy
- Data Exchange Examples

# Data Exchange Agreements

## Data Exchange Process

- Length of Process
- Development and Negotiation
- Legal, Disclosure Policy, and Finance Review
- Agency Stakeholder Review
- Agency Representative Sign-off
- Data Integrity Board (DIB) Review and Approval\*
- DIB Chair Review and Approval\*
- Congressional and OMB Notice\*
- Federal Register Publication\*

\*Computer Matching Requirements



# Data Exchange Agreements

Why do we need an agreement?

- Purpose
- Legal Authority
- Disclosure Authority
- Identifies Data
- Access Parameter
  - Who will have access
  - Will the data be re-disclosed (federal, state, private, contractor)
- Retention and Destruction of Data
- Reimbursement



# Data Exchange Agreements

## Laws, Regulations, and Policy

- Privacy Act of 1974
- Computer Matching and Privacy Protection of 1988
- Social Security Act, 42 U.S.C. 1306
- Internal Revenue Code, 26 U.S.C. 6103
- Social Security Disclosure Regulations (20 C.F.R. Part 401)
- Office of Management and Budget Guidance

# Treasury Offset Program

- Two putative class action lawsuits
  - Grice
  - Heard
- Legislative proposal

## **OGC Bankruptcy Project—Factors Considered**

**Business Question:** What is the optimum dollar threshold to contest the discharge of Title 2 overpayments in bankruptcy cases, to get the best return on investment without causing undue burden to operational staff?

The factors that OGC took into consideration for deriving the optimal threshold to contest the discharge of Title II overpayments in Bankruptcy cases included:

- Title II Bankruptcy cases
- Overpayment amount
- Cost of an adversary action - \$7500
- Success rate in prosecuting adversary actions
- Time OGC attorneys spent processing all bankruptcy notices
- Time OGC attorneys spent assessing and preparing adversary actions
- Time other SSA components spent assisting OGC in preparing documents to support adversary actions
- OGC general wage of a GS 14, step five, with associated overhead costs

## **Office of Systems – IT Technical Staff Data**

**December 7, 2016**

- GS-2210s eligible to retire as of 11/30/16 = 1,057 out of 3,835 employees = 27.56%
- GS-2210s eligible to retire in the next 5 years = 1,684 out of 3,835 employees = 43.91%
- Average age = 48.
- GS-2210s represent all of DCS' Technical IT staff.

# Office of Systems

## Office of the Deputy Commissioner

Rob Klopp  
Deputy Commissioner/CIO

Don Henry (A)  
Executive Officer

### Chief Technology Officer

John Morenz

### DCIO & Cybersecurity

Herb Strauss – Deputy CIO/Senior  
Agency Official–Cyber Security

Marti Eckert, CISO/AC  
Andy Coale DAC (A)

### Office of IT Business Support

Sylviane Haldiman, ADC

#### Office of IT Programmatic Business Support

William Martinez, AC  
Djimy Chapron, DAC (A)

#### Office of IT Enterprise Business Support

Ann Amrhein, AC  
Vacant

#### Office of IT Financial Management & Support

Christopher Barrett, AC (A)  
Nadine Tracht, DAC

### Office of Software Engineering

Diana Andrews, ADC

#### Office of Systems Architecture

Dan Parry, AC  
Lester Diamond, DAC

#### Office of Enterprise Information Systems

Frank Sotaski, AC  
Jean Jackson, DAC

#### Office of Disability Information Systems

Rachel Dumser, AC  
Kleo Debelius, DAC

#### Office of Benefit Information Systems

John Simermeyer, AC  
Wayne Lemon, DAC

### Office of Systems Operations & Hardware Engineering

Tom Grzyski, ADC

#### Office of Systems Operations




Tom Fellona, AC  
Kishayra Lambert, DAC

#### Office of Hardware Engineering

Dave Thomas, AC  
Yateesh Katyal, DAC

November 2016

# Moving to the Next Mile

Alignment with Vision 2025	Critical Eight Priorities 2015-2016 Accomplishments	Agency Critical Priorities 2016-2017
<b>Superior Customer Experience</b> 	I. Enhance Online Customer Service	I. Advance Customer Engagement
	II. Reduce the Wait for a Hearing Decision	II. Advance Service Delivery in Our Disability Programs
	III. Educate the Public about Social Security Programs	III. Enhance Knowledge of Social Security Retirement and Disability Programs
		IV. Enhance Quality and Payment Accuracy for our Customers
<b>Exceptional Employees</b> 	IV. Improve Succession Planning	V. Invest in Our Employees
	V. Promote Employee Development and Engagement	
<b>Innovative Organization</b> 	VI. Transform the IT Investment Process	VI. Upgrade our Foundational Infrastructure
	VII. Establish a Program Management Office	
	VIII. Accelerate the Use of Data Driven Decision Making	VII. Modernize our Information Technology and Accelerate Data Driven Decisions

Transition Team  
Member Document--  
Non-Public Information.  
This document may be  
disclosed to Authorized  
Transition Team  
Members only.





# Office of Communications Transition Briefing

November 2016



Securing today  
and tomorrow

# Our Leadership

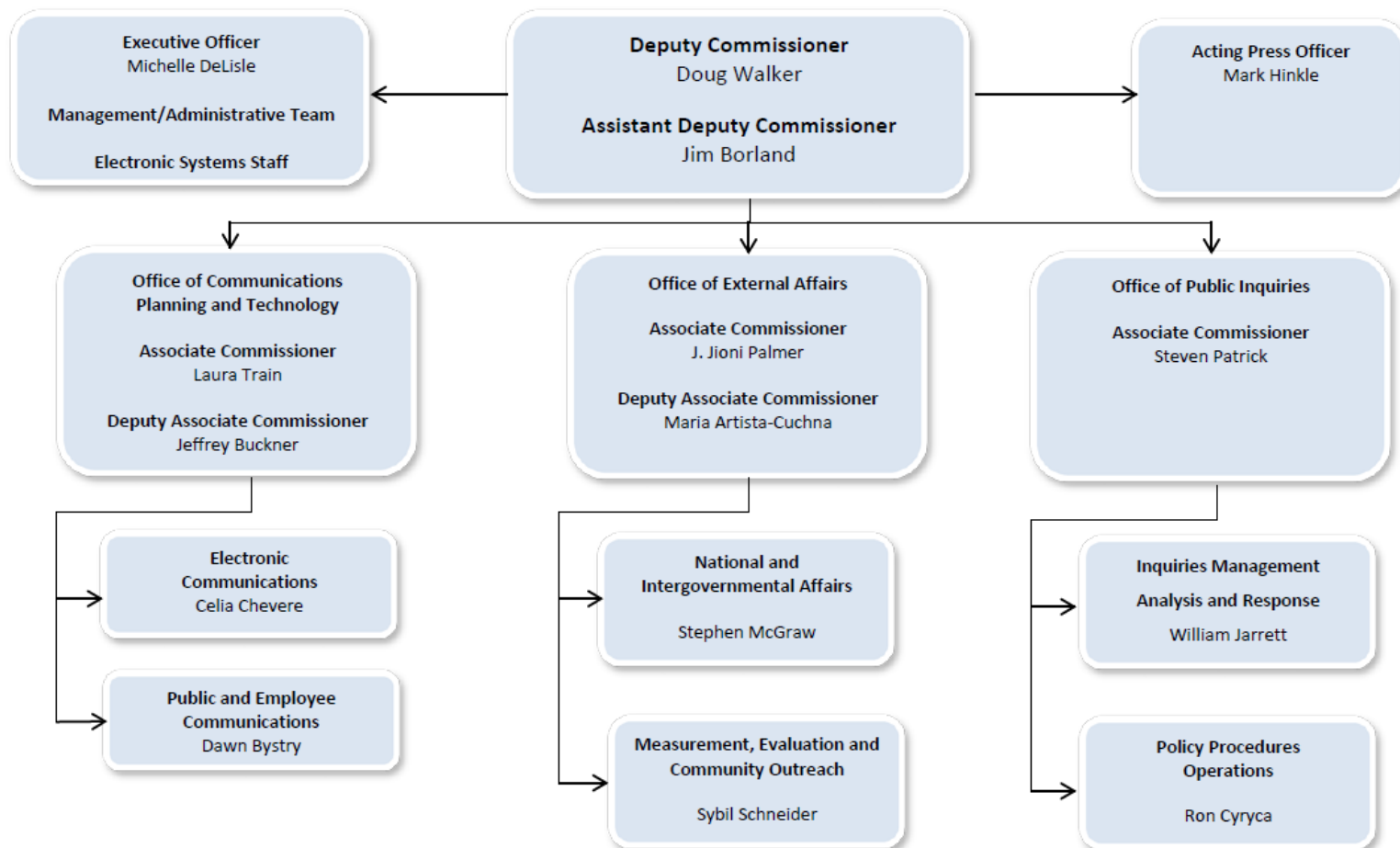
- **Douglas Walker**, Deputy Commissioner
- **Jim Borland**, Assistant Deputy Commissioner
- **Jioni Palmer**, Associate Commissioner  
External Affairs
- **Mark Hinkle**, Acting Press Officer
- **Laura Train**, Associate Commissioner  
Communications Planning and Technology
- **Jeffrey Buckner**, Acting Associate Commissioner  
Communications Planning and Technology  
*(effective December 11, 2016)*
- **Steven Patrick**, Associate Commissioner  
Public Inquiries



# Our Organization

## OCOMM Organization Chart

(Updated 11/1/16)



# Component Functions

- **Office of the Deputy Commissioner**
  - Leadership and coordination
  - Liaison with Office of the Commissioner
  - Communications strategy
- **Press Office**
  - Agency spokesperson for national media
  - Coordinate regional/local media
  - National press releases and media events

# Component Functions (continued)

- **Office of Communications Planning and Technology**
  - Internal and external communications products
  - Strategic marketing and planning
  - Video, photography, and graphics facilities
  - Agency web design standards
  - Captioning and translations
- **Office of External Affairs**
  - Liaison with national organizations
  - Outreach to specialized audiences
  - Social media development and engagement
  - Intergovernmental affairs

# Component Functions (continued)

- **Office of Public Inquiries**
  - Commissioner correspondence
  - Commissioner telephone inquiries
  - Plain language assessment and compliance

# Building Our Brand

## Social Security Brand Architecture

### Brand Promise – Securing Today & Tomorrow

***Brand Personality/Heart of the Brand - compassion, honor, integrity***

#### Support

*Delivering **financial benefits and programs** that **support** our customers through life's journey*

Fiscal stewardship/  
Solvency

Benefits:

- Disability
- Retirement
- SSI
- Survivors
- Spousal

#### Service

*Providing **world-class customer service** when, where and how it is needed, whether online, on the phone or in person*

Trusted information  
source

eServices

Website

Field Offices

N8NN

Partnerships

#### Security

*Ensuring the **safety and security of the information and resources** entrusted to us*

Anti-fraud

Cybersecurity

Data protection (PII)

80 year legacy and  
ongoing commitment

**Brand Mission – Promoting the economic security of the nation's people**



# Our FY17 Goal/Objectives

**Goal: Establish Social Security as the trusted and comprehensive resource that our customers turn to to help them secure today and tomorrow.**

## **Objectives:**

- Build awareness of who Social Security is and why we exist
- Make Social Security meaningful and relevant to our customers throughout their lives
- Make [socialsecurity.gov](https://www.socialsecurity.gov) the first place our customers go for information/tools for key life events (i.e. birth, first job, marriage, disability, retirement, loss).

## **Key Plan Considerations:**

- Full year view of the year of planned marketing activities
- Flexibility to take advantage of local/regional opportunities as they present themselves

## **The Occupational Information System**

**December 20, 2016**

**Prepared by the Office of Retirement and Disability Policy (ORDP)**

This document provides background information on the Occupational Information System (OIS) initiative discussed during the December 14 Office of Retirement and Disability Policy briefing with the Agency Review Team.

We are developing a new OIS that will replace the *Dictionary of Occupational Titles* (DOT) as the primary source of occupational information that we use in our disability adjudication process. Social Security policy requires that we follow a five-step sequential evaluation process to determine if adult claimants qualify for disability benefits. For steps 1 through 3, we consider the claimants' work activity and the severity of their medical impairments. At steps 4 and 5, we need information on the requirements of work to compare claimants' functional abilities with the demands of their *past work* as generally performed in the national economy and to determine if *other work* exists in the national economy that they can perform. We make the majority of our initial and hearings level decisions at steps 4 and 5.

Currently, we base most of these decisions on occupational information found in the DOT as well as paid testimony from vocational experts at a cost of \$60 million a year. However, the Department of Labor last updated about 80 percent of the occupations found in the DOT in 1977, with the other 20 percent having been updated in 1991. As a result, we are making decisions about a claimant's ability to perform their *past work* and *other work* based on data that no longer reflects the contemporary economy.

In order to provide our claimants with fair and accurate decisions, we are developing a modern database of occupational requirements with support from the Bureau of Labor Statistics (BLS). Experienced BLS field economists are visiting employers across the country to collect information about the current requirements of work that will meet our program needs and partially eliminate the need for vocational expert testimony.

Following three years of successful testing and improvements to the survey and methods, BLS began national data collection in 2015 with the goal of launching the occupational information system in 2019 after BLS has completed three years of data collection. Thereafter, we will maintain the OIS with data releases every five years.



**OSOHE Fast Facts**

**Mainframe Transaction Volume:**

180 million earnings records

- Process more than 5 million claims annually
- 141 million beneficiary records
- 70 - 80 million daily CICS transactions (average)
- 175 - 195 million daily online transactions (average)
- Daily total online transaction high 201,250,148 (January 12, 2016)

**Storage:**

- Mainframe: 20 Petabytes (PB) raw
  - Virtual Tape Systems: 17
  - Capacity: 11.8 PB
  - Silos: 17
  - Cartridges: 140,317
- Open Systems: 22 Petabytes (PB) raw
  - Virtual Tape Systems: 51
  - Capacity: 5.95 PB

**Network:**

- 125 Firewalls
- 4,727 Hosts
- 74 Load balancers
- 13 Nodes
- 97 Probes
- 3,489 Routers
- 5,282 Switches
- 13,718 Total devices
- 456,103 Total ports

**Client Server Operation:**

- 2,250 Local Area Networks
- 129,292 End User Devices (workstations and laptops)

**Mobile Communications**

4,500 mobile hand-held devices are currently in service; provisioned by 3 physical servers and 32 virtual servers

**OSOHE**  
**By the Numbers**

February 8th, 2016



The Office of Operations and Hardware Engineering

Design, build, monitor, protect, and sustain the systems infrastructure at the heart of the world's largest social benefit program.



**National Support Center**

**The National Support Center**

A Tier 3 data center with double redundancy

**Phase I—Completed in April 2015**

- Facility Cost: \$298 Million
- IT Migration Cost: \$202 Million
- Total Program Cost: \$500M
- Leadership in Energy and Environmental Design (LEED) Gold Certification
- Hot aisle containment
- Photovoltaic Solar Array 1.3MW
- Free cooling below 55 deg (145 days/year)
- Uptime Institute certified Tier 3
- 64% virtualization of open systems platforms.
- Passive solar heated water

**Data Center Facilities**

	National Support Center (NSC)	Second Support Center (SSC)	National Computer Center (NCC)
<b>Occupied</b>	2015	2010	1980
<b>Employees</b>	60 federal employees 120 facilities, security, and support staff	267 federal employees 131 Contractors (122 in SSC + 145 in RTP)	750+ federal employees 415 Contractors
<b>Sq. Ft.</b>	300,000	100,000	N/A
<b>Generators</b>	Six 2.5 MW Generators 1 MW solar Array	Seven generators that generate 2.25 MW each (4 dedicated)	Three Titan 130 Gas Turbine 13 Megawatts Each

**The NSC Inner Core:**

**NSC Hardware : EFFECTIVE MIPS**

- IBM zEC12 2827-HA1-712 (14,255 GP MIPS)
- IBM zEC12 2827-HA1-726 (25,457 GP MIPS)
- IBM zEC12 2827-HA1-725 (24,844 GP MIPS)
- IBM zEC12 2827-HA1-727 (26,613 GP MIPS)

**Coupling Facilities**

- 4— IBM zEC12 2827-H43-706 (6) with Internal Coupling Facility (ICF) engines (7,809 ICF MIPS each)

**The Mainframe environment comprises:**

- 28 logical systems (LPARs)
- 90 General Processor (GP) engines,
- 72 z-Series Application Assist Processor (ZAAP Engines)
- 9 z-Series Integrated Information Processor (ZIIP) engines
- 77 Capacity Back-Up (CBU) engines



## Second Support Center

The Second Support Center (SSC) provides operational assurance for the Social Security Administration. It is a fully-functional, co-processing data center operating in concert with the National Service Center (NSC) to provide world-class IT services for the American public. The SSC houses approximately one half of the Office of Operations and Hardware Engineering processing environment, and it operates around the clock, seven days per week, 365 days per year.

### SSC Inner Core

#### SSC Mainframe Computers:

##### **SSC Hardware: EFFECTIVE MIPS**

- IBM zEC12 2827-HA1-719 (20,144 GP MIPS)
- IBM zEC12 2827-HA1-706 (7,581 GP MIPS)
- IBM zEC12 2827-HA1-705 (6,281 GP MIPS)
- IBM zEC12 2827-HA1-705 (6,346 GP MIPS)

##### **Coupling Facilities**

- IBM zEC12 2827-H43-706 (4) with ICF engines (7,809 ICF MIPS)

##### **The Mainframe environment comprises:**

- 35 logical systems (LPARs)
- 35 General Processor (GP) engines,
- 19 z-Series Application Assist Processor (zAAP) engines
- 4 z-Series Integrated Information Processor (zIIP) engines, and
- 167 Capacity Back-Up (CBU) engines
- 2 IFL z-Series

There are total 1,102 physical servers and 1,515 virtual servers that enable agency infrastructure.

Total SSC GP MIPS = 40,352  
Total NSC GP MIPS = 91,139

## Organization

We manage the agency's 24/7 data operations, networks, and telecommunications. Our organization is led by Tom Grzynski, Assistant Deputy Commissioner (ADC).

Within the Office of Operations and Hardware Engineering, there are two AC-level components:

**Office of Hardware Engineering:**  
Dave Thomas, Associate Commissioner

**Office of Operations:**  
Tom Fellona, Associate Commissioner

## Monitoring & Responding

#### **Enterprise Operations Control Center:**

Composed of three teams: CICS Monitoring Room, Network Operations Center (NOC), and Master Scheduling; the EOCC provides 24x7 monitoring and support of critical O2HE services including CICS and mainframe environment, Agency's network (SSANET), and all batch job operations for internal components and external business partners. By extension, the EOCC includes the voice Network Operations Center for TSRP services, along with the CenturyLink and Verizon dedicated Network Operation Center.

#### **Visual Communications Control Center:**

Manages and supports satellite video telecommunications with over 1700 downlink training customers throughout the United States, Alaska, Hawaii, Puerto Rico and other outlying areas serviced by the Social Security Administration. The VCCC also supports the Video Teleconferencing (VTC), consisting of over 2,500 endpoints and the core network.

## Featured Capabilities

**Windows Dev/Prod Environment:** Provides a platform for managing the Software Development Lifecycle (SDLC) of SSA Windows-based production applications.

**Managed Linux Environment to the NSC.** Provides a platform for managing the Software Development Lifecycle (SDLC) of SSA Linux based production applications.

#### **Print Mail Facility:**

NCC and SSC print facilities provide approximately 23,000,000 SSN Cards and 6,000,000 notices to the public per year.

- The Kodak VL2000 is capable of printing 36,000 SSN cards per hour
- The Pitney Bowes MPS inserter is capable of inserting 15,000 cards per hour
- The Pitney Bowes FPS inserter is capable of inserting 8,000 notices per hour
- The Ricoh 4100 printer is capable of printing 20,000 notices per hour

#### **Electronic Messaging:**

- Infrastructure functions at NCC Service Delivery Point (SDP) - electronic messaging and collaborative services.
- Infrastructure functions at SSC SDP—electronic messaging and collaborative services.
- Infrastructure functions at RI SDP— electronic messaging.
- Infrastructure functions at KC SDP— electronic messaging and collaborative services.

#### **VPN/Remote Access:**

Number of VPN users: 7,500 approved users  
VPN Capacity: 10,000 concurrent connections

## Laboratory and Testing Facilities

#### **System Zero**

System Zero allows the Agency's network engineers to test and evaluate the integration of new network devices, upgrades to existing network devices, modified network configurations and the integration of new LAN/WAN services and network applications, such as voice and video.

#### **NET-F (Network Environment & Testing Facility):**

The NET-F provides testing environments for workstations, Active Directory network and enterprise servers, LAN peripherals (routers & switches), SAN access for virtual infrastructure devices, laptops, and printers.

#### **Unified Communications Lab**

Purpose is to Identify, Design, Build, and Test an IP Unified Communications infrastructure (Voice, Video, Chat, Data) for multi-modal communications with anyone, anywhere, anytime.

Provides a quantitative understanding of bandwidth requirements by utilizing call admission control, zoning and reservation systems for voice-video-data. Call admission control (CAC) provides a hierarchical mechanism for dynamic allocation of network resources.

#### **Integration Testing:**

Final integration testing and release-to-production pre-production testing facilities:

- Internet Testing Facility (9 workstations)
- Network Engineering & Testing Facility (120+ devices)
- VMware virtual environment (7 Servers, 50 TB)
- Security Testing Environment



# DISABILITY CASE MANAGER MODERNIZATION PLAN

# Good News about Important Updates to Your DCM System

Dear DCM Customer

MicroPact has some important and exciting news to share with you about planned updates to iLevy Case Tracking and VERSA CaseExpert, collectively known as Disability Case Manager (DCM). As part of our ongoing software maintenance commitment, we're ready to incrementally migrate the software you have been using to an advanced technology platform that will bring the DDS and SSA communities up to date with current enterprise software standards. Users will experience minimal disruption throughout the update, which, when completed, will result in an entirely modernized system that is more intuitive to use and less costly to maintain for decades to come. Our intent is for the update to be deployed incrementally over the next 2-3 years, but this pace can be accelerated or moderated at customer preference.

This product roadmap lays out a plan for you that is:

- **Smart.** There will be a single core system for all DDSs, which will enable us to efficiently push out both universal updates and state- and agency-specific configurations.
- **Low-risk.** You will experience a seamless, incremental update of discrete areas of functionality (hence referred to as modules) over several years, with no loss of existing functionality, no disruption in service, and no "big bang" cutover to a completely new system.
- **Low-cost.** The cost of the core modules for existing license holders is fundamentally covered under your existing software maintenance contract, with implementation costs and any unique configurations and interfaces billed separately.
- **State-of-the-art.** The new web-based technology will reduce your hardware maintenance costs and resource requirements by fully transitioning to low cost, high performance commodity infrastructure sited at a customer preferred location(s) or in the cloud.
- **Intuitive.** By preserving all existing functionality and expansion of these core features, the updated system will require minimal retraining beyond adjusting from old but familiar green screens to intuitive user interfaces.

Rationale

As you probably know, MicroPact is a major vendor in the disability case management marketplace. Forty-seven of the 54 U.S. state and territory DDSs rely on legacy MicroPact software to manage their caseloads. Currently, 30 agencies are on one platform (iLevy Case Tracking, launched in 1980), and 17 agencies are on another platform (VERSA CaseExpert, launched in 1985). Both applications are solid workhorses that have been enhanced annually to keep current with all state and federal regulations.

With the 2015 merger of Iron Data and MicroPact, iLevy and VERSA became part of a larger portfolio of case management solutions. One of the stated goals of the merger was to find opportunities to enhance our technological capabilities and offerings. DCM customers are among the first who will benefit from the ensuing analysis.

Updated Platform, Same Solution

The updated DCM COTS solution will be built on entellitrak®, MicroPact's commercial off the shelf (COTS) platform for case management and business process management (BPM). A highly

configurable platform based on open standards and open architecture, entellitrak was launched in 2006 and is used across the federal government as a case management and BPM platform of record. In 2015 IT industry analyst Gartner recognized entellitrak in its first Magic Quadrant for BPM Platform-Based Case Management Frameworks, saying that, "MicroPact entellitrak provides an open architecture platform that enables easy configuration, fast development, and low costs." All MicroPact-hosted entellitrak solutions meet the federal government's stringent FedRAMPsm requirements.

Roadmap

Your DCM update will occur as a series of stepped releases, primarily consisting of replacement modules that will plug into an enhanced version of the legacy DCM messaging service software (see illustration). Once the replacement module passes acceptance test environment (ATE), the legacy technology counterpart will be retired.

The anticipated release cadence is 1-3 releases a year, subject to change based on complexity. Additional updates required for system interoperability and to reflect changes to SSA policy, judicial rulings, or legislation will continue to be priced and delivered separately per your agency's current DCM IDIQ.

Agency-specific Considerations

No DDS is the same. The single entellitrak platform will not only facilitate delivery of universal updates tied to new SSA regulations, but it will also make it easier to configure the software based on unique state-level DDS mandates and fiscal business practices, as well as other non-SSA requirements. (For example, currently 16 DDSs use DCM for Medicaid case management. Those workflows and records will all be carried forward into the modernized system.)

Next Steps

I hope you're as excited about these coming updates as we are. In the next few weeks the MicroPact DCM Team will be reaching out to schedule a demonstration of the modernized, next generation DCM solution and to answer any questions. If you'd like to speak to someone before then, please contact Chuck Barthlow, Vice President, Disability Case Management, at 314.744.7363.

Best Regards,

*Tom*

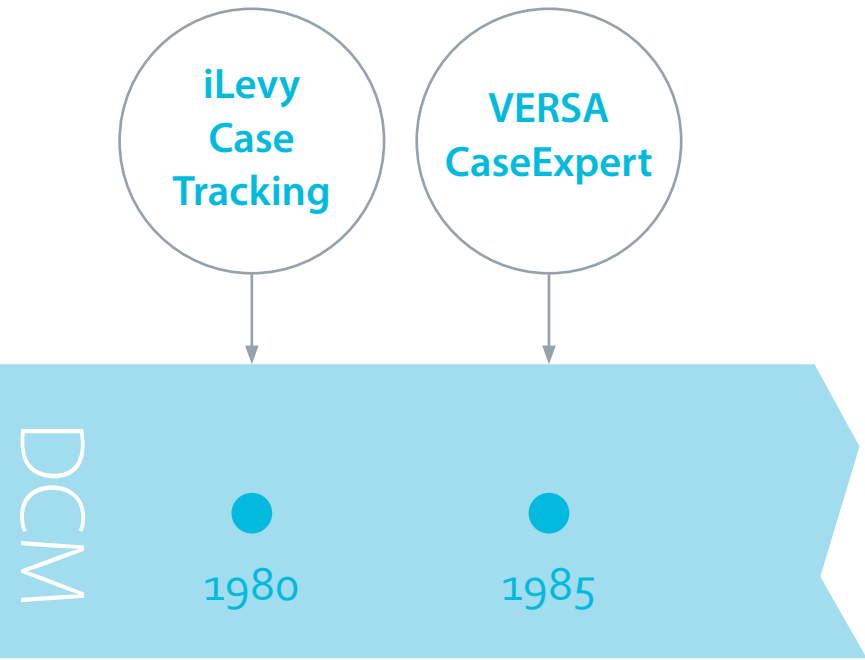
Tom Sechler  
CEO  
MicroPact

# A Seamless Modernization

The modernization of iLevy Case Tracking and VERSA CaseExpert technologies, collectively known as Disability Case Manager (DCM), will be executed through a series of stepped releases.

Each step-over will update discrete areas of functionality, while maintaining continuous system access and service.

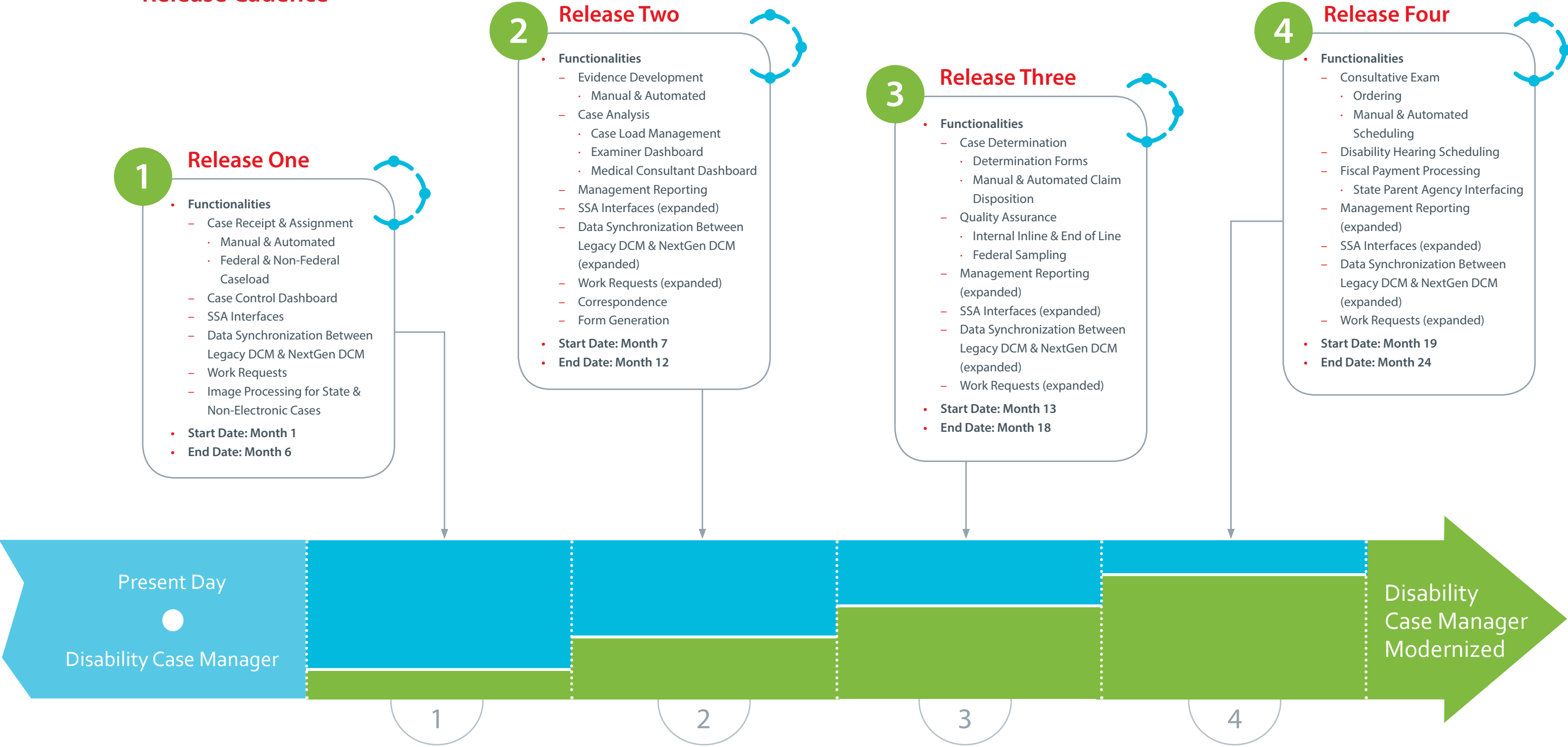
In the end the SSA and DDSs will have a single core system that can be maintained through universal updates and state- and agency-specific configurations.



# Disability Case Manager Modernization Plan

A Low Risk, Low Cost, Incremental Stepover Process

## Recommended Upgrade Release Cadence






# DELIVERING ON SSA's DCPS PROMISE

Specifically designed to meet all DCPS technical objectives and assurances.

CONSOLIDATED		FLEXIBLE	
<p><b>Single Core:</b> Commercially available COTS codebase with a modern UI/UX</p> <p><b>Extensible and Interoperable:</b> Support for current and future DDS systems</p> <p><b>Adaptable:</b> Configuration of policies and interfaces to meet DDS specific requirements</p> <p><b>Modular:</b> Off the shelf analytics, document management, public portals, and more</p>		<p><b>Non-SSA Workload Support:</b> Any number of processes</p> <p><b>Continually Configurable:</b> Adaptive to changing state mandates and requirements</p> <p><b>Seamless Modernization:</b> A gradual, step-over technology update process</p> <p><b>Secure:</b> Federally accredited hosting, on-premises or in the cloud</p>	
LOW RISK		LOW COST	
<p><b>Assured:</b> One vendor with decades of DCPS expertise</p> <p><b>Consistent:</b> Maintains all DCM functionality and unique DDS requirements</p> <p><b>Collaborative:</b> Iterative, agile development paced to SSA and DDS preferences</p> <p><b>Incremental:</b> Smooth step-over approach – no operational disruptions</p>		<p><b>Zero Ramp-up:</b> Decades of experience from day one</p> <p><b>No Double Charges:</b> Modern COTS core is a software upgrade – not a second system</p> <p><b>Low Fixed Pricing:</b> Clear pricing for unique DDS configurations, implementations and training</p> <p><b>Affordable Maintenance:</b> Open architecture, open standards, configuration based solution</p>	

FOCUS

Commercial Software for the Public Sector



98%  
OF

U.S. STATES  
UTILIZE MICROPACT  
SOFTWARE

97%  
OF

FEDERAL AGENCIES\*  
UTILIZE MICROPACT  
SOFTWARE

“

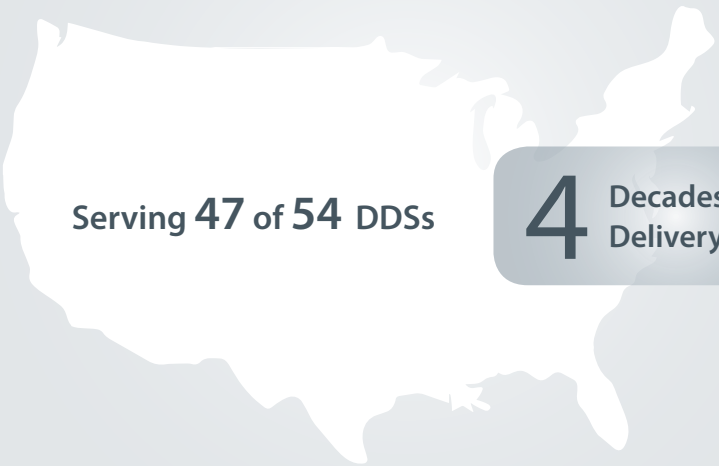
...proactively changing the rules of engagement.

”

Gartner

DEDICATION

Decades of Experience Packed in MicroPact DCM Code




Serving 47 of 54 DDSs

4

Decades of  
Delivery

TECHNOLOGY

Powering Many of the Nation's Largest Programs




“

This product [entellitrak] is purpose-built to  
address the complexity of case handling.

”

Gartner



A Clear and Simple Path to a Modern Disability Case Management System

4

Transition Team Member Document--Non-Public Information. This document may be disclosed to Authorized Transition Team Members only.



# Why is an entellitrak COTS Core the Ideal Modernization Path for the SSA and DDSs?



Configurability



Scalability



Timeliness



Affordability



## Navy Justice Information System (NJIS)

The development and deployment of a single, integrated, worldwide, case management system for the entire lifecycle of all Navy justice casework.



## Justice Security Tracking and Adjudication Record System (JSTARS)

The agency's first organization-wide system of record. Maintains and tracks background investigations, re-investigations, and security clearances for DOJ and its component agencies.

MAXIMUS

## State of California Workers' Compensation Independent Billing Review and Medical Review Systems

The first system to track and manage all independent medical and billing reviews for all California Workers' Compensation claims.



**5** GLOBAL COMMUNITIES

- 1 Law Enforcement
- 2 Investigations
- 3 Command
- 4 JAG
- 5 Corrections



**11** GLOBAL DOD SYSTEMS

**4** Replaced and Consolidated  
**7** Interfaces



**1** INVESTIGATIVE CASE OBJECT

ACROSS **20** DOJ COMPONENTS

Adaptive to the independent process and data requirements of each



**3** MASSIVE SYSTEMS

- Medical Documents
- Physician Gateway
- Case Management

**1** ENTELLITRAK INTERFACE



**400,000** CASES PER YEAR

**800** LETTERS PER DAY



**50%**



**40%**

Cost and Time Savings Over  
**\$25M, 41 MONTH**  
FAILED MODERNIZATION ATTEMPT



**1<sup>ST</sup>** DOJ-WIDE SYSTEM OF RECORD



### AN INCREMENTAL STEP-OVER

- Component #1: 8 months (4 ahead of schedule)
- Component #2-6: 12 months
- Remainder: as each was ready



**\$27M** SAVINGS IN 18 MONTHS



**83%** FASTER DEVELOPMENT than custom coding



**15-30%** GREATER EFFICIENCY Distributed processing

California – Case Initiation  
New York, Ohio – Case Review and Resolution

**Corporate Headquarters**

12901 Worldgate Drive, Suite 800  
Herndon, VA 20170

**Contact Us**

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Direct: 703 709 6110  
sales@micropact.com

[www.micropact.com](http://www.micropact.com)



**Information about cost increases from Micro Pact  
December 16, 2016**

As you can see, there were increases from over 200 to over 500% in one year. A list of those states by year is included below:

**Legacy Cost Increases by Micro Pact**

<b>2014</b>	
North Carolina	204.0%
Montana	203.2%
North Dakota	234.9%
South Dakota	205.6%
California	241.3%
Hawaii	344.6%
<b>2015</b>	
Maine	229.9%
New Hampshire	213.5%
Puerto Rico	212.7%
West Virginia	228.6%
Wisconsin	217.2%
Utah	225.0%
Wyoming	229.4%
Nevada	548.1%

**Transition Team Member Document – Non-Public Information This document may only be disclosed  
to authorized Transition Team members**



**SSA GENERAL COMMITTEE**  
**AMERICAN FEDERATION OF GOVERNMENT EMPLOYEES, AFL-CIO**

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*Representing over 50,000 SSA employees across the nation, Puerto Rico and Pacific Islands*

PO Box 617576  
Chicago IL 60661-7576  
(312) 575-5620  
(312) 575-5625 Fax

**MEMORANDUM**

**DATE:** July 30, 2001

**TO:** Vince Sabatino

**FROM:** Witold Skwierczynski  
Co-Chair NPC &  
General Committee Designee

**SUBJECT:** DCM Draft Evaluation Report Comments

In November 1995 SSA and AFGE negotiated an agreement regarding the establishment of the DCM. The agreement provided that overall implementation of the plan for disability redesign is a joint labor-management initiative. Unfortunately SSA has refused to meet with the union to discuss the draft report. Throughout the redesign process SSA has always met with the union to discuss mutual concerns regarding redesign issues. The union requested three meetings with SSA to discuss the draft report, discuss the final report and meet with the Commissioner to present the results of the "joint labor-management initiative". Management has refused to schedule any meetings. This violates the spirit of the November 1995 agreement.

The parties agreed to substantive evaluation requirements:

1. Effects on Service to the Public
2. Effects on Employees
3. Program and Administrative Cost Impact
4. Program Accuracy and Timeliness Impact
5. The effect on the Efficiency of the Disability Process

Unfortunately, the Draft report indicates that the only scientific and statistically valid elements that were assessed were public service or customer satisfaction, employee satisfaction, processing time and accuracy. In all these categories the DCM pilot shows that the DCM is a success story. The Draft report authors, despite the protests of DPRT staff, attempt to minimize and denigrate the accomplishments of the DCM in these categories. The results, however, speak for themselves.

Processing time is 6 days (T-XVI) to 10 days (T-II) better for DCM cases than control cases. That means that the DCM processes cases significantly faster than the current process. In fact, average processing time was only 67 days for both T-II and T-XVI cases. According to SSA's FY 2002 Performance Plan, SSA's processing time goal for initial disability cases in FY 2002 is 120 days. That goal equals the FY 2001 target. The DCM beat this goal by 53 days! That's called incredibly better performance than SSA expectations. SSA officials should be jumping out of their shorts to try to figure out how to take advantage of this excellent DCM processing time rather than to attribute the superior performance to DDS "resources constraints" and control of leads issues. No mention was made in your analysis that DCM's were discouraged from taking unnecessary technical denial cases which are 0 day processing time cases. In the real SSA world these cases are encouraged if not required. These cases drive down overall processing time. Despite this competitive handicap, DCM's still outperformed the control group and SSA overall. When a new pilot program results in 44% better processing time than expectations without resorting to statistically manipulative procedures (i.e., technical denials), management should be working on political and logistical strategies for expanding this remarkable success story to the entire country.

Customer satisfaction surveys conducted by Office of Quality Assurance (OQA) indicate that the public prefers DCM's to customers of the current CR-DE bifurcated product. Customers prefer the single decision maker to the current pass the buck explanations of responsibility. In the DCM Draft Evaluation report, you assert that claimant satisfaction for DCM's exceeds the current process only for denied claimants. What reports were you reading? In virtually every question, customers categorized DCM's as Excellent and Very Good to a significantly greater degree than customers rated the current process. This is true for both claimants awarded benefits and claimants denied benefits. In fact, awarded disability claimants rated the DCM higher in percentage of Excellent and Very Good ratings in every single question where this choice was provided. Yet your summary states that the survey results were comparable for those who were



awarded benefits. By not stating this fact the report is shows bias against the DCM. TELL THE TRUTH.

Employee satisfaction was significantly higher for DCM's than employees who work under the current process. The satisfaction rate was eighty three percent higher in Phase 2 for DCM's in comparison to their job as CR/DE. The executive summary should categorize this as overwhelmingly greater employee satisfaction. That would be an accurate portrayal of this huge satisfaction increase. SSA failed to measure CSS job satisfaction in violation of the DCM MOU. Gratuitous remarks by biased OWA authors in Appendix VI should be stricken from the report. The remarks contained in "Caveats" and "Reactions/Conclusions" are gratuitous and not in conformance with the MOU requirements to conduct a valid employee satisfaction survey. The analysis of the narrative comments is unscientific and not valid and, therefore, violates the MOU. Strike these remarks. It is actually remarkable that there was such a high level of DCM satisfaction in view of SSA's abysmal performance on keeping DCM's informed of their fate and the fate of the DCM pilot. Also, continuing adverse remarks by high-level Agency officials about the DCM pilot still did not reduce employee satisfaction levels. In an environment where SSA must compete for workers, you appear to have stumbled on a job whose workers are uniformly satisfied with their work. This is noteworthy and deserves emphasis.

The report states that DCM statistical accuracy for disability allowances and denials was comparable to the control group. The report, however, states that DCM technical accuracy for disability allowances was significantly higher than the current process (eight.3% higher). Also, the dollar accuracy of T-II DCM cases is reported to be significantly higher than the current process. Thus, the DCM accuracy, in some respects, exceeds the current process. This isn't even mentioned in the Executive Summary despite the fact that it is one of the key evaluative elements addressed in the DCM MOU.

Thus, in categories that were measured accurately, the DCM is an overwhelming success story. The success is so dramatic, that we should be organizing parades down Security Boulevard celebrating the DCM success story. The Weasels should play and the SSA Choir should sing an ode to the DCM.

However, in the key issues of cost and productivity, the report attempts to skewer the DCM. Unfortunately, your statistics are cooked and your findings are fiction. Also, the productivity data is not valid and, therefore, violates the DCM MOU.

Section V (A) of the MOU states as follows:

In order to ensure the effectiveness of the DCM pilots, valid evaluations will be performed to assess a variety of issues including the quality of the work product, the impact of the pilot activity on employees, productivity and for continuation or expansion.

Section V (B) of the DCM MOU states as follows:

Pilot evaluation to assess productivity, processing time, and employee impact issues will be performed by the Office of Workforce Analysis.

On June eighth, 2001 I wrote a letter to Acting Commissioner Massanari objecting to SSA's productivity and cost analysis of the DCM pilot (see Enclosure 1 and its attached letter of April eighteenth regarding the DCM Shutdown). In this letter I object to specific SSA use of productivity measures that are only valid at the national level such as WUPWY, PPWY, OWA baseline Study and the CEMS. Using statistical measures that are only valid at the national level to evaluate productivity of an individual site violates the validity requirement of the MOU. I would like to incorporate all objections to SSA's methodology for determining cost and productivity that were delineated in the aforementioned letter to Mr. Massanari to these comments.

Unfortunately the June 29, 2001 response by Ms. Roecker does not substantively address any of my objections. Instead, Ms. Roecker asserts that since the union had appointed a full time DCM DPRT member that somehow allows SSA to violate the DCM MOU. I don't think so. She states that the Agency is apparently exonerated for their MOU violations due to the fact that they had AFGE input throughout Phase II. Part of this input included objections at NPC meetings to the Agency's refusal to seek professional third party independent evaluation of the DCM pilot i.e., Lewin. Unfortunately SSA decided to do an in house evaluation of the DCM. SSA used inexperienced amateurs in evaluate this important project. SSA used no professional statisticians. It shows. SSA didn't even use OWA as required by V (B) of the MOU. Why? OWA would have likely rejected measures only valid at the national level to measure local performance.

SSA's cost and productivity analysis doesn't meet fundamental requirements of accuracy and validity. Assumptions are made where facts are needed. Why didn't SSA conduct a time study to determine how much time each employee spent on each segment of DCM work? Why wasn't this compared to a control group and to the current process?



Why doesn't the Evaluation Report state that the number of Claims Support Specialists (CSSs) was not designed to be reflective of actual support needs but rather was a negotiated compromise to the DDS refusal to initiate a 750 DCM pilot as envisioned by the DCM MOU. The report should also mention that the key factor in DCM allocation to specific sites was space availability rather than program needs. Although the Executive Summary acknowledges the added cost of an excessive managerial ratio, no effort is made to estimate the cost of using a standard managerial to employee ratio. Although the report states that site coordinators and DCM's recommend substituting CSSs with clerical support, no effort is made to analyze the difference this would make in cost and productivity. Although the MOU requires an assessment of any needs for clerical and technical support, this was not done. (Simply quoting comments made by DCM's and site coordinators is not an assessment. Oh, and why didn't anyone talk to the CSSs and solicit their opinions regarding this issue?)

The report assumes State costs for personnel now and in the future without any current time studies to determine the time that state personnel spent on DCM activities. Projections of future costs were done without any assessment of State labor agreements, inflationary projections, or any review of state personnel rules.

Gratuitous statements are made in the Report about training costs without any analysis of the current cost for training CRs and DEs and comparing it to future costs using similar training methodologies.

The report should include alternative cost analysis of the DCM cost without CSS technical support and with reduced managerial ratios. Unfortunately the findings of such an analysis would suffer from the same criticism of the report's invalid cost and productivity findings.

The worst abuse is the attempt to saddle the DCM with higher program costs by asserting that significantly more DCM claimants filed for Reconsideration and the cumulative allowance rate for DCMs was statistically significant. This finding is completely irresponsible, violates the MOU and is a blatant attempt to portray the DCM pilot as more costly program wise. Such an impression is completely false. The Agency admits in the Summary that allowance rate projections are premature until sufficient case volumes are processed to final appeal. Even the Reconsideration data is incomplete since many Reconsideration cases are still pending. Referencing these invalid statistics violates the DCM MOU.

The reference to Prototypes constitutes more selective data. The Executive Summary compares DCM performance to control group performance in prototype

states. It concludes that there were no marked differences in accuracy, processing time and initial allowance rates. Perhaps the report should compare the strikingly superior customer satisfaction for the DCM as compared to the Prototype. This data shows the following:

**Customer Service Comparison – DCM/Prototype  
(Excellent/Very Good Responses)**

<b>Question</b>	<b>DCM</b>	<b>Prototype</b>
Adjudicator Explained Rules/Requirements – claim allowed	74%	46%
Adjudicator Explained Rules/Requirements – claim denied	41%	27-35%
Adjudicator Caring/Helpful – claim allowed	87%	59%
Adjudicator Caring/Helpful - claim denied	60%	38%
Adjudicator Courteous/Respectful - claim allowed	87%	67%
Adjudicator Courteous/Respectful - claim denied	65%	53%
Adjudicator Job Knowledge – claim allowed	85%	64%
Adjudicator Job Knowledge - claim denied	64%	42-60%
Amount of Time Spent with Claimant – claim allowed	78%	58%
Amount of Time Spent with Claimant - claim denied	49%	33%
How Long it Took to handle application – claim allowed	58%	40%
How Long it Took to handle application - claim denied	23%	18%
Clear Notice With Reason – claim allowed	69%	41%
Clear Notice With Reason - claim denied	21%	20%
Overall Service – claim allowed	79%	47%
Overall Service - claim denied	25%	25%

Wouldn't an accurate analysis of the DCM in comparison to Prototypes include the finding that the public prefers the DCM to a substantial degree?

Another problem with SSA's assessment of productivity and cost is the inclusion of backfilled DCMs in the statistical data. This was done despite an agreement at an NPC meeting that backfilled DCM performance would not be used in the DCM evaluation process. Unfortunately SSA has violated this commitment. Thus, all productivity data is of questionable value.

In conclusion, the valid measurements addressed in the DCM pilot Draft Evaluation Report show the DCM to exceed or match control groups and the



current process. Invalid measures such as productivity and cost should be excluded from the report due to their questionable accuracy and value. The bottom line is that the DCM is a success.

The report fails to take the next step and recommend the role of DCM in the future. The attempt to assess environmental fit falls short of being a useful tool to address the future need for a single disability decision maker in SSA field offices. The report should conclude that since the customers appear to want DCM service, SSA ought to provide it. All valid measures show that the DCM pilot experience matches or exceeds current service levels, often to a substantial degree. If there are barriers to roll out or further study, the report should propose methodologies to overcome those barriers.

If legislative change is necessary to permit SSA workers to make disability decisions, the report should recommend that the Commissioner propose such legislation. If lobbying and jawboning the States to accept SSA disability decision-making is a potential roll out strategy, such a proposal should be offered for the Commissioner's consideration. If further piloting is necessary to assess cost and productivity in a valid manner, the report should contain proposals for such further piloting.

It's the union's view that the DCM is a success story and needs a joint union management devised roll out strategy. Such a multifaceted approach would include further study of cost and productivity, legislative strategy to expand disability decision making to SSA workers, and adding states and facilities to the DCM environment in a reasonable roll out strategy. All roll out initiatives should contain the ability for the parties to continue to review the DCM experience and adjust mutual goals and targets if necessary.

Such a strategy should be the focus of the Evaluation Report. It needs to be rewritten to reflect the positive successes of the DCM pilot. Speculation, guesswork and invalid data should be discarded. The prior DPRT team should be reassembled to write an accurate report. It would be a shame if this successful pilot were shelved due to SSA's reluctance to stand up for what is needed- better customer service. Let's restore SSA to the status of a model Agency. The American public deserves it.





**National Council of SSA Field Operations Locals  
AMERICAN FEDERATION OF GOVERNMENT EMPLOYEES, AFL-CIO**

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*Representing Over 28,000 Social Security Employees Working In Over 1,300 Field  
Installations and 36 Teleservice Centers Across the Nation,  
Puerto Rico and Pacific Islands  
Witold Skwierzynski, President*

**Disability Claims Manager (DCM) -- Was it a Success or Failure?**

Acting Commissioner Larry G. Massanari announced on October 22, 2001 "after much consideration, I have decided the Agency should not pursue further testing or implementation of the DCM position". This decision, announced early on a Monday morning, followed the release of the Final DCM Evaluation Report on October 19, 2001.

This decision was foreseeable in January 1999, when Sue Roecker, now Acting Director of the Office of Strategic Management, stated that the DCM is "better government than we can afford". This comment was made despite the fact that the Phase 1 pilot results indicated that the DCM was a screaming success. In the ensuing months, proponents of DCM were shut out of the evaluation process, and AFGE was dismissed from the DCM team at the first draft of the final evaluation on June 29, 2001. Acting Commissioner Massanari refused to meet with the Union regarding the draft results before the final evaluation, despite the Union's involvement in the DCM project since its inception. SSA management also denied Union requests for copies of comments by stakeholders regarding the draft report. The result was that the evaluation was written in secret with no oversight. Finally, the DCM report was issued without a validated measure of productivity or cost despite SSA's signed agreement that only valid results would be considered in the DCM Evaluation.

**What is "Better Government Than We Can Afford"?**

The DCM Evaluation did not attempt to measure the qualitative improvement in the life of a seriously and even terminally ill applicant who received compassionate and knowledgeable service and a speedy decision from a DCM. The evaluation cannot hide the fact that service to the public was greatly improved during the DCM process, because decisions were comparably accurate and made measurably faster than in the current process. In heavily impacted states, the DCMs made decisions 2-4 months faster! The FY 2000 processing time goal for initial disability claims is 120 days. The DCM overall processing time was 67 days. This stellar performance is exactly the answer to public and Congressional demands to streamline the disability process.

Acting Commissioner Massanari stated, "Test results were mixed". The DCM results are exactly the right mix! The public was highly satisfied, and even denied claimants cited superior customer service in every surveyed category. Eighty-seven percent (87%) of the DCMs reported higher job satisfaction than being limited to their former Claims Representative or Disability Examiner duties.

The real reason for SSA's rejection of the DCM is pressure exerted by the National Council of State DDS Directors (NCDDD), which is opposed to this proven customer-friendly initiative. It is evident that the DCM pilot was terminated for political reasons rather than on meritorious grounds. SSA is unwilling to support good government if it disrupts the status quo.



In October 1999, SSA rolled out a Prototype process in ten states without preliminary testing. States involved in this initiative eliminated the Reconsideration step of a denied disability claim and substituted a claimant conference. Without measures of the productivity and administrative cost of the Prototype, SSA is forging ahead. Projected cost savings have not been achieved by SSA. Why is this project continuing despite lackluster results?

An analysis prepared by AFGE comparing the customer service surveys of DCM vs. Prototype reveals much higher customer service ratings in all categories by the DCMs.

### **Where Do We Go From Here?**

The underlying problems in the disability program, which led to the testing of a DCM solution, have not diminished, but are worsening year after year. Both the U. S. Congress and the Social Security Advisory Board (SSAB) have advised SSA that over the past decade that the disability program is a train wreck waiting to happen. The SSAB less than a year ago noted, "long-standing problems are growing more acute and new ones are emerging" in serving disabled Americans. About two thirds of the SSA budget, nearly \$5 billion, was spent on disability work in 2001. As baby boomers age, the economy worsens and unemployment rises, the growth in disability claims will accelerate.

Many states are overwhelmed with the current volume of disability work, which will only increase. It is predictable that more and more states will require the assistance of trained field office employees in handling medical portions of the disability workload to adequately serve the American public.

There is a vital role for SSA field office employees trained in making disability determinations in our community based field offices. This will result in an improvement in public service; faster disability decisions and a streamlined process. SSA has been hypocritical by promoting a Service Vision empowering employees, while insisting that an improved medical form (3368) is all that is required. SSA is paying lip service to the substantive successes of the DCM by relegating future development to "local and regional service improvement initiatives." When will SSA pay their field office employees commensurate with their talent and performance? The DCM is a GS 12 position offering an opportunity for SSA field office employees to add value to the disability program.

The real tragedy is the failure of SSA management to acknowledge the talents of field operations employees who showed that they could provide one stop disability customer service. The DCMs provided vastly improved customer service, faster, with comparable accuracy and productivity. Another tragedy is SSA's failure to provide the one stop disability service that the public demands. SSA's rejection of the DCM is a decision to provide the public with substandard disability service.

Perhaps newly confirmed Commissioner Barnhart will have a different attitude regarding better disability customer service. Perhaps Congress and the American public will demand a DCM roll out. The Union will continue to work to achieve this disability process and higher graded jobs for field operations workers.

**Final Rule:**  
**"Revisions to Rules Regarding the Evaluation of Medical Evidence"**

Summary of the Treating Source Rule:

- Since 1991, the treating source (physician) rule required adjudicators to give controlling weight, under certain circumstances, to a treating source's medical opinion about how a claimant's impairment affects his or her physical or mental abilities. The treating source rule reflected healthcare practice of the era—in other words, medical care provided by one physician over a lengthy period.

Reasons to Revise the Treating Source Rule:

- Since we implemented the treating source rule, healthcare delivery has changed substantially. Many individuals now receive health care from multiple medical sources, such as from coordinated and managed care organizations, instead of from one treating source.
- The complexity of the current treating source rule, including the articulation requirements associated with the rule, has caused the rule to be one of the most common causes of Federal court remands in our disability litigation cases. Moreover, while courts in most circuits typically remand claims to us for further adjudication when they find we erred in our evaluation of treating source opinions, the Ninth Circuit uses a "credit-as-true" rule, which sometimes results in it ordering us to award benefits instead of remanding cases. Application of the credit-as-true rule prevents us from reconsidering the evidence in the record as a whole and correcting any errors that may exist, effectively supplanting the judgment of our decision makers.
- There has been some Congressional concern that the treating source rule can be abused to bind adjudicators in how they view a claimant's medical conditions. In particular, Senator James Lankford has expressed concern that attorneys and other professional advocates manipulate the treating source rule to obtain benefits for claimants who are not truly disabled. He has requested that SSA revise the treating source rule to allow ALJs to consider all relevant medical opinions.

Summary of the Final Rule:

- The final rule would eliminate requiring our adjudicators to give controlling weight to treating source opinions. The final rule would replace our current treating source opinion rule with a policy that reflects modern healthcare delivery, emphasizes the record as a whole, and values the factors of consistency and supportability over the status of the medical source.
- The final rule also would expand the list of "acceptable medical sources." Under the final rule, acceptable medical sources would include licensed advanced practice registered nurses, licensed audiologists, and physician assistants. These sources are used

to establish or verify the existence of a medical impairment. (Adjudicators, however, must weigh whether the impairment(s) is disabling.)

#### Advantages of the Final Rule:

- The final rule reflects changes in the national healthcare workforce (as well as how individuals currently receive primary medical care), and ensures that we continue to make accurate and consistent determinations and decisions.
- The final rule maintains our focus on policy that supports modern healthcare delivery and continues our practice of consistent, timely, and evidence-based decisionmaking.
- The final rule would provide trust fund and administrative cost savings. We estimate that the final rule will save roughly \$630 million in program benefits and \$295 million in administrative costs over a 10-year period (fiscal years 2017 to 2026).

#### Congressional Response to the Treating Source Rule:

- During the passage of the *Bipartisan Budget Act of 2015*, Senator Lankford introduced an amendment to that bill that, while rejected by the Senate, would have made significant changes to the disability programs. The proposed changes would have eliminated *controlling* weight for treating source opinions (but treating sources could still receive *greater* weight than non-treating sources). In this respect, Senator Lankford's proposed amendment was similar to the changes in this final rule.
- During the comment period for the NPRM, we received a letter from the ranking members of our authorizing full committees (and their relevant subcommittees) and appropriating subcommittees that asked us to withdraw the proposed changes to the way we consider opinion evidence provided by claimants' treating sources. The ranking members recommended that we focus on increased training and compliance with existing policy, and add clarifications where necessary, rather than abandon the policy itself.

**Transition Team Member Document--Non-Public Information. This document may be disclosed to Authorized Transition Team Members only**

Vendor	Description of Requirement	Action Obligation	Base and All Options Value	Fiscal Year	Date Signed	PO/Delivery Order/Task Order or Call#	Mod #	Parent Contract #
INTERNATIONAL BUSINESS MACHINES CORPORATION	MAINFRAME HARDWARE, CAPACITY UPGRADES AND ASSOCIATED SUPPLIES.	\$300,000.00	\$810,000,000.00	2016	06/17/2016	SS001660010	0	
FOUR	RE-COMPETE ONGOING SOFTWARE MAINTENANCE SUPPORT, AND A VEHICLE FOR ACQUIRING ADDITIONAL VERSION UPGRADES FOR IBM SOFTWARE.	\$60,820,000.00	\$312,904,960.00	2015	12/16/2014	SS001530081	0	GS35F0312U
SECURITYHUNTER, INC.	PHYSICAL SECURITY SYSTEM STANDARDIZATION AND SUPPORT SERVICES (PSS) NEW BLANKET PURCHASE AGREEMENT. FPDS FUNCTION CODE: IGF::OT::IGF	\$0.00	\$211,000,000.00	2015	09/18/2015	SS001540027	0	GS07F0029M
DELL MARKETING L.P.	MICROSOFT BPA	\$0.00	\$140,000,000.00	2017	10/21/2016	SS001740002	0	GS35F059DA
INTERNATIONAL BUSINESS MACHINE	IGF::OT::IGF: MODIFICATION TO CHANGE ALTERNATE CONTRACTING OFFICER'S REPRESENTATIVE (ALT COR)	\$0.00	\$137,687,000.00	2016	05/25/2016	SS001240045	8	GS35F4984H
LOCKHEED MARTIN CORPORATION	IGF::CL::IGF - TASK ORDER 17 AGAINST INFORMATION TECHNOLOGY SUPPORT SERVICES CONTRACT NUMBER SS00-10-60108, WITH LOCKHEED MARTIN FOR CONTRACTOR SUPPORT. THIS ACTION WILL FUND TECHNICAL AREA 2, "APPLICATION DESIGN, DEVELOPMENT, TESTING, AND MAINTENANCE" AND 4, "DATABASE ADMINISTRATION AND IMAGING AND DOCUMENT MANAGEMENT" TIME&MATERIALS SUBTASKS FROM 09/29/16-09/28/17.	\$100,169,036.69	\$100,169,036.69	2016	09/28/2016	0017	0	SS001060108
NORTHROP GRUMMAN SYSTEMS CORPORATION	IGF::CL::IGTIME AND MATERIALS (T&M) TASK ORDER AGAINST THE INFORMATION TECHNOLOGY SUPPORT SERVICES CONTRACT (ITSSC), CONTRACT NUMBER SS00-10-60082, WITH NORTHROP GRUMMAN, FOR CONTRACTOR SUPPORT WITH TASKS RELATED TO TECHNICAL AREA 1 (APPLICATION AND BUSINESS PLANNING, ANALYSIS AND REQUIREMENTS), TECHNICAL AREA 5 (DATA ADMINISTRATION, PROGRAMMATIC REPOSITORY, AND ENTERPRISE ARCHITECTURE), AND TECHNICAL AREA 8 (SOFTWARE ENGINEERING MANAGEMENT).	\$99,598,228.84	\$99,598,228.84	2016	09/28/2016	0031	0	SS001060082
LOCKHEED MARTIN CORPORATION	IGF::CL::IGF - TASK ORDER 12 AGAINST INFORMATION TECHNOLOGY SUPPORT SERVICES CONTRACT NUMBER SS00-10-60108, WITH LOCKHEED MARTIN FOR CONTRACTOR SUPPORT. THIS ACTION WILL FUND TECHNICAL AREA 2, "APPLICATION DESIGN, DEVELOPMENT, TESTING, AND MAINTENANCE" AND 4, "DATABASE ADMINISTRATION AND IMAGING AND DOCUMENT MANAGEMENT" TIME&MATERIALS SUBTASKS FROM 09/29/15-09/28/16.	\$99,367,423.18	\$99,367,423.18	2015	09/25/2015	0012	0	SS001060108
NORTHROP GRUMMAN SYSTEMS CORPORATION	IGF::CL::IGF  TIME AND MATERIALS (T&M) TASK ORDER 0026 AGAINST THE INFORMATION TECHNOLOGY SUPPORT SERVICES CONTRACT (ITSSC), CONTRACT NUMBER SS00-10-60082, WITH NORTHROP GRUMMAN, FOR CONTRACTOR SUPPORT WITH TASKS RELATED TO TECHNICAL AREA 1 (APPLICATION AND BUSINESS PLANNING, ANALYSIS AND REQUIREMENTS), TECHNICAL AREA 5 (DATA ADMINISTRATION, PROGRAMMATIC REPOSITORY, AND ENTERPRISE ARCHITECTURE), AND TECHNICAL AREA 8 (SOFTWARE ENGINEERING MANAGEMENT). THE PURPOSE OF MOD 10 TO BPA SS00-14-40017 CALL 4 IS TO DE-OBLIGATE THE REMAINING	\$94,089,718.92	\$94,089,718.92	2015	09/25/2015	0026	0	SS001060082
NCS TECHNOLOGIES, INC.	INSTALLATION FUNDS.	-\$234,930.12	\$90,688,488.74	2016	07/11/2016	0004	10	SS001440017
RED RIVER COMPUTER CO., INC.	CISCO HARDWARE, SOFTWARE,&MAINTENANCE REQUIREMENTS CONTRACT	\$0.00	\$72,151,000.00	2015	04/27/2015	SS001560019	0	

MAXIMUS FEDERAL SERVICES, INC.	IGF::CT::IGF - COMBINED RECOMPETE OF SS00-10-60103 FOR BENEFICIARY ACCESS&SUPPORT SERVICES (BASS) AND SS00-10-60102 FOR OPERATIONS SUPPORT MANAGER (OSM) FOR OPERATIONAL SUPPORT OF THE TICKET TO WORK PROGRAM.	\$16,385,736.00	\$69,434,571.00	2015	09/24/2015	SS001560057	0	
WESTAT, INC.	EARLY INTERVENTION MENTAL HEALTH- DEMONSTRATION STUDY IGF::OT::IGF IGF::OT::IGF OTHER FUNCTIONS	\$63,918,323.00	\$63,918,323.00	2016	08/25/2016	SS001660014	0	
ACCUITY INC.	NEW FIVE-YEAR (BASE 12-MONTHS; 4 12-MONTH OPTIONS, AND OPTION FOR UP TO 6-MONTHS PER FAR 52.217-8) CONTRACT FOR CONTRACTOR TO SUPPORT THE ACCESS TO FINANCIAL INSTITUTIONS (AFI) FOR SUPPLEMENTAL SECURITY INCOME (SSI) PROGRAM APPLICANTS, RECIPIENTS, AND DEEMORS. CONTRACT WILL ALLOW SSA TO VERIFY ACCOUNTS, ACCOUNT BALANCES, AND INTEREST INCOME FOR APPLICANTS, RECIPIENTS, AND/OR DEEMORS.	\$5,474,344.00	\$51,002,023.00	2015	01/21/2015	SS001560007	0	
FOUR	TO INCORPORATE AN UNLIMITED ENTERPRISE LICENSE (UEL) FOR THE INTERNATIONAL PROGRAM LICENSE AGREEMENT (IPLA) MAINFRAME SOFTWARE.	\$17,442,485.10	\$50,842,485.10	2015	03/31/2015	SS001530081	4	GS35F0312U
NORTHROP GRUMMAN SYSTEMS CORPORATION	IGF::OT::IGF: NETWORK INFRASTRUCTURE SUPPORT SERVICES: THE SOCIAL SECURITY ADMINISTRATION HEREBY ESTABLISHES THIS BPA FOR A CONTRACTOR TO PROVIDE ALL NECESSARY PERSONNEL, MATERIALS, SERVICES, ANCILLARY SUPPLIES, SOFTWARE AND EQUIPMENT, IN SUPPORT OF SSA'S NETWORK INFRASTRUCTURE.	\$0.00	\$50,000,000.00	2016	07/22/2016	SS001640009	0	GS35F0165Y
ACS FEDERAL SOLUTIONS LLC	IGF::OT::IGF - NATIONAL SCANNING SERVICES BLANKET PURCHASE AGREEMENT IGF::CL::IGF	\$0.00	\$49,461,783.93	2015	03/17/2015	SS001540019	0	GS03F0015V
COMPUTER SCIENCES CORPORATION	TASK ORDER 9 AGAINST INFORMATION TECHNOLOGY SUPPORT SERVICES CONTRACT (ITSSC), CONTRACT NUMBER SS00-10-60107, WITH COMPUTER SCIENCES CORPORATION FOR CONTRACTOR SUPPORT. THIS ACTION WILL FUND VARIOUS SUBTASKS UNDER TECHNICAL AREAS 3, 6, AND 9.	\$48,663,052.74	\$48,663,052.74	2015	09/28/2015	0009	0	SS001060107
NCS TECHNOLOGIES, INC.	CONVERT SITES TO SDS AND WILL PROVIDE SDS BUNDLES TO NEW HIRES AT SDS PHASE 1 LOCATIONS. OVERALL, THIS REQUISITION WILL PROVIDE AN ADDITIONAL 18,535 LAPTOPS AND 26,731 DOCKING STATION BUNDLES.	\$48,385,501.05	\$48,385,501.05	2015	09/30/2015	0013	0	SS001440017
CSC GOVERNMENT SOLUTIONS LLC	IGF::CL::IGF - TASK ORDER 12 AGAINST INFORMATION TECHNOLOGY SUPPORT SERVICES CONTRACT NUMBER SS00-10-60107, WITH CSRA FOR CONTRACTOR SUPPORT. THIS ACTION WILL FUND TECHNICAL AREA 3, "APPLICATION VALIDATION", 6, "SOFTWARE ENGINEERING AND TECHNOLOGY", AND 9, "SOFTWARE ADMINISTRATION FOR Z/OS, UNIX, WINDOWS, AND WEBSPPHERE" TIME&MATERIALS SUBTASKS FROM 09/29/16-09/28/17.	\$46,606,655.24	\$46,606,655.24	2016	09/28/2016	0012	0	SS001060107
ACCENTURE NATIONAL SECURITY SERVICES LIMITED LIABILITY COMPANY	IGF::OT::IGF THE PURPOSE OF THIS AWARD IS TO ESTABLISH A BPA FOR CLOUD COMPUTING SERVICES.	\$0.00	\$46,000,000.00	2016	09/26/2016	SS001640037	0	GS35F0371N
CSRA LLC	IGF::OT::IGF THE PURPOSE OF THIS AWARD IS TO ESTABLISH A BPA FOR CLOUD COMPUTING SERVICES.	\$0.00	\$46,000,000.00	2016	09/26/2016	SS001640039	0	GS35F393CA
JASPER SOLUTIONS INC	IGF::OT::IGF THE PURPOSE OF THIS AWARD IS TO ESTABLISH A BPA FOR CLOUD COMPUTING SERVICES.	\$0.00	\$46,000,000.00	2016	09/26/2016	SS001640038	0	GS35F0605W
GLOBAL RESOURCE SOLUTIONS, INC.	IGF::OT::IGF NATIONWIDE SECURITY ESCORT BLANKET PURCHASE AGREEMENT	\$0.00	\$37,397,268.00	2016	04/18/2016	SS001640019	0	GS07F0071X
DELL MARKETING LIMITED PARTNERSHIP	EXERCISE OPTION YEAR 2 - BPA CALL ORDER FOR MICROSOFT SOFTWARE ASSURANCE, PREMIER SUPPORT, AND SQL SERVER LICENSE CONVERSION AND SYSTEMS CENTER DATA CENTER STEP-UP.	\$31,003,106.12	\$31,003,106.12	2016	10/13/2015	0021	0	SS001441005

DELL MARKETING L.P.	MICROSOFT SOFTWARE ASSURANCE	\$28,880,561.73	\$28,880,561.73 2017	10/21/2016	0001	0	SS001740002
	IGF::CL::IGF FIRM-FIXED PRICE (FFP) TASK ORDER 15 AGAINST THE INFORMATION TECHNOLOGY SUPPORT SERVICES CONTRACT (ITSSC), CONTRACT NUMBER SS00-10-60113, WITH ACCENTURE FEDERAL SERVICES, FOR CONTRACTOR SUPPORT WITH TECHNICAL AREA 7 (EMERGING TECHNOLOGY APPLICATIONS). THIS TASK ORDER WILL SUPPORT 2 SUBTASKS, ONE FOR MAINFRAME PERFORMANCE AND CAPACITY ASSESSMENT, AND THE OTHER FOR CTO (CHIEF TECHNOLOGY OFFICER) CLOUD INITIATIVES.						
ACCENTURE NATIONAL SECURITY SERVICES, LLC		\$28,811,804.81	\$28,811,804.81 2015	09/28/2015	0015	0	SS001060113
	NTDC IGF::OT::IGF THIS IS A REQUIREMENTS CONTRACT FOR TRAINING, TECHNICAL ASSISTANCE AND DATA COLLECTION AND ANALYSIS TO SUPPORT THE WORK INCENTIVE PLANNING AND ASSISTANCE (WIPA) PROGRAM. THE WORK IS TO BE PERFORMED VIA TASK ORDERS IN ACCORDANCE WITH THE ATTACHED STATEMENT OF WORK AND TERMS AND CONDITIONS OF THIS CONTRACT. THE ANTICIPATED TOTAL PERIOD OF PERFORMANCE IS JUNE 30, 2015 THROUGH SEPTEMBER 29, 2020. THIS POP IS COMPRISED OF A ONE-YEAR BASE PERIOD, FOUR ONE-YEAR OPTION PERIODS, AND ONE OPTIONAL TRANSITION PERIOD FROM JUNE 30, 2020 THROUGH SEPTEMBER 29, 2020. OPTION PERIODS WILL BE EXERCISED AT THE SOLE DISCRETION OF THE GOVERNMENT.						
VIRGINIA COMMONWEALTH UNIVERSITY	IGF::CL::IGF FIRM-FIXED PRICE (FFP) TASK ORDER 19 AGAINST THE INFORMATION TECHNOLOGY SUPPORT SERVICES CONTRACT (ITSSC), CONTRACT NUMBER SS00-10-60113, WITH ACCENTURE FEDERAL SERVICES, FOR CONTRACTOR SUPPORT WITH TECHNICAL AREA 7 (EMERGING TECHNOLOGY APPLICATIONS). THIS TASK ORDER WILL SUPPORT 5 SUBTASKS: 7.07-621, 7.07-200, 7.07-930, 7.07-620, 7.07-701.	\$0.00	\$26,748,302.50 2015	07/17/2015	SS001560034	0	
ACCENTURE NATIONAL SECURITY SERVICES, LLC	IGF::OT::IGF MANAGE AND CONDUCT REPRESENTATIVE PAYEE REVIEWS.	\$26,198,478.61	\$26,198,478.61 2016	09/28/2016	0019	0	SS001060113
INFORMATION SYSTEMS & NETWORKS CORP	IGF::CT::IGF	\$0.00	\$25,085,621.70 2016	07/25/2016	SS001660028	0	
M.C. DEAN, INC.	NATIONAL SUPPORT CENTER OPERATIONS AND MAINTENANCE CONTRACT IGF::CT::IGF	\$3,829,307.40	\$23,704,519.30 2016	09/27/2016	SS001660042	0	
KPMG L.L.P.	AUDIT SERVICES	\$146,620.34	\$21,975,747.79 2016	10/14/2015	SS001631005	0	GS00F275CA
	IGF::CT::IGF CRITICAL FUNCTIONS  TASK ORDER 0810 AGAINST SSA'S TSRP CONTRACT, NUMBER SS00-07-60066, FOR CY-9 CONTINUED MAINTENANCE&MANAGED SERVICES / BULK MAC ORDERING OF SSA VOIP PHONES AND HARDWARE AND SOFTWARE MAINTENANCE ON SSA'S ENTIRE IPV6 TELEPHONE SYSTEM NATIONWIDE, PER THE TERMS OF THE BASIC CONTRACT.						
AVAYA FEDERAL SOLUTIONS, INC.	IGF::OT::IGF ARMED GUARD SERVICE SECOND SUPPORT CENTER	\$20,324,093.76	\$20,324,093.76 2016	03/03/2016	0810	0	SS000760066
FRONTLINE SECURITY SERVICES, LLC	IGF::CT::IGF AMERICAN SIGN LANGUAGE INTERPRETER, CART, VRI SERVICES AT THE SOCIAL SECURITY ADMINISTRATION HEADQUARTERS IN BALTIMORE, MD, INCLUDING THE WASHINGTON, DC AREA AND NATIONWIDE.	\$0.00	\$19,694,555.65 2016	12/10/2015	SS001461021A	0	
FRIENDS INTERPRETING SERVICES, LLC	IGF::OT::IGF REQUEST FOR PROPOSAL TO ACQUIRE EMC MAINTENANCE AND RELOCATION SERVICES	\$0.00	\$18,918,329.68 2017	11/17/2016	SS001760003	0	
RED RIVER COMPUTER CO., INC.		\$0.00	\$18,500,000.00 2015	08/27/2015	SS001560029	0	



EMC CORPORATION	RECOVERY- PURCHASE OF DATA AT REST (DARE) HARDWARE, SOFTWARE AND CONTRACTOR SUPPORT FROM CONTRACT SS00-16-60037 MAINTENANCE OF ORACLE SERVERS, OPERATING SYSTEMS, WITH BIOS UPDATES.	\$17,558,049.98	\$17,558,049.98 2016	06/20/2016 0037	0	SS001360037
ALLIANCE TECHNOLOGY GROUP, LLC	IGF::OT::IGF IGF::CT::IGF CRITICAL FUNCTIONS	\$0.00	\$16,200,000.00 2016	10/30/2015 SS001640002	0	GS35F0324R
AVAYA FEDERAL SOLUTIONS, INC.	TASK ORDER 0795 AGAINST SSA'S TSRP CONTRACT, NUMBER SS00-07-60066, FOR CY-8 CONTINUED 'MANAGED SERVICES' OF SSA VOIP PHONES AND HARDWARE AND SOFTWARE MAINTENANCE ON SSA'S ENTIRE IPV6 TELEPHONE SYSTEM NATIONWIDE, PER THE TERMS OF THE BASIC CONTRACT.	\$16,149,021.77	\$16,149,021.77 2015	02/19/2015 0795	0	SS000760066
RED RIVER COMPUTER CO., INC.	RENEWAL OF SS00-15-60019 ORDER 01 FOR MAINTENANCE ON CISCO NETWORK DEVICES. THIS IS A RECOMPETE REQUISITION TO OBTAIN MAINTENANCE ON FOCUS, WEBFOCUS, IWAY MAINFRAME SOFTWARE PRODUCTS FOR A BASE YEAR AND 4 OPTION YEARS	\$15,805,279.99	\$15,805,279.99 2016	04/18/2016 0018	0	SS001560019
IMMIXTECHNOLOGY, INC.	AND ADDITIONAL CAPACITY. IGF::OT::IGF - MARKETING AND PUBLIC RELATIONS SUPPORT SERVICES BLANKET PURCHASE AGREEMENT	\$1,142,332.16	\$15,171,095.65 2015	12/12/2014 SS001530139	0	GS35F0265X
CROSBY MARKETING COMMUNICATIONS INC.	IGF::CT::IGF - CRITICAL FUNCTION	\$0.00	\$15,167,695.61 2016	03/15/2016 SS001640015	0	GS23F0040L
NORTHROP GRUMMAN SYSTEMS CORPORATION	INFORMATION TECHNOLOGY SUPPORT SERVICES CONTRACT, CONTRACT NUMBER SS00-10-60082, FIRM FIXED PRICE TASK ORDER 22, WITH NORTHROP GRUMMAN, FOR CONTRACTOR SUPPORT SERVICES. THIS ACTION WILL FUND TECHNICAL AREA 8 UNDER THE FFP TASK ORDER AND FOR SUBTASKS 5.08-971, SOCIAL SECURITY ONLINE ACCOUNTING AND REPORTING SYSTEMS, AND 5.00-001 CONTRACT MANAGEMENT TASK. IGF::CT::IGF CONTRACT FOR SECURITY GUARD SERVICES AT THE WILKES-BARRE DATA OPERATIONS CENTER.	\$6,153,296.70	\$15,044,658.88 2015	01/26/2015 0022	0	SS001060082
AMERIGUARD SECURITY SERVICES, INC.	CISCO HARDWARE&SOFTWARE MAINTENANCE	\$1,940,493.46	\$14,312,576.26 2016	09/30/2016 SS001660033	0	
RED RIVER COMPUTER CO., INC.	IGF::OT::IGF TECHNOLOGY REFRESH Q3/Q4	\$13,887,540.00	\$13,887,540.00 2015	05/01/2015 0001	0	SS001560019
RED RIVER COMPUTER CO., INC.	HARDWARE&MAINTENANCE IGF::OT::IGF OTHER FUNCTIONS	\$13,772,107.22	\$13,772,107.22 2015	07/31/2015 0011	0	SS001560019
TECKNOMIC, LLC	CABLE SERVICES CONTRACT FOR CABLE INSTALLATION, REMOVAL, AND SUPPORT FOR THE SOCIAL SECURITY ADMINISTRATION (SSA) OCCUPIED BUILDINGS IN THE VICINITY OF BALTIMORE, WASHINGTON D.C., AND VIRGINIA IN ACCORDANCE WITH THE STATEMENT OF WORK. PURCHASE ELECTRIC POWER SUPPLY AGAINST GSA CONTRACT GS-00P-12-BSD-0880 FOR THE HEADQUARTERS COMPLEX BUILDINGS AND THE NATIONAL SUPPORT CENTER IN URBANA MARYLAND.	\$2,320,482.60	\$13,347,749.16 2015	09/18/2015 SS001560055	0	
INTEGRYS ENERGY SERVICES, INC.	FPDS FUNCTION: IGF::OT::IGF	\$11,300,000.00	\$11,300,000.00 2015	06/26/2015 SS001530604	0	GS00P12BSD0880
ACS FEDERAL SOLUTIONS LLC	IGF::OT::IGF - NATIONAL SCANNING SERVICES BLANKET PURCHASE AGREEMENT - CALL ORDER 2	\$10,126,933.76	\$10,126,933.76 2016	05/17/2016 0002	0	SS001540019
LOCKHEED MARTIN CORPORATION	IGF::CL::IGF - MODIFICATION 2 TO TASK ORDER 7 AGAINST INFORMATION TECHNOLOGY SUPPORT SERVICES CONTRACT (ITSSC), CONTRACT NUMBER SS00-10-60108, WITH LOCKHEED MARTIN FOR CONTRACTOR SUPPORT. THIS MODIFICATION IS TO INCORPORATE ONE ADDITIONAL SUBTASK UNDER TECHNICAL AREA 2, APPLICATION DESIGN, DEVELOPMENT, TESTING, AND MAINTENANCE.	\$10,100,531.54	\$10,100,531.54 2015	01/02/2015 0007	2	SS001060108

PURCHASE ELECTRIC UTILITY POWER AGAINST GSA  
CONTRACT #GS-00P-12-BSD-0880 FOR THE  
HEADQUARTERS COMPLEX BUILDINGS AND THE  
NATIONAL SUPPORT CENTER IN URBANA  
MARYLAND.

CONSTELLATION ENERGY SERVICES, INC.	FPDS FUNCTION: IGF::OT::IGF	\$10,100,000.00	\$10,100,000.00 2016	06/23/2016	SS001630467	0	GS00P12BSD0880
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**List of any pending regulations to be published in the Federal Register**

**Prepared by OLCA**

**December 23, 2016**

We have no regulations scheduled for publication in the Federal Register at this time.

There are two regulations under review at OMB (reginfo.gov), but we cannot anticipate if or when OMB will conclude review and approve them for publication. The two regulations are:

- "Revisions to Rules of Conduct and Standards of Responsibility for Appointed Representatives"
- "Revisions to Rules Regarding the Evaluation of Medical Evidence"

Transition Team Member Document--Non-Public Information. This document may be disclosed to Authorized Transition Team Members only.

**Social Security Administration**  
**Social Security Disability and Health Information Technology – December 5, 2016**

**EXECUTIVE SUMMARY:**

Serving the public through a stronger, more responsive disability program by maximizing efficiencies throughout the disability program is a strategic goal and agency commitment. Part of this goal is leveraging the availability of electronic medical records with user-enhancements, such as standard content organization and decision-support, to serve our claimants through more timely and accurate disability determinations. Doing so also improves program effectiveness and efficiency; thus, helping to process the Disability Determination Services (DDS) and Office of Disability Adjudication and Review (ODAR) workloads more accurately and timely, and reducing the number of pending claims by facilitating a complete record at the initial claims level. SSA is a leading federal agency in the Health Information Technology (Health IT) industry—ensuring our content and system requirements are included in the industry standards.

Currently, information obtained from health IT represents 11.23 percentage of the medical evidence in SSA disability claims. Our main challenge to the rate of growth is the availability of sufficient resources with Health IT knowledge and experience to bring on new providers and to ensure that newly forming exchange networks incorporate our requirements in their standards. Failure to seize the opportunities at hand to on-board providers and to drive standards may put the agency in a position where we are unable to obtain the necessary medical evidence needed to make decisions. For example, once standards are developed, the industry may not tailor their requirements to meet our needs. Further, providers who exchange information electronically eliminate the infrastructure necessary to support the current manual process. Therefore, sufficient and sustained investment in Health IT is essential to our ability to serve individuals with a disability through a strong and responsive disability program.

**BUSINESS NEED:**

Medical records are key to making disability determinations. Currently, most of the medical records that SSA receives are in the form of mailed, faxed, and/or scanned images of paper. Requesting and waiting to receive the medical records required to evaluate disability is often the most time consuming part of the disability determination process—often taking weeks to months. In FY2016, SSA received about 15M pieces of medical evidence records (MER) and paid for 2.3M Consultative Exam (CE) reports. Collectively, this represents ~543M pages of medical documentation that DDS and Hearing Office resources need to review. Under the non-Health IT process, each one of these medical records were converted to TIF image documents before storing in the respective claimant's Electronic Folder (EF); thus, limiting the ability to readily search the documentation, conduct data analytics, and introduce decision support.

**HEALTH IT POTENTIAL:**

SSA has been sponsoring an ongoing, multi-year effort to leverage the healthcare industry's move to electronic medical records (EMR) since 2007. Health IT supports health information management across computerized systems and the secure exchange of health information between consumers, providers, and payers. Access to electronic medical records allows our adjudicators and decision-makers the ability to reduce the amount of days it takes to receive medical records. Natural Language Processing (NLP) offers the opportunity to extract clinical information (e.g. diagnoses, procedures, lab results) from these documents. Using these industry and technological advancements, we have developed software, Medical Evidence Gathering and Analysis through Health IT (MEGAHIT), and used it to enhance decision support for the past seven years. MEGAHit automates the request and receipt of EMRs, displays the information in a consistent format, automates the fiscal process, and is able to perform decision support based on the

**Social Security Administration**  
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standardized codified information contained therein—currently 6 percent of health IT cases in FY16 include decision support. Our vision is to increase the amount of medical evidence obtained through Health IT (and other electronic venues), and the amount of decision support, until this is our primary way to conduct business. In this manner, an adjudicator and decision-maker will have all of the medical evidence and policy guidance needed to decide a case when they first open it—resulting in more timely and accurate disability determinations for individuals with a disability.

**BENEFITS:**

**Benefits to the Public:**

- Faster and more consistent disability decisions
- Quicker access to monthly cash benefits
- Earlier access to medical insurance coverage
- Fewer consultative examinations
- Reduced burden to provide medical record

**Health IT Benefits to the Social Security Disability Determination Process:**

- **Improves how we collect and use medical information** - Fully automates the request and receipt process and gives adjudicators access to medical records within seconds of transmitting the request as opposed to days and weeks
- **Provides decision support through use of business rules** - Automatically alerts adjudicators to key findings within the record that could result in an allowance
- **Enables more efficient processing of medical evidence** - Allows adjudicators to easily navigate the record and quickly identify significant or missing medical information
- **Reduces disability determination case processing time** – In FY 16, initial cases with health IT sources processed 10% (9 days) faster than other cases; initial cases with only health IT processed 49% (43 days) faster

**Health Care Provider Benefits:**

- Reduced administrative cost and labor to pull records
- Reduced uncompensated care faster for disability and patient access quicker to Medicare/Medicaid benefits
- Increased revenue due to the ability to respond to greater number of requests and records
- Automated payments from SSA
- Increased patient satisfaction

**COST BENEFIT ANALYSIS:**

Benefit Factor	FY2017	FY2018	FY2019	FY2020	FY2021	Total
Cost Savings	\$ 8,465,714	\$ 12,787,783	\$ 22,698,196	\$ 44,659,913	\$ 51,081,814	\$ 139,693,420
Cost Avoidance	\$ 9,478,184	\$ 13,380,965	\$ 22,301,609	\$ 41,815,517	\$ 47,390,919	\$ 134,367,194
Total	\$ 17,943,898	\$ 26,168,748	\$ 44,999,805	\$ 86,475,430	\$ 98,472,733	\$ 274,060,614

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**RETURN ON INVESTMENT: NPV: \$236,758,843; ROI: 512%**

CBA Factor	FY2017	FY2018	FY2019	FY2020	FY2021	Total
Costs	\$ 8,701,098	\$ 7,118,932	\$ 6,354,603	\$ 6,048,390	\$ 5,323,787	\$ 33,546,810
Benefits	\$ 17,943,898	\$ 26,168,748	\$ 44,999,805	\$ 86,475,430	\$ 98,472,733	\$ 274,060,614
Net Benefits	\$ 9,242,800	\$ 19,049,816	\$ 38,645,202	\$ 80,427,040	\$ 93,148,946	\$ 240,513,804

**STATUS:**

From project inception to date, SSA has established working relationships with 57 health care organizations, representing 7,288 health care providers, to automate the request and receipt of EMRs for disability claimants. Currently over 11.23% of all initial disability claims contain medical evidence received via the automated Health IT process received over the “eHealth Exchange” network. The eHealth Exchange network is a community of partners who share health information under a common trust framework and a common set of rules. SSA was the first participant when eHealth Exchange (formerly known as NwHIN) began operating in 2009. As of November 2016, the eHealth Exchange has more than 140 participating organizations, sharing health data for more than 100 million patients. Participants include four federal agencies, approximately 50% of US hospitals, 26,000 medical groups, 3,400 dialysis centers, and 8,300 pharmacies.

SSA has been an active participant and collaborator with the Office of the National Coordinator’s Federal Health Architecture Boards, as well as, government-wide health IT policy and standards advisory panels, and workgroups. These collaborations bring together Federal, State, and private sector organizations to work toward the common goal of wide spread interoperability of health care records. We participate in these committees to ensure that Social Security’s unique business needs are met. Currently, we are in active discussions with the two new networks that are joining eHealth Exchange on the information exchange highway—CareQuality and Commonwealth. Together, these three networks will cover the majority of the health care facilities and providers—large and small alike.

**FY17 FUNDING REQUEST:**

To support Health IT efforts, we requested and received \$33.5 million over the course of FYs 17-21 to support:

- 5-year funding for Health IT Program Support
  - MEGAHIT Enhancements
  - Industry Standards and Collaboration
  - Obtaining Medical Evidence of Record (MER)
- 5-year funding for Open Source Language & Computing
- 1-year funding for Planning & Analysis to update our market research into technology that enables technicians to search, filter, link, and organize medical information

**Social Security Administration**  
**Social Security Disability and Health Information Technology – December 5, 2016**

This level of funding will increase the percentage of information received through HIT but will not realize the full potential of Health IT and our vision without further investment and accelerated growth.

Current Status – 57 organizations with 7,288 participating providers in 49 States, DC, Guam, and Puerto Rico

Organization	State	Technology Vendor	Production Date	FY12 (Actual)	FY13 (Actual)	FY14 (Actual)	FY15 (Actual)	FY16 (Actual)	FY17 (thru November)	FY17 (Estimate)
IOD Inc (CHIC)	MN	ApeniMED/IOD	09/17/11	880	895	1,184	1,434	1,399	217	1,400
Marshfield	WI	ApeniMED/IOD	08/06/11	2,492	3,465	3,633	4,028	3,256	592	3,300
<b>Total -- ApeniMed/IOD</b>				<b>3,372</b>	<b>4,360</b>	<b>4,817</b>	<b>5,462</b>	<b>4,655</b>	<b>809</b>	<b>4,700</b>
Carilion	VA	Epic	10/21/14	0	0	0	8,599	11,277	1,661	11,700
Carle Foundation	IL	Epic	04/28/14	0	0	1,073	3,370	4,857	635	5,000
Cedars-Sinai	CA	Epic	05/04/15	0	0	0	797	1,888	312	1,900
Children's	TX	Epic	09/22/12	12	2,095	2,697	3,863	4,172	463	4,300
Cleveland Clinic	FL, NV, OH	Epic	07/15/14	0	0	3,034	17,595	20,373	3,121	21,000
Contra Costa	CA	Epic	10/31/16	0	0	0	0	0	139	TBD
Dean Clinic	WI	Epic	09/12/16	0	0	0	0	139	450	2,600
Essentia Health	MI, MN, ND, WI	Epic	02/18/15	0	0	0	4,690	7,500	1,089	8,000
Fairview Health	MN	Epic	07/07/15	0	0	0	1,809	8,392	1,278	8,600
Geisinger	PA	Epic	08/26/13	0	854	8,174	12,885	15,462	1,969	16,000
Group Health	WA	Epic	08/25/14	0	0	89	2,180	2,931	457	3,000
Gundersen Health	IA, MN, WI	Epic	04/09/14	0	0	1,104	2,661	3,030	469	3,100
Guthrie Health	NY, PA	Epic	02/15/14	0	0	1,293	2,228	2,379	308	2,400
Hawaii	HI	Epic	12/01/12	0	1,860	2,159	2,845	3,330	478	3,400
Inova Health	VA, WV	Epic	04/04/16	0	0	0	0	3,407	678	6,800
Kadlec	OR, WA	Epic	09/12/16	0	0	0	0	180	392	2,700
Kaiser Permanente	CA, CO, DC, GA, HI, MD, OR, VA, WA	Epic	07/12/12	334	11,015	26,261	39,837	54,310	8,641	58,000
Lancaster General	PA	Epic	09/22/12	45	3,566	4,786	5,217	5,626	918	5,800
Legacy Health	OR, WA	Epic	12/19/14	0	0	0	4,915	6,955	985	7,100
Martin Health	FL	Epic	12/18/14	0	0	0	706	1,019	113	1,100
MemorialCare	CA	Epic	12/01/14	0	0	0	2,321	2,579	371	2,600
Mercy Health	KY, MI, OH, PA	Epic	01/29/15	0	0	0	11,398	19,677	3,112	20,000
Mercy Hospital	AR, IL, KS, MO, OK	Epic	04/01/16	0	0	0	0	9,645	3,205	20,000
MetroHealth	OH	Epic	05/13/14	0	0	2,364	7,285	8,331	1,164	8,400
MSMC	FL	Epic	10/05/15	0	0	0	0	606	82	600
MultiCare	WA	Epic	11/17/12	0	2,269	5,547	7,058	7,540	1,093	7,700
MUSC	SC	Epic	11/04/13	0	5	10,279	10,024	8,192	562	8,300
Novant Health	NC, SC, VA	Epic	07/10/15	0	0	0	2,920	16,339	2,421	16,700
OCHIN	AK, CA, FL, IN, MA, NC, OH, OR, UT, WA, WI	Epic	05/19/11	3,749	8,149	11,494	14,388	18,358	3,023	20,000
OHSU	OR, WA	Epic	03/09/15	0	0	0	5,540	13,335	2,227	15,000
OSF HealthCare	IL	Epic	08/19/15	0	0	0	986	12,489	2,107	14,000
Parkland Hospital	TX	Epic	03/19/15	0	0	0	5,670	10,481	1,568	11,000
Portland Clinic	OR	Epic	08/07/15	0	0	0	47	400	66	450
Presbyterian Health	NM	Epic	10/06/14	0	0	0	5,997	7,853	1,201	8,000
Salem Health	OR	Epic	07/21/14	0	0	320	1,990	2,875	534	3,000
Sanford Health	IA, MN, ND, OK, OR, SD	Epic	09/22/14	0	0	136	9,751	12,225	1,805	13,000
Sentara	NC, VA	Epic	11/10/14	0	0	0	10,057	11,675	1,877	12,000
SSM Health	IL, MO, OK	Epic	03/10/15	0	0	0	5,893	11,575	1,557	12,000
Stanford	CA	Epic	04/09/15	0	0	0	779	2,229	465	3,000
Sutter Health	CA	Epic	12/07/15	0	0	0	0	12,711	2,349	16,000
Swedish Medical	WA	Epic	07/27/16	0	0	0	0	720	624	4,500
THR	TX	Epic	08/11/14	0	0	53	2,965	4,434	772	4,600
UnityPoint	IA, IL, NE, WI	Epic	11/14/16	0	0	0	0	0	746	TBD
UC Davis	CA	Epic	02/19/13	0	1,673	2,133	4,174	4,331	677	4,500
UC San Diego	CA, NV	Epic	06/27/16	0	0	0	0	1,066	593	4,400
Univ of Iowa	IA	Epic	10/01/14	0	0	0	8,939	9,147	1,555	9,200
Univ of Wisconsin	WI	Epic	12/08/14	0	0	0	4,748	6,841	978	6,900
Vancouver Clinic	WA	Epic	04/04/16	0	0	0	0	554	153	1,100
Vidant Health	NC	Epic	09/08/15	0	0	0	618	11,633	1,794	13,000
Yale New Haven	CT	Epic	03/19/14	0	0	5,694	12,155	14,602	2,498	15,000
<b>Total -- Epic</b>				<b>4,140</b>	<b>31,486</b>	<b>88,690</b>	<b>249,900</b>	<b>399,670</b>	<b>65,735</b>	<b>447,450</b>
Beth Israel	MA	N/A	Pre-2011	1,441	1,692	2,789	3,775	3,689	469	3,700
IHIE (Regenstrief)	IN	N/A	05/09/12	5,010	13,726	23,487	28,174	25,341	3,241	26,000
MedVA	VA	NHITConnect	05/21/11	3,346	5,243	6,639	8,977	10,738	1,543	11,000
<b>Total -- Other</b>				<b>9,797</b>	<b>20,661</b>	<b>32,915</b>	<b>40,926</b>	<b>39,768</b>	<b>5,253</b>	<b>40,700</b>
DoD	National	N/A	11/23/15	0	0	0	218	16,832	3,933	28,000
VA	National	N/A	11/10/16	0	0	0	0	0	1,958	TBD
<b>Total -- Federal (VLER)</b>				<b>0</b>	<b>0</b>	<b>0</b>	<b>218</b>	<b>16,832</b>	<b>5,891</b>	<b>28,000</b>
<b>Total -- Inactive Partners</b>				<b>5,361</b>	<b>5,892</b>	<b>4,958</b>	<b>1,418</b>	<b>290</b>	<b>0</b>	<b>0</b>
Additional Partners			TBD							329,150
				<b>22,670</b>	<b>62,399</b>	<b>131,380</b>	<b>297,928</b>	<b>461,219</b>	<b>77,688</b>	<b>850,000</b>

FY17 Percent of Initial Level Closed Cases with Health IT MER (as of 11/25/16): 11.23%

FY17 Agency Tracking Report target through November 2016: 9.89%



1.34%

#### Assumptions:

- Dynamic market forces (e.g. mergers, acquisitions, financial sustainability, and changes in business relationships) may cause some of our Exchange partners to become inactive
- Actual volumes for in-production partners are based on the EMIS Health IT Dashboard

11/28/2016

## SSA Health IT At-A-Glance – FY17 (as of November 25, 2016)

<b>Partners</b>	<b>7,288</b> health IT providers* within <b>57</b> organizations
<b>States with Providers</b>	<b>49</b> (AK, AL, AR, AZ, CA, CO, CT, DE, FL, GA, HI, IA, ID, IL, IN, KS, KY, LA, MA, MD, ME, MI, MN, MO, MS, MT, NC, ND, NE, NH, NM, NJ, NV, NY, OH, OK, OR, PA, RI, SC, SD, TN, TX, UT, VA, WA, WI, WV, WY) plus DC, Guam, and Puerto Rico
<b>Case Processing Time</b>	<b>FY 2016:</b> <ul style="list-style-type: none"> <li>➤ Cases with health IT sources processed <b>10.2% (9 days)</b> faster than other initial cases</li> <li>➤ Cases with only health IT sources processed <b>48.9% (43 days)</b> faster than all other initial cases</li> </ul> <b>November 2017:</b> <ul style="list-style-type: none"> <li>➤ Cases with health IT sources processed <b>10.5% (9 days)</b> faster than other initial cases</li> <li>➤ Cases with only health IT sources processed <b>51.2% (44 days)</b> faster than other initial cases</li> </ul>
<b>FY 2017 Performance Measure Results (3.2a)</b>	Improve the disability determination process by increasing the percentage of initial disability claims with health IT medical evidence – FY16 goal is <b>12%</b> <ul style="list-style-type: none"> <li>➤ November goal – <b>9.89%</b></li> <li>➤ Actual to date – <b>11.23%</b></li> </ul>
<b>Medical Evidence of Record (MER) Volume</b>	<ul style="list-style-type: none"> <li>➤ <b>38,660</b> MER received via health IT for the month of November</li> <li>➤ <b>77,688</b> MER received via health IT for FY 17 (through November)</li> <li>➤ <b>461,219</b> MER received via health IT for FY16, which is <b>55%</b> more than FY15</li> </ul> <i>Note: One health IT MER request may collect information from more than one source identified by claimant</i>
<b>Newest Partners</b>	Dean Clinic (September), Kadlec Regional Medical Center (September), Department of Veterans Affairs pilot (October), Contra Costa Health Services (November), UnityPoint Health (November)
<b>Outreach</b>	We plan to continue our expansion of health IT partners with new high volume organizations as well as additional facilities with existing partners. Current outreach status: <ul style="list-style-type: none"> <li>➤ <b>13</b> healthcare organizations in various stages of active on-boarding</li> <li>➤ <b>8</b> current partner facility expansions</li> <li>➤ In discussions with <b>106</b> healthcare organizations</li> <li>➤ Working with <b>15</b> healthcare system vendors to include SSA requirements</li> </ul>
<b>Interesting Fact</b>	On <b>November 9<sup>th</sup></b> , SSA and the Department of Veterans Affairs (VA) made a joint announcement regarding health IT interoperability. <ul style="list-style-type: none"> <li>➤ Virginia Reno, Deputy Commissioner of Retirement and Disability Policy, participated in a joint presentation with Dr. David Shulkin (Under Secretary for Health) and Robert Reynolds (Deputy Under Secretary for Disability Assistance, Veterans Benefits Administration)               <ul style="list-style-type: none"> <li>○ Audience included Veteran Service Organization (VSO) Executive Directors</li> <li>○ Attendees included Systems, ORDP, OCOMM, and OLCA</li> </ul> </li> <li>➤ Both SSA and VA issued Press Releases:               <ul style="list-style-type: none"> <li>○ SSA - <a href="https://www.ssa.gov/news/press/releases/#/post/11-2016-1">https://www.ssa.gov/news/press/releases/#/post/11-2016-1</a></li> <li>○ VA - <a href="http://www.va.gov/opa/pressrel/pressrelease.cfm?id=2831">http://www.va.gov/opa/pressrel/pressrelease.cfm?id=2831</a></li> </ul> </li> </ul>

\* Providers registered as active in the MEGAHIT system

# **FY 2017 Congressional Justification**

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## **Anti-Fraud Report**

# **FY 2017 BUDGET OVERVIEW**

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## **A MESSAGE FROM THE ACTING COMMISSIONER**

As the Acting Commissioner, it is rewarding to know that our services continue to play a critical role in the lives of millions of people. We are the face of the Federal Government for many, and over the past eight decades, generations of Americans have relied on our programs and compassionate employees to help them navigate through life's personal challenges and during times of change. Today, over 65,000 dedicated Social Security employees make up our great agency and provide exemplary service to the public. Thanks to these dedicated employees, America's hardworking citizens, and support from the Administration and the Congress, Social Security will continue to provide an economic safety net that has kept millions of our citizens from indigence in their old age and disability-prone years.

While we have endured funding constraints, sequestration, and a Government shutdown at the beginning of this decade, the funding we received for fiscal years (FY) 2014 and 2015 provided much-needed relief and allowed for critical service improvements. Our current state of service remains fragile, though, as the demands of balancing service and stewardship responsibilities continue to strain our resources. Our FY 2016 budget will not allow us to sustain our recent gains, unfortunately, as the FY 2016 funding level does not cover all inflationary growth in our fixed costs (e.g. payroll, benefits, guard services, and rent). The FY 2017 President's Budget of \$13.067 billion will keep us on the right path. While we continue to look for efficiencies and ways to work better and smarter, especially in light of our service challenges, it is essential that we receive the full budget request to ensure our ability to execute critical service delivery efforts, modernize our IT infrastructure, and expedite implementation of important SSA provisions in the Bipartisan Budget Act (BBA) of 2015.

The FY 2017 President's Budget will allow us to balance our important service and stewardship work, and address the critical agency priorities outlined in Vision 2025. Specifically, we will execute our Compassionate and Responsive Services (CARES) plan, a multiyear plan to eliminate the hearings backlog; implement many of the provisions in the BBA; significantly increase our cost-effective program integrity work; reduce National 800 Number wait times; and invest in our IT infrastructure.

The FY 2017 President's Budget will fully fund administrative law judge (ALJ) and support staff hiring to implement our CARES plan to tackle our hearings backlog. With sustained funding, our goal is to get to a 270-day hearings wait time by FY 2020, down from over 500 days today. Our plan, which is built on people and quality, combines a number of immediate, tactical, and strategic initiatives to increase hearings adjudication and disposition capacity, improve ALJ support and staff efficiency, and strengthen personnel oversight and policy compliance without sacrificing our commitment to quality.

Vision 2025, our long-range strategic plan, is shaping the future of Social Security service delivery and will provide a framework to tackle our current challenges. With full funding of the FY 2017 President's Budget request, we can ensure high-quality service and address the critical agency priorities outlined in Vision 2025.

**Providing a Superior Customer Experience:** We are committed to providing superior customer service, whether it is in-person, online, or on the telephone. Starting with our direct service areas, we are focused on providing relief to our frontline staff by expanding our use of alternate service delivery methods. We are also leveraging increased demand for our online services to allow for additional flexibility in our field offices.

**Supporting Our Exceptional Employees:** We are focused on attracting, training, and retaining employees who can provide superior service to the public now and in the future. With nearly 20 percent of our workforce currently eligible for retirement, employee development and engagement, and improving succession management are critical priorities for our agency. We will equip our employees with the skills and tools they need to do their jobs more efficiently by providing training opportunities and investing in technology.

**Moving forward as an Innovative Organization:** We are committed to accelerating our use of data-driven decisions to improve processes and deliver faster and more accurate service to our customers. In addition, we will provide greater oversight and project management expertise to increase the success of mission-critical projects. We will also begin the process of modernizing our IT to bring our legacy systems up to current standards.

**Enhancing Program Integrity:** We continue to increase our efforts to reduce improper payments and to combat fraud, waste, and abuse. In FY 2015, we expanded to 36 Cooperative Disability Investigation (CDI) units across 31 States and the Commonwealth of Puerto Rico, and our Budget request will allow us to continue to expand these important anti-fraud units. We will harness the benefits of data analytics to guard against new and developing fraud schemes. In addition, we propose to process more than one million full medical continuing disability reviews (CDR) in FY 2017, which will save billions of taxpayer dollars and allow us to achieve CDR currency by the end of FY 2019.

Our FY 2017 budget is pivotal to strengthening the tenuous state of our services and positioning the agency for the future. With the requested funding, we can move forward on a path to providing quality services and position the agency to best serve the public both now and in the future.

Carolyn W. Colvin  
Acting Commissioner



## OUR PROGRAMS

Whether it is after the loss of a loved one, at the onset of disability, or during the transition from work to retirement, we touch the life of virtually every person in America. We administer three key programs that serve the public.

- Old-Age and Survivors Insurance: Created in 1935, the Old-Age and Survivors Insurance (OASI) program provides retirement and survivors benefits to qualified workers and their family members. In FY 2017, we will pay a total of about \$813 billion in OASI benefits to a monthly average of approximately 52 million beneficiaries, including 89 percent of the population aged 65 and over.
- Disability Insurance: Established in 1956, the Disability Insurance (DI) program provides benefits for disabled workers and their families. In FY 2017, we will pay a total of about \$149 billion in DI benefits to a monthly average of approximately 11 million disabled workers and their family members per month.
- Supplemental Security Income: Established in 1972, the Supplemental Security Income (SSI) program provides financial support to aged, blind, and disabled adults and children who have limited income and resources. In FY 2017, we will pay a total of nearly \$59 billion in Federal benefits and State supplementary payments to a monthly average of approximately 8.4 million recipients.

We also increasingly contribute in important ways to furthering other national priorities, including activities related to: the Employees Retirement Income Security Act of 1974, the Coal Act, Supplemental Nutrition Assistance Program (formerly Food Stamps), Social Security Number (SSN) verifications for a wide-range of non-SSA program purposes, the Help America Vote Act, the State Children's Health Insurance Program, and Federal Benefits for Veterans.

Our ongoing workloads include the following:

- Claims: We take claims, evaluate evidence, and determine benefit eligibility and payment amounts. In FY 2017, we will handle over 5.7 million retirement, survivors, and Medicare claims; over 2.8 million Social Security and SSI initial disability claims; and nearly 216,000 SSI aged claims.
- Appeals: We have three levels of administrative appeals for claimants who disagree with our decisions:
  - 1) Reconsideration, which entails a complete review of the claim by an employee who did not take part in the initial determination;
  - 2) Hearing before an ALJ; and
  - 3) Request for review by the Appeals Council. If a claimant disagrees with the Appeals Council's decision or if the Appeals Council decides not to review the case, a claimant may file a lawsuit in a Federal district court.

In FY 2017, we will complete approximately 715,000 reconsiderations, 784,000 hearings, and 140,000 Appeals Council reviews.

- Program Integrity: Our stewardship responsibility includes conducting non-medical SSI redeterminations and full medical CDRs. These reviews save significant program dollars by avoiding improper payments. In FY 2017, we will conduct 2.822 million SSI redeterminations and 1.1 million full medical CDRs.
- Social Security Numbers: We complete applications for and assign SSNs to all Americans. In FY 2017, we will complete requests for approximately 16 million new and replacement Social Security cards.
- Earnings Records: We receive regular updates from employers on the earnings of the working population. We post the reported earnings to workers' records. We link these earnings records to the appropriate workers' SSN and resolve any discrepancies. In FY 2017, we will post 265 million earnings items to workers' records.
- Social Security Statements: We provide information on earnings as well as estimates of future benefits workers and their families may receive based on those earnings. We will process 44 million paper Social Security Statements in FY 2017 in accordance with our plan to mail a paper statement to workers attaining ages 25, 30, 35, 40, 45, 50, 55, and 60 and older who are not receiving Social Security benefits and who are not registered for [my Social Security](#). Individuals may access their Social Security Statement at any time through their personal online [my Social Security](#) account.
- Services After Individuals Become Eligible for Benefits: In FY 2017, we will complete more than 100 million post-entitlement actions for beneficiaries, including issuing emergency payments, recomputing payments, and completing address and status changes.
- Medicare Administration Assistance: For over four decades, we have assisted the Centers for Medicare and Medicaid Services in administering the Medicare Hospital Insurance and Supplementary Medical Insurance programs. In addition to determining Medicare eligibility, in FY 2017, we will handle about 1 million Medicare prescription drug subsidy applications.
- Data Exchanges: We provide and verify data for many purposes such as employment, voting, and eligibility for Federal and State programs, including the Affordable Care Act and the Department of Veterans Affairs.

## **FY 2015 ACCOMPLISHMENTS**

We are pleased that we ended FY 2015 with nearly all of the employees we added in the previous year. As our new employees completed training and gained on-the-job experience, we were able to make some improvements in our direct service areas. Most notably, we reduced busy signals and wait times on our National 800 Number. The employees we added also allowed us to restore some service hours to the public that we previously cut because of insufficient

resources. Our online services continued to provide relief to our frontline positions, as more than 50 percent of all retirement and disability claims were filed online. In addition, the public used our website to complete nearly 87 million other transactions.

Our FY 2015 funding allowed us to make considerable progress in our ongoing fight against fraud, waste, and abuse. Starting with our important program integrity work, we completed 50 percent more CDRs than we did in FY 2014 and maintained our high volume of SSI redeterminations. We continued our commitment to prevent and deter fraud by establishing the Office of Anti-Fraud Programs to centralize our anti-fraud efforts. We also expanded our CDI program to 36 units covering 31 states and the Commonwealth of Puerto Rico.

In FY 2015, we:

- paid over \$930 billion to more than 67 million beneficiaries;
- handled approximately 37 million calls on our National 800 Number;
- served over 40 million visitors in over 1,200 field offices nationwide;
- received over 66 million calls to field offices nationwide;
- completed over 8 million claims for benefits and more than 660,000 hearing dispositions;
- handled over 35 million changes to beneficiary records;
- issued about 16 million new and replacement Social Security cards;
- posted about 266 million wage reports;
- handled over 18,000 cases in Federal District Courts;
- completed 799,000 full medical CDRs; and
- completed over 2.2 million non-medical redeterminations of SSI eligibility.

## **FY 2017 BUDGET REQUEST**

Our FY 2017 President's Budget of \$13.067 billion will allow us to balance our important service and stewardship work, and address the critical agency priorities outlined in Vision 2025. Specifically, we will build a workforce to execute our multiyear plan to eliminate the hearings backlog, increase our cost-effective program integrity work, implement many of the provisions in the BBA, and invest in our IT infrastructure. We will work to reverse the service deterioration that will result from constrained funding in FY 2016, and we will build additional capacity in key areas to address specific challenges. This level of funding will allow us to:

- Execute our CARES plan, which includes aggressive hiring of ALJs and support staff, as well as other initiatives, to increase the number of hearings completed by nearly 20 percent;
- Improve frontline service to the public, such as in our field offices and on our National 800 Number;

- Significantly increase CDRs and SSI redeterminations, by nearly 40 percent and 25 percent, respectively;
- Provide additional resources to our State disability determination services (DDS), to support implementing BBA-related changes including the elimination of single decision maker (SDM) authority, completing higher levels of continuing disability reviews, and processing high levels of initial disability claims.
- Expand our efforts to prevent and deter fraud by adding new units to our CDI program, and continue to support our SSA fraud prosecutors;
- Provide our employees with training opportunities to ensure successful knowledge transfer and leadership development;
- Continue to enhance our online services and promote them as a safe and convenient service option;
- Make more data-driven decisions to improve processes throughout the agency;
- Strengthen support for mission-critical projects to increase chances of success; and
- Implement a more efficient IT investment strategy and begin modernizing our IT infrastructure.

The following charts provide the FY 2017 President's Budget request for our administrative expenses, including funding amounts, associated workyears, and key performance goals. The first chart, the FY 2017 Funding Table, provides amounts for our key appropriations and the associated workyears. The second chart, the FY 2017 Performance Table, includes the actual performance for FY 2015 and anticipated targets for FYs 2016 and 2017 for our key performance measures.

## FY 2017 PRESIDENT’S BUDGET REQUEST – FUNDING

The funding table below provides actual dollar figures and workyears expended for FY 2015, our estimated spending for FY 2016 based upon Public Law 114-113, and our FY 2017 budget request.

<b>FY 2017 Funding Table</b>	<b>FY 2015 Actual</b>	<b>FY 2016 Enacted</b>	<b>FY 2017 Request</b>
<b>Budget Authority</b> (in millions)			
<b>Limitation on Administrative Expenses (LAE)</b>	\$11,806	\$12,162	\$13,067
<b>Research and Demonstrations</b>	\$83	\$101	\$58
<b>Office of the Inspector General (OIG)</b>	\$103	\$106	\$112
<b>Total Budget Authority</b> <sup>1</sup>	<b>\$11,992</b>	<b>\$12,368</b>	<b>\$13,237</b>
<b>Workyears</b>			
Full-Time Equivalents	63,394	64,860	66,140
Overtime	2,831	674	2,200
Lump Sum	<u>246</u>	<u>298</u>	<u>298</u>
<b>Total SSA Workyears</b> <sup>2</sup>	<b>66,471</b>	<b>65,832</b>	<b>68,638</b>
Disability Determination Services (DDS) Workyears	<u>14,925</u>	<u>15,270</u>	<u>16,000</u>
<b>Total SSA/DDS Workyears</b>	<b>81,396</b>	<b>81,102</b>	<b>84,638</b>
OIG Workyears	<u>533</u>	<u>543</u>	<u>564</u>
<b>Total SSA/DDS/OIG Workyears</b>	<b>81,929</b>	<b>81,645</b>	<b>85,202</b>

<sup>1</sup> Totals may not add exactly due to rounding.

<sup>2</sup> Totals do not include MACRA workyears.

## FY 2017 PRESIDENT’S BUDGET REQUEST – PERFORMANCE

The performance table below reports our actual performance for FY 2015, our estimate for what we can achieve in FY 2016 based upon P.L.114-113, and what we can achieve with our FY 2017 budget request.

<b>FY 2017 Performance Table</b>	<b>FY 2015 Actual</b>	<b>FY 2016 Enacted<sup>1</sup></b>	<b>FY 2017 Request</b>
<b>Selected Workload Measures</b>			
Retirement and Survivors Claims Completed (thousands)	5,327	5,586	5,732
Initial Disability Claims Completed (thousands)	2,759	2,695	2,810
Disability Reconsiderations Completed (thousands)	723	702	715
Hearings Completed (thousands)	663	703	784
National 800 Number Calls Handled (millions)	37	34	38
Average Speed of Answer (ASA) (seconds)	617	945	675
Agent Busy Rate (percent)	7.5	9.5	7.0
Social Security Numbers (SSN) Completed (millions)	16	16	16
Annual Earnings Items Completed (millions)	266	264	265
Social Security Statements Issued (millions) <sup>2,3</sup>	50	38	44
<b>Selected Outcome Measures</b>			
Initial Disability Claims Receipts (thousands)	2,756	2,807	2,817
Hearings Receipts (thousands)	746	730	729
Initial Disability Claims Pending (thousands)	621	733	740
Disability Reconsiderations Pending (thousands)	144	136	137
Hearings Pending (thousands)	1,061	1,087	1,033
Average Processing Time for Initial Disability Claims (days)	114	113	113
Average Processing Time for Disability Reconsiderations (days) <sup>4</sup>	113	N/A	109
Annual Average Processing Time for Hearings Decisions (days)	480	540	555
Disability Determination Services Production per Workyear	307	307	314
Office of Disability Adjudication and Review Production per Workyear	95	94	98
Other Work/Service in Support of the Public - Annual Growth of Backlog (workyears)	N/A	(2,000)	(2,700)
<b>Selected Program Integrity Performance Measures</b>			
Periodic Continuing Disability Reviews (CDR) Completed (thousands)	1,972	1,950	2,200
Full Medical CDRs (included above, thousands)	799	850	1,100
Supplemental Security Income (SSI) Non-Medical Redeterminations Completed (thousands)	2,267	2,522	2,822

<sup>1</sup> FY 2016 is a 53-week year for management information purposes. After the close of the year, we will report both 52 and 53-week actual performance data. Our budgeted performance goals are full-year goals based on the workyears we are able to support with funds available in FY 2016.

<sup>2</sup> The Social Security Statements Issued measure includes paper statements only; does not include electronic statements issued.

<sup>3</sup> The original estimate for Social Security Statements (SSS) Issued measure in the FY 2016 President’s Budget was 45 million. This has been reduced by ~6.6 million, as a result of the agency sending out the scheduled SSS for FY 2016 October in FY 2015 September. Therefore, the FY 2016 Enacted number has been adjusted to ~38 million.

<sup>4</sup> We developed management information for Average Processing Time for Disability Reconsiderations in FY 2013. FY 2014 is the first full fiscal year for which data are available for this measure. Now that we have had the opportunity to analyze at least two years of actual data, this year we developed a performance target for FY 2017.

## **BIPARTISAN BUDGET ACT OF 2015 (BBA)**

We are pleased with the BBA's support to protect and strengthen our programs, and we will work to implement the provisions in the Act as expeditiously as possible. The BBA will help us address critical priorities, such as reducing improper payments and ensuring we have an adequate pool of ALJ candidates to successfully execute our hearings reduction plan. In addition, the BBA increases the annual spending caps for program integrity purposes through FY 2021, as well as expands use of the cap adjustment funds to include cooperative disability investigation units and fraud prosecutions. The BBA also included critically important provisions to bolster the financing of the Social Security Disability Insurance Program (SSDI), ensuring that the program can continue to provide workers with serious disabilities and their families the full benefits they have earned. For a summary of all of the SSA provisions included in the BBA, please see our exhibit in the Limitations on Administrative Expenses technical materials.

### **❖ PROVIDING A SUPERIOR CUSTOMER EXPERIENCE**

A vast majority of the public continues to complete their business with us in person at a field office or with one of our customer service representatives on our National 800 Number, either out of necessity or preference. As such, we rely heavily on an adequate and experienced workforce to deliver timely and accurate service. With increasing workloads, it is critical to ensure sufficient funding for FY 17. Our online services and other self-service options have alleviated some of the pressure our frontline staff is facing, but much of the work we do to serve the public still requires human interaction.

#### ***Field Offices***

With more than 160,000 visitors on a daily basis, our more than 1,200 field offices nationwide are the cornerstone of our operation. As such, we remain committed to maintaining a field office structure for those customers who need or prefer face-to-face service. We were pleased to restore some of the field office hours that we previously reduced because of insufficient resources. Effective March 16, 2015, field offices nationwide opened for an additional hour every weekday except for Wednesday.

To improve efficiency in our field offices, we are focused on redirecting internet claims to 16 sites called Workload Support Units (WSU) to free up field office employee time for direct face-to-face service. These units processed approximately 84 percent of all internet retirement claims in FY 2015, which would have otherwise had to be processed by field office representatives. While internet retirement claims continue to be WSU's primary workload, we are building the capacity to increase their intake of internet disability claims.

We continue to expand our use of alternate methods of service delivery to our customers, such as video service, self-help computers, and express customer service stations while also providing high-quality face-to-face field office services for individuals who need or prefer them.

- *Video Service Delivery (VSD)*: The use of VSD is helping us balance workloads, save on travel costs, provide services to our deaf and hard of hearing population, and reduce customer wait times in busier field offices. VSD allows customers who live in remote locations to see a field office representative via live-streaming video. We have VSD units in 670 sites, and conducted approximately 130,000 interviews in FY 2015. Our next step is to explore more cost-efficient technology that will allow us to expand VSD to new locations.
- *Self-Help Personal Computers (SHPC)*: SHPC allows our customers to access our online services using computers located inside our field offices, enabling customers to complete some transactions without needing to speak with a representative. However, a field office representative is available to provide assistance, if necessary, to ensure customers complete their business. These stations now run on a virtual desktop infrastructure, which is more secure and cost efficient. Currently, SHPC is available in 790 field offices nationwide. In FY 2016, we plan to add 200 SHPCs in new or existing sites.
- *Social Security Express Desktop Icons*: These icons allow users to access most of our online services from a public computer or website. Available at external partner sites, such as libraries and senior centers, these icons offer the same services as the SHPCs in our field offices. In FY 2015, we designed and implemented a process allowing partner sites to download the desktop icon directly to a PC or website. Visits to Social Security Express through our icons more than tripled from 19,343 visits in FY 2014 to 61,470 visits in FY 2015.
- *Express Customer Service Stations*: Currently in the proof-of-concept (POC) phase, Customer Service Stations (CSS) offer customers a streamlined menu of service options geared towards the needs of individuals already conducting business in external partner locations (e.g., libraries and senior centers) or in our field offices. These stations support one-stop online access to some of Social Security's most popular quick online services – and improve service delivery for customer communities such as Veterans and those without home internet access. We currently have seven CSSs installed – one is in a Social Security field office and the other six are in external partner locations. This POC began on July 2, 2014 and is expected to continue through February 2017. After the POC ends, we will use the data collected to decide whether to move into a pilot expansion and potentially purchase additional units.

### ***National 800 Number***

Our National 800 Number allows customers to speak with a Social Security representative between 7 a.m. and 7 p.m. local time, Monday through Friday. The National 800 Number also offers a menu of automated services 24 hours a day.

The telephone agents we have across the country handle more than 2.6 million calls every month. Similar to the representatives who work in our field offices, the customer service representatives on our National 800 Number are knowledgeable of all the programs we administer, including Medicare and Medicaid, and customers rely heavily on this personal service to conduct business with us. As such, our National 800 Number faces similar challenges to our field offices in keeping pace with customer demand.



While we have worked diligently to improve National 800 Number service, the funding we received for FY 2016 will increase wait times and busy signals. With full funding of the FY 2017 Budget request, we will once again reverse the service deterioration on our National 800 Number, improving wait times from nearly 16 minutes at the end of FY 2016 to just over 11 minutes at the end of FY 2017. Busy signals will also improve from 9.5 percent at the end of FY 2016 to 7 percent by the end of FY 2017.

### ***Initial Disability Claims***

Our State DDSs make the time-intensive medical determinations for both initial disability claims and CDRs. While initial disability claims receipts have decreased since FY 2010, receipts are projected to increase again in FY 2016 and FY 2017. In FY 2015, the DDSs handled over 2.7 million initial disability claims while completing over 790,000 CDRs with the Budget Control Act level of program integrity funding. At the same time, our DDSs are keeping processing times relatively stable. With the FY 2017 President's Budget, we will increase the number of initial disability claim decisions by 4.3 percent from FY 2016. At the same time, we will significantly increase CDRs from 850,000 in FY 2016 to a record 1.1 million in FY 2017, and stay on track to eliminate the CDR backlog by the end of FY 2019.

*Health Information Technology (HIT):* We use an application that allows us to request, receive, and analyze electronic medical records in a fully automated manner using HIT. HIT automates the medical records request and receipt process, as well as gives adjudicators access to medical records within seconds of transmitting the request, as opposed to days or weeks. In FY 2015, over 6 percent of our initial disability claims received HIT medical records. Our FY 2017 goal is to increase HIT medical records to 11 percent of initial disability claims.

*Disability Case Processing System (DCPS):* DCPS will replace 54 independent legacy systems currently used throughout the DDS offices nationwide. The new system will allow for faster and more accurate case processing, reduce administrative costs, and provide structured data that will support our fraud analytics efforts. We plan to develop and deploy the core product to initial sites in FY 2016, adding additional functionality to process all types of disability cases throughout FY 2016 and FY 2017.

### **Hearings**

Our CARES plan presents a sustained, comprehensive, multiyear, and multi-layered approach for eliminating our hearings backlog. If we continue to receive adequate funding, and support from the Office of Personnel Management (OPM), we believe that through our innovative and engaging CARES plan, geared towards quality and people, we will facilitate the decrease in the backlog by FY 2017 and eliminate the hearings backlog by FY 2020. The CARES plan will reduce the current average wait time for a hearing decision from over 500 days currently to 270 days in FY 2020, and we expect to cut the number of pending cases in half.

Examples of initiatives currently underway in the CARES plan include:

- *Increased Staffing:* We will likely need to expand our hearings workforce by a few thousand employees between now and FY 2018, including 250 ALJs per year, if we are to eliminate the backlog by the end of FY 2020. In order to meet our hiring goals, we

need OPM to provide an adequate pool of ALJ candidates. OPM recently provided 50 additional candidates, but we need many more. The BBA included an important provision to ensure another exam will be administered this year, which is critical to ensuring an adequate pool of ALJs in future years. If we meet our hiring goals, we will increase our hearing decisions in FY 2017 to approximately 784,000, nearly 20 percent more than our FY 2015 levels, and begin to reduce pending levels.

- *National Adjudication Team*: This team allows our most experienced attorney advisors to issue fully favorable, on-the-record decisions, freeing up our ALJ resources to concentrate on the more complex cases that require hearings. These senior attorney adjudicators either reverse the DDS determination through an on-the-record decision or prepare an explanation as to why they were unable to reverse the determination.
- *Video Expansion and Improvement*: Expanding the use of video hearings will help us balance workloads across the country, reduce ALJ travel to remote sites, and offer claimants a more convenient and timely way to have their case heard. Currently, we hold more than 25 percent of hearings via videoconference. Our goal is to hold at least 170,000 hearings via video in FY 2016 and FY 2017.
- *Pre-Hearing Conference Pilot Program*: We implemented a program that allows senior attorneys to conduct pre-hearing conferences with unrepresented claimants. The purpose of the pilot is to reduce the number of delayed or rescheduled hearings by developing the record, explaining the hearing process to the claimant, and advising the claimant of his or her right to representation. Currently, more than 11 percent of scheduled hearings do not take place because claimants fail to appear or ask to postpone so they can seek representation.
- *Inline Quality Review*: Under this program, we conduct independent, random reviews to ensure that the laws, and our regulations and policies are applied equally and fairly to each individual who has filed a request for a hearing.
- *Contractor Access to eFolders*: Following the success of online services for representatives, we are developing a similar service for medical and vocational experts to access and view the electronic folder. A pilot is scheduled for release in April 2016. Additional functionality and national rollout are expected in December 2016.
- *Appointed Representative Services (ARS)*: ARS provides representatives with the ability to access their claimant's electronic folders via a secure SSA website. It also allows representatives to upload evidence and highlight pertinent information within the document. ARS reduces our costs for burning, encrypting, packaging, and mailing evidence on compact discs to representatives.
- *Electronic Bench Book (eBB)*: eBB allows ALJs and decision writers to perform pre-hearing file reviews and capture hearing notes. Post hearing, eBB guides the ALJ through each step of the sequential evaluation process while documenting the decisional instructions. Currently, ALJs are using eBB to process decisional instructions on 1,500 cases per week. A recent software release automatically generates a draft decisional notice.

### **Enhancing Online Customer Service**

In FY 2015, customers continued to increase their use of our online services to conduct business with us as they completed nearly 87 million transactions via our website. Customer satisfaction with our online services also continues to shine, as five of the top ten ranked federal websites were SSA online customer service products, according to the Foresee e-Government Report Card 2015. We will continue to enhance our online services and promote them as a safe and convenient service option to increase usage and reduce unnecessary field office visits. Our goal is to increase the volume of online transactions by 25 million each year, which would result in a total of 112 million transactions in FY 2016 and 137 million in FY 2017. With increased usage of online services, we can free-up more time for customers that need or prefer to complete business with us in person.

We are exploring and developing ways we can expand our online customer base. For example, we are enhancing *my Social Security* to include services for representative payees and to allow people with a foreign address to register. In addition, we are developing new customer engagement tools including Click-to-Chat, Click-to-Video, and a Message Center for relaying informational messages and promotional content to *my Social Security* users. Our 2015 releases of Dynamic Help and Click-to-Callback are also scheduled for enhancements. Expanding and enhancing our communication channels will allow customers to complete their online transactions within the method they prefer.

In November 2015, we released the internet Social Security Number Replacement Card (iSSNRC) application, which allows eligible customers to apply for their replacement SSN card online. Currently, we are slowly rolling out iSSNRC to a few States at a time but will continue releasing to additional States in the future.

Other services include adding an SSI application to the current iClaim process; and the development of a Smart Claim application that will allow our customers to file for retirement, disability, and Medicare within the same online service tool. We will later expand Smart Claim to include online service options for SSI claimants as well.

The internet appeals (iAppeals) application will allow customers to complete their non-medical appeals online; and we are developing applications to allow appointed representatives to complete all of their business via the internet, including expanding services at the initial claim level.

To promote our current and new online services, we use public service announcements on television, radio, printed leaflets, billboards, bus posters, displays in airport terminals, and social media. We also engage with the public on Facebook and Twitter, and we recently launched a new blog to enhance our social media outreach. We are collaborating with the Internal Revenue Service and TaxACT, a large tax preparation software company, to promote *my Social Security*.

### **Educate the Public about Social Security Programs**

We strive to educate the public, as well as our employees, about all the benefits and services we provide, to create a better customer experience. We are working with youth groups, faith-based groups, labor unions, and senior citizen and disability advocates to leverage their resources to reach both local and national audiences. At the end of FY 2016, we will deploy an employee

education program that will enable all of our employees to better understand and convey agency messages to those they meet, both at work and in their personal lives.

## ❖ **SUPPORTING OUR EXCEPTIONAL EMPLOYEES**

The level of service we provide to the public relies heavily on a workforce equipped with the knowledge, skill, and leadership to apply the complex rules of our programs. One of our greatest challenges is replacing the loss of our most experienced employees, especially in our current leadership ranks. More than 50 percent of our senior executives and 30 percent of our frontline supervisors are eligible to retire. Without leadership development and succession planning, this loss will result in both a lack of experience and institutional knowledge.

### **Employee Development and Engagement**

We plan to continue to invest in our employees by bolstering our leadership programs, offering opportunities to more employees, and continuing to offer and support mentoring opportunities, such as in our newly piloted National Mentoring Program.

Employee engagement is vital in recruitment, retention, and satisfaction. It can improve organizational performance while also contributing to individual performance. Therefore, it is paramount that we continue to promote an engaged and satisfied workforce and to improve our Federal Employment Viewpoint Survey scores on employee satisfaction.

### ***Altmeyer Building Renovation Project***

The well-being of our employees is also an agency priority, which includes, among other things, providing a work environment that is safe, comfortable, and energy efficient. As such, our budget request supports the renovation and repair of several office buildings to bring them up to current health and safety codes.

Our FY 2016 appropriation included \$150 million to fund the renovation of the Altmeyer Building on SSA's Woodlawn, MD main campus. The renovation includes full interior and exterior renovations of the existing building including infrastructure, electrical system, and space. The improved space utilization will create space for about 300 to 350 additional staff. We expect to award a contract for design services sometime in FY 2017 and estimate occupancy of the renovated building in FY 2021.

### **Succession Planning**

Our FY 2016-2018 Succession Plan promotes the assessment of competencies essential to leadership succession. The updated plan includes expanded training and developmental programs that support continual learning and close competency gaps. Organizational components will identify critical positions to serve as the foundation of the plan's strategies and activities. Our leaders will use the FY 2015-2024 *Retirement Wave Report* to make data-driven human capital and financial management decisions. This approach further enhances the goal of data-driven operations to ensure a continuation of a strong leadership pipeline of talent to meet the changing needs of our customers.

## ❖ MOVING FORWARD AS AN INNOVATIVE ORGANIZATION

Our investments in technology will allow us to obtain and use information in a more efficient manner, and provide fast and accurate service to our customers. This Budget request also supports our efforts to ensure the success of mission-critical projects and strengthens our investment planning for IT systems. In addition, this Budget reflects what we need to build and maintain effective cybersecurity programs.

### **Transforming the IT Investment Process**

We developed a new IT investment process that will provide a better way to select, track, and manage IT investments, as well as help us deliver the high quality IT services necessary to move the agency towards our Vision 2025 goals.

In FY 2015, we documented inefficiencies in our current IT investment process and began developing the framework for a new approach. The new process will focus on up-front project planning with outcomes tied to specific agency goals. Improved project planning and documentation will allow us to assess project costs and timelines with greater accuracy. An independent executive IT investment board will meet throughout the year to make informed funding decisions on projects that provide the greatest benefit to our agency's mission. As a result, we will be better able to deliver the right project on time and within budget, and provide the best tools for our employees and superior service to the American public.

### ***IT Modernization***

The database systems our agency uses today are 40 years old and are no longer the best solution to administer our programs. For several years, we worked to modernize our IT in small pieces at a time, but we have exhausted nearly all of these small efforts. We are now at a point where we must undertake a larger, multiyear effort.

The FY 2017 President's Budget requests multiyear funding of \$300 million, spread over four years, to undertake an IT modernization project that will bring our systems into the modern world. In FY 2017, \$60 million is included as part of the FY 2017 President's Budget. The FY 2017 President's Budget also contains a mandatory proposal for additional IT modernization funding - \$80 million each year in FYs 2018-2020. The project will require effort and investment in several areas including modernization in computer language, database, and infrastructure.

### ***Digital Services Team***

Our FY 2017 Budget request includes funding for staffing costs to build a Digital Services Team. We will recruit digital service experts from among America's leading technology enterprises and startups to help us effectively build and deliver important digital services. This team will focus on transforming our digital services with the greatest impact to citizens and businesses, making them easier to use and more cost-effective to build and maintain.

### ***Cybersecurity***

Our cybersecurity program continues to evolve our detection, protection, and intelligence capabilities for strengthening the agency's defenses against evolving threats and cyber-attacks. Our program incorporates these security capabilities into a comprehensive, multi-layered defensive approach for ensuring the confidentiality, integrity, and availability of the public's sensitive personal identifiable information. As we continue to provide new opportunities for better customer service through new online services, we must remain vigilant in continuing to strengthen our cybersecurity program capabilities.

Our cybersecurity program compares well against other Federal departments and agencies in key performance standards. To remain strong, we need to continue to evolve our cybersecurity program to reflect changes in technology, changes to business processes, and changes in the complexity of internal or external threats. Continued investments in cybersecurity projects and initiatives will ensure we have the resources needed to accomplish our agency's mission and thus maintain public confidence in the agency's ability to protect their privacy.

### **Establishing a Program Management Office**

We are implementing an Enterprise Program Management Office that will increase the opportunity for success of our mission-critical projects. Through the efforts of this new office, critical agency projects will have additional oversight and project management expertise, increasing the chance of project success.

### **Accelerating the Use of Data-Driven Decision Making**

Our new Analytics Center of Excellence (ACE) will execute analytical projects, develop agency advanced analytics capacity and capabilities, improve data sharing between intra-agency components, and co-operate with analytics practitioners to identify best practices and improve skills. We will continue to increase our use of data-driven decision making to improve quality and efficiencies in our business processes.

## **❖ ENHANCING PROGRAM INTEGRITY**

The American public expects and deserves for us to be outstanding stewards of the Social Security Trust Funds and general revenues that finance our programs – and as such, we are committed to ensuring that program rules and eligibility standards are fully enforced. The program integrity workloads we have in place help us make such determinations, which include conducting reviews to ensure beneficiaries are still entitled to benefits. We also work aggressively to prevent and detect fraud and recover improper payments whether fraudulent or not. While program integrity workloads consume valuable time and resources, we must continue to invest in these efforts to protect our programs.

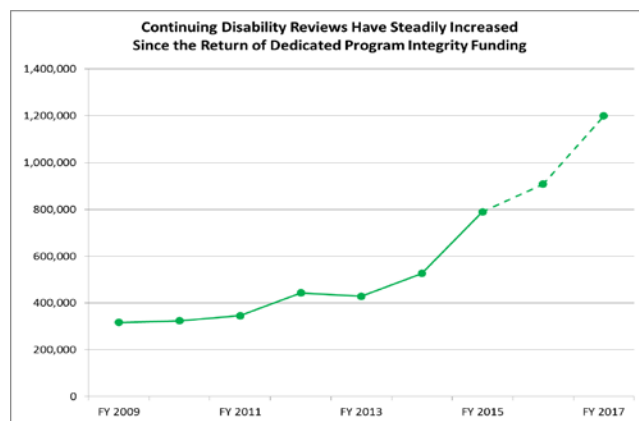
### **Program Integrity Workloads**

The program integrity work we perform saves billions of taxpayer dollars. CDRs and SSI redeterminations use a small investment of administrative funds to ensure that beneficiaries continue to meet the eligibility requirements to receive payments. However, annual appropriations bills have not always provided the full amount of funding for these activities.

Recently, recognizing the significant benefits to program activities, the BBA of 2015 increased authorized cap adjustments for these activities by a net \$484 million over the FY 2017 to FY 2021 period.

With the Budget Control Act program integrity funding provided to us in FY 2015, we exceeded our goal of 790,000 CDRs and 2.255 million SSI redeterminations by completing 799,000 CDRs and 2.267 redeterminations. The BBA increased such adjustments for Social Security programs by a net \$484 million over the FY 2017-2021 period. It also expanded the activities that may be funded by this funding source to include cooperative disability investigation units, and special attorneys for fraud prosecutions. In FY 2016, we will conduct 850,000 and 2.5 million, respectively. With our FY 2017 Budget request of \$13.067 billion, we will complete a record 1.1 million CDRs and 2.8 million redeterminations.

Current estimates indicate that medical CDRs conducted in FY 2017 will yield a return on investment (ROI) of about \$8 on average in net Federal program savings over 10 years per \$1 budgeted for dedicated program integrity funding. This ROI includes Old-Age, Survivors, and Disability Insurance (OASDI), SSI, Medicare, and Medicaid program effects. Similarly, we estimate that non-medical redeterminations conducted in FY 2017 will yield a ROI of about \$3 on average of net Federal program savings over ten years per \$1 budgeted for dedicated program integrity funding, including SSI and Medicaid program effects.



### Other Stewardship Activities

In addition to our key program integrity workloads, we have an aggressive strategy, through a variety of initiatives, to reduce improper payments and combat fraud. We recently established an Improper Payments Community of Practice to increase interagency collaboration and leverage ideas and best practices of other benefit-paying agencies. The Office of Anti-Fraud Programs (OAFP) is providing centralized oversight of and accountability for our efforts to prevent, deter, and detect fraud. OAFP increases our efficiency and enhances our ability to combat fraud by sharing knowledge, using data analytics and industry-standard business processes, and centralizing our deployment of training and communications. Our National Anti-Fraud Committee works with all of the Regional Anti-Fraud Committees to enhance existing fraud prevention efforts and implement new mitigation strategies, while also providing guidance and support to OAFP.

The FY 2017 President's Budget funds our stewardship initiatives such as:

- Continuing to expand our CDI program, which is highly successful at detecting fraud before we make a disability determination;

- Supporting our centralized fraud prevention units, which are comprised of disability examiners dedicated to reviewing and analyzing fraud cases;
- Strengthening and modernizing our representative payee program to ensure we appoint suitable representative payees for our beneficiaries and that representatives managing funds use these funds appropriately;
- Exploring data analytics to detect and prevent fraud by determining common characteristics and patterns of anomalous activity; and
- Improving death data processing by working to centralize and capture all death information in one system to prevent erroneous payments.

We will support reducing improper payments by continuing to use the Access to Financial Institutions (AFI) process. AFI, which is an electronic process that verifies bank account balances with financial institutions for purposes of determining SSI eligibility. The BBA expands the use of AFI and grants us the ability to verify financial information for all overpaid individuals (Title 2 or Title 16). The BBA requires the Commissioner to obtain an individual's authorization to obtain financial institution records before determining whether recovery of such individual's overpayment may be waived under the "defeats the purpose" provision. Additionally, in order to protect citizens who have been victims of identity theft, provide more secure authentication for our online services, and comply with Executive Order 13681, "Improving the Security of Consumer Financial Transactions," issued in October 2014, we are currently in the process of implementing multifactor authentication for *my Social Security* users. Multifactor authentication is a security process that requires more than a single method (e.g., user ID/password) to verify the user's identity. Initially, *my Social Security* users will need to also enter a code that is sent via text message to their cellphone as a second factor during registration and login. Following the initial implementation, we plan to enhance the service in FY 2017 to allow additional multifactor options as governed by NIST/OMB guidelines for customers. By offering more multi-factor options, we can improve usability and lower the chances of online fallout, thus helping us move towards the Agency goal to increase *my Social Security* usage.

## CONCLUSION

Full funding of the FY 2017 President's Budget will allow us to advance our efforts to improve service delivery and address critical priorities to provide a superior customer experience, sustain a workforce of exceptional employees, and move forward as an innovative organization.

This budget lays out a plan to address our most pressing problems and allows us to move closer to realizing our Vision 2025. Most notably, we will be able to fully execute our CARES plan to eliminate the hearings backlog by FY 2020 and eliminate our CDR backlog by the end of FY 2019.

For 80 years, we have provided caring and compassionate service to hardworking Americans and our most vulnerable citizens. As an economic lifeline for millions, we remain focused on making improvements to deliver timely and accurate services. We need continual support to stay on track and provide the service the public expects and deserves.



## **APPENDIX A – OUR EXTRAMURAL RESEARCH BUDGET**

In FY 2017, we are requesting \$58 million in new budget authority as part of our SSI appropriation to support extramural research projects. These projects will continue to test changes to the disability programs to improve program administration and reduce dependency on our programs. The broad-based SSI, OASI, and DI projects funded in this budget include projects in the areas of disability policy research, employment support programs, retirement policy research, financial literacy and education, and evaluations of proposed or newly enacted legislation.

Our FY 2017 budget request continues to support ongoing rigorous evaluations, such as our evaluation of the interagency Promoting Readiness of Minors in SSI (PROMISE) effort. The Departments of Education, Labor, and Health and Human Services created the PROMISE initiative to foster improved outcomes for children who receive SSI by facilitating positive changes in health status, physical and emotional development, completion of education and training, and eventually, employment opportunities. In addition to conducting surveys of participants, in FY 2017, we will conduct project site visits and produce site-specific process analyses.

The budget also includes continued funding for our Occupational Information System (OIS) project, which will allow us to make consistent, better-informed disability decisions. We often need information about work to make a disability determination, but the types of jobs in the workforce, as well as job requirements, change over time. The occupational resources we currently use to adjudicate claims have not been updated in more than 20 years. To support the development of new occupational data, we entered into an interagency agreement with the Department of Labor's Bureau of Labor Statistics (BLS). Starting in FY 2016 and continuing through FY 2018, BLS will collect occupational data related to the requirements of work. We expect to roll out the use of the new occupational data in stages and we are working to develop testing and training plans.

The Consolidated Appropriations Act, 2016, includes \$50 million in additional funding for our planned Early Intervention Demonstration. Early Intervention measures – such as supportive employment services for individuals with mental impairments– have the potential to achieve long-term gains in the employment and the quality of life of people with disabilities. By providing medical and vocational services prior to receiving benefits as part of the demonstration, we can test whether such services help individuals with these impairments remain active in the workforce, and perhaps avoid or delay a need for disability benefits. We anticipate awarding a contract for this project in FY 2016, and the project will continue through FY 2022. We will not need additional funding for this demonstration in FY 2017.

In FY 2017, we will continue to support the Benefit Offset National Demonstration and the new demonstration outlined in the BBA testing a benefit offset after an allowance for impairment-related work expenses. We are currently designing this demonstration and are still developing cost estimates and a project plan.

## APPENDIX B – FY 2017 LEGISLATIVE PROPOSALS – SUMMARIES

### Prevent Improper Payments and Improve Debt Collection

1. **Hold Fraud Facilitators Liable for Overpayments.** In a few recent high profile cases of fraud against SSA's disability programs, third parties, such as representatives and doctors, facilitated fraudulent applications for benefits by submitting false statements or evidence purporting to show that the individuals were disabled, when in fact some of those individuals had no disabling conditions. Under current law, such facilitators may be subject to criminal prosecution and penalties, but they are not required to repay the benefits improperly paid to a person who was not eligible for them. This proposal would hold fraud facilitators liable for overpayments by allowing SSA to recover the overpayment, with interest, from a third party if the third party was responsible for making fraudulent statement(s) or providing false evidence that allowed the beneficiary to receive payments they should not have received. Furthermore, a facilitator would be ineligible for a waiver of recovery of such an overpayment.
2. **Government-Wide Use of CBP Entry and Exit Data to Prevent Improper Payments.** The U.S. Customs and Border Protection (CBP) maintains data on when individuals enter and exit the United States. This entry and exit information may be useful in preventing improper payments in Federal programs, such as the Supplemental Security Income (SSI) program, that require U.S. residency to receive benefits. This proposal would provide for access to and use by federal agencies of CBP entry and exit data to prevent improper payments.
3. **Use the Death Master File to Prevent Federal Improper Payments.** SSA receives about 2.5 million reports of death each year from many sources, such as family members, funeral homes, financial institutions, and the States. SSA is authorized to share all of the death information it maintains with Federal and State agencies that administer Federally-funded benefits, State agencies administering State-funded programs, and Federal and State agencies using the information for statistical and research activities. Currently, the Department of the Treasury's (Treasury) Do Not Pay Portal only receives a limited file, which excludes State death information. This proposal would increase the amount of death information available to Federal agencies for use in preventing improper payments by authorizing SSA to share all of the death information it maintains with Do Not Pay.
4. **Authorize SSA to Conduct a New Continuing Disability Review when Fraud Is Involved in a Prior Continuing Disability Review.** SSA is required to redetermine an individual's entitlement to disability benefits if there is reason to believe that fraud or similar fault were involved in the individual's application for benefits. During this redetermination, SSA must disregard any evidence where there is reason to believe that fraud or similar fault were involved in the providing of such evidence. This proposal would apply a similar requirement if SSA believes that fraud or similar fault were involved in a prior continuing disability review (CDR). This proposal would authorize SSA to conduct immediately a new CDR to determine continuing eligibility if there is reason to believe that fraud or similar fault was involved in a prior CDR. During this review, SSA would be authorized to disregard any

evidence if there is reason to believe that fraud or similar fault was involved in the providing of such evidence.

5. **Authorize SSA to Use All Collection Tools to Recover Funds in Certain Scenarios, Such as When Someone Improperly Cashes a Beneficiary's Check or Removes a Benefit from a Joint Account.** Current law provides SSA only limited authority to recover certain incorrect payments that do not meet the statutory definition of an overpayment. Such incorrect payments include when someone improperly cashes a beneficiary's check or improperly removes benefit funds from a joint account after a beneficiary's death. For example, payments in excess of the amount due or paid after death are considered overpayments. Specifically, if a benefit payment of this nature is made to a joint account of the deceased worker and the other account holder is entitled to a spousal benefit, based on the deceased worker's record, it is considered an overpayment. However, if the other joint account holder is entitled to benefits on his/her own record or not entitled to benefits, the improper payment is deemed an incorrect payment; a designation which limits SSA's recovery tools. The Budget proposes a consistent treatment, deeming them both as overpayments and subjecting them to the same broader range of collection procedures. This proposal would authorize SSA to use all of its overpayment collection tools, such as credit bureau reporting and administrative wage garnishment, to recover these incorrect payments.
6. **Allow SSA to Use Commercial Databases to Verify Real Property Data in the SSI Program.** This proposal would reduce improper payments by authorizing SSA to conduct data matches with private commercial databases that maintain data on ownership of real property (i.e., land and buildings), which can be a countable resource for SSI beneficiaries. The proposal would authorize SSA to use that information to automatically determine eligibility for benefits, after proper notification. Beneficiaries would be required to consent to allow SSA to access these databases as a condition of benefit receipt. All other current due process and appeal rights would be preserved.
7. **Increase from \$10 to 10 Percent the Minimum Amount SSA Can Withhold from a Monthly Old-Age, Survivors, and Disability Insurance Benefits to Recover an Overpayment.** When a beneficiary receives more Old-Age, Survivors, and Disability Insurance (OASDI) benefits than he or she should have, SSA can recover this overpayment by reducing the beneficiary's monthly benefit going forward. Depending on the beneficiary's financial circumstances, SSA may decide to recover less than the full amount of the monthly benefit until the overpayment is repaid in full. However, SSA is required to recover at least \$10 per month. This proposal would require SSA to recover at least 10 percent of the monthly OASDI benefit when recovering an overpayment. The SSI program already uses the 10 percent rule to recover overpayments.
8. **Exclude SSA Debts from Discharge in Bankruptcy.** Debts due to an overpayment of OASDI or SSI benefits, and certain Medicare-related debts that SSA also collects, are generally dischargeable in bankruptcy. This proposal would exclude such debts from discharge in bankruptcy, except when it would cause an undue hardship.
9. **Lower Electronic Wage Reporting Threshold to Five Employees.** SSA processes W-2 forms for Treasury. Currently, Treasury requires businesses that file 250 or more W-2s per

calendar year to file electronically. This proposal would modify the Internal Revenue Code so that Treasury can require businesses that employ five or more employees to file electronically. This change would be phased-in over three years and would increase the efficiency and accuracy of this process, because electronic returns are completed more rapidly, and are generally more accurate, than scanned or keyed returns.

**10. Move from Annual to Quarterly Wage Reporting.** Employers report wages annually to SSA. However, from 1939 to 1977, SSA received wage reports on a quarterly basis. Increasing the frequency of wage reporting could enhance tax administration. More frequent reporting would also facilitate implementation of automated enrollment of employees in existing workplace pensions and be the foundation for the creation of a system of automatic workplace retirement accounts for workers who do not currently have access to a retirement plan. Furthermore, more frequent reporting may improve program integrity by providing timelier wage data for use by Federal, income-tested programs. This proposal would restructure the Federal wage reporting process by requiring employers to report wages on a quarterly basis<sup>1</sup>.

**11. Modify the treatment of certain debt referrals to the Treasury Offset Program:** The Budget proposal has two parts. First, the proposal would forgive a limited group of older debts that would have been impacted by implementation of the Food, Conservation, and Energy Act of 2008 provision (section 14219 of Public Law 110-246), which eliminated the prior 10-year statute of limitations for collection of legally enforceable, non-tax debts through TOP. This group includes debts from both former childhood beneficiaries and others. For similar debts that would not have been immediately impacted by the implementation of the regulation, SSA will continue to consider forgiveness on a case-by-case basis using its existing administrative authority. Second, going forward SSA will only be able to refer debts for former childhood beneficiaries to TOP if SSA has initiated collections within 10 years of an overpayment being incurred. This is intended to ensure that individuals are not surprised by a TOP collection that occurs years after a debt was incurred when individuals may have difficulty remembering the circumstances of the error.

The Budget proposals ensure that the Administration maintains its commitment to reducing improper payments, while preventing former debtors from being surprised by the abrupt seizure of their tax refunds, sometimes decades after the original overpayments were made. While Congress considers the legislative proposals, SSA will begin the gradual process of restarting TOP referrals for those debts not impacted by the Administration's proposals.<sup>2</sup>

**12. Strengthening Child Support Enforcement and Establishment.** SSA reduces a child's monthly SSI benefit by up to two thirds of any monthly child support payment he or she also receives. The President's Budget includes several proposals aimed at increasing and

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<sup>1</sup> This proposal would have no effect on the reporting of self-employment income.

<sup>2</sup> The budget assumes the proposal costs \$50 million over 10 years. The Office of the Chief actuary is working on a detailed estimate of this proposal.

improving child support collections and program efficiency. By increasing the amount of child support collected, these proposals would result in savings to the SSI program.

## **Improve Efficiency**

- 13. Improve Collection of Pension Information and Transition after ten years to an Alternative Approach based on Years of Non-Covered Earnings.** Current law requires SSA to reduce OASDI benefits when someone also receives a pension based on work that was not covered by Social Security. SSA currently has a matching agreement with the Office of Personnel Management (OPM) to obtain information on Federal government retirees who receive a pension from work not covered by Social Security. However, SSA generally lacks a way to receive similar information from State and local governments. As a result, many of these pensions go unreported, leading to improper payments. The Budget re-proposes legislation that would improve reporting for non-covered pensions by including up to \$70 million for administrative expenses, \$50 million of which would be available to the States, to develop a mechanism so that the Social Security Administration could enforce the offsets for the Windfall Elimination Provision (WEP) and Government Pension Offset (GPO). This proposal would require State and local government pension payers to report information on pensions paid for non-covered work to SSA through an automated data exchange. In addition, the Budget proposes to transition after ten years to an alternative approach, which would adjust Social Security benefits based on the extent to which workers have non-covered earnings. SSA now collects data on non-covered employment and could calculate the offset without any disclosure from the individual.
- 14. Establish Workers' Compensation Information Reporting.** Current law requires SSA to reduce an individual's Disability Insurance (DI) or SSI benefit if he or she receives workers' compensation (WC) or public disability benefits (PDB). SSA currently relies upon beneficiaries to report when they receive these benefits. This proposal would improve efficiency and program integrity by requiring States, local governments, and private insurers that administer WC and PDB to provide this information to SSA. Furthermore, this proposal would also provide for the development and implementation of a system to collect this information from States, local governments, and insurers.
- 15. Eliminate Dedicated Accounts.** Under current law, if the retroactive SSI benefits due a child exceed six times the maximum monthly SSI benefit, plus any optional State SSI supplement, then SSA must deposit the benefits into a special account, called a "dedicated account." The child's representative payee—who is typically a parent—can expend funds from such an account only for education, health care, and certain other expenses. These restrictions are often considered intrusive and confusing, and oversight of these accounts is labor-intensive for both SSA and representative payees. This proposal would eliminate dedicated accounts.
- 16. Provide Mandatory Funding Dedicated to Modernizing SSA's Information Technology.** This proposal would provide SSA with \$240 million in mandatory funding over fiscal years 2018, 2019, and 2020 dedicated to modernizing SSA's information technology (IT), specifically its core databases, programming languages, and IT infrastructure. These systems are becoming antiquated, and the staff experienced in maintaining these systems are

approaching retirement and are difficult to replace. SSA would use the proposed funds to invest in complex, multi-year IT projects necessary to update these systems in accordance with modern design principles.

### **Improve Benefits and Promote Work Opportunity**

- 17. Extend SSI Time Limits for Qualified Refugees.** Refugees and certain other humanitarian immigrants who are disabled or elderly are potentially eligible for SSI benefits for up to seven years from the date they attained their immigration status, and without time limit if they become naturalized. Congress acknowledged that humanitarian immigrants might be unable to attain citizenship within the seven-year period of SSI eligibility, even if they apply for naturalization as soon as they are eligible. Accordingly, Congress temporarily extended the time-limited SSI eligibility period from seven years to nine years for fiscal years 2009-2011. However, effective October 2011, the SSI eligibility period for refugees and other humanitarian immigrants reverted to seven years. This proposal would underscore the nation's commitment to refugees, asylees, and other humanitarian immigrants—who come to America with very little and frequently have nowhere else to go—by again extending the time limit from seven to nine years during fiscal years 2017 and 2018.
- 18. Conform Treatment of State and Local Government Earned Income Tax Credits and Child Tax Credits for SSI.** When determining someone's eligibility for, and benefit amounts under, the SSI program, SSA excludes Federal earned income tax credits (EITC) and child tax credits (CTC). However, the law requires SSA to count State EITCs and CTCs for SSI purposes. This proposal would simplify administration of the SSI program by excluding State EITCs and CTCs, in the manner in which similar, Federal tax payments are excluded.
- 19. Terminate Step Child Benefits in the Same Month as His or Her Parent's Benefits Terminate.** A parent and stepchild may receive benefits on the record of a worker, but if the marriage terminates by divorce, they are no longer eligible for benefits. When a stepchild's parent is divorced, spousal benefits terminate in the month before the month of the final divorce. However, benefits for the stepchild terminate one month later, in the month of the final divorce. This proposal would fix this discrepancy by ending benefits for the stepchild in the same month as the parent, in the month before the final divorce.
- 20. Create an Interagency Coordinating Council on Workforce Attachment.** This proposal would create and fully fund an interagency council comprising Federal agencies involved in improving the well-being of people with health impairments and disabilities, including the Office of Management and Budget; the Departments of Education, Health and Human Services, Labor, and the Treasury; and the Social Security Administration. The council's mission would be to improve workforce attachment for people with health impairments and disabilities, and its duties would include developing and maintaining a strategic plan to improve work outcomes, evaluating and recommending improvements to Federal programs, designing and overseeing demonstration projects, and improving interagency coordination.

## SOCIAL SECURITY ADMINISTRATION

### FY 2017 PRESIDENT'S BUDGET

#### Key Tables

**Table i.1 - Summary Table of SSA's Appropriation Request**

FY 2017	FTE	Amount
Payments to Social Security Trust Funds		\$ 11,400,000
Supplemental Security Income Program	--	--
FY 2017 Request	--	\$ 43,824,868,000 <sup>1</sup>
FY 2018 First Quarter Advance	--	\$ 15,000,000,000
Limitation on Administrative Expenses	66,140 <sup>2</sup>	\$ 13,067,000,000 <sup>3</sup>
Office of the Inspector General	560	\$ 112,000,000

<sup>1</sup> Excludes \$14,500,000,000, previously appropriated as a first quarter advance for FY 2017.

<sup>2</sup> Figure includes workyears for LAE, reimbursable work, LIS, SCHIP. Excludes workyears associated with Medicare Access and CHIP Reauthorization Act of 2015 funding.

<sup>3</sup> Includes \$126,000,000 for SSI State Supplementary user fees and up to \$1,000,000 for non-attorney user fees.

**Table i.2 – Administrative Budget Authority and Other Planned Obligations<sup>1</sup> (in millions)**

	<b>FY 2015 Actual</b>	<b>FY 2016 Enacted</b>	<b>FY 2017 Estimate</b>	<b>Change FY 16/FY 17</b>
<b><u>Budget Authority</u></b>				
Base Limitation on Administrative Expenses (LAE)	\$10,285	\$10,599	\$11,121	\$522
Program Integrity Base Level	\$273	\$273	\$273	\$0
Program Integrity Cap Adjustment	\$1,123	\$1,153	\$1,546	\$393
User Fees <sup>2</sup>	\$125	\$137	\$127	-\$10
<b>Subtotal, LAE Appropriation</b>	<b>\$11,806</b>	<b>\$12,162</b>	<b>\$13,067</b>	<b>\$905</b>
Percent change from FY 2016				7.44%
Research	\$83	\$101	\$58	-\$43
Office of the Inspector General (OIG)	\$103	\$106	\$112	\$6
<b>Subtotal, Budget Authority</b>	<b>\$11,992</b>	<b>\$12,369</b>	<b>\$13,237</b>	<b>\$868</b>
Percent change from FY 2016				7.02%
<b><u>Other Planned Obligations</u></b>				
No-year Information Technology	\$438	\$180	\$125	-\$55
MIPPA – Low-Income Subsidy (LIS)	\$0	\$6	\$6	\$0
Medicare Access and Chip	\$0	\$5	\$5	\$0
Reauthorization Act of 2015 (MACRA)				
Recovery Act <sup>3</sup>				
Workload Processing	\$0	\$0	\$0	\$0
Economic Recovery Payments	\$0	\$0	\$0	\$0
National Computer Center	\$43	\$53	\$0	-\$53
OIG Oversight	\$0	\$0	\$0	\$0
<b>Subtotal, Other Planned Obligations</b>	<b>\$481</b>	<b>\$244</b>	<b>\$136</b>	<b>-\$108</b>
<b>TOTAL BUDGET AUTHORITY AND PLANNED OBLIGATIONS</b>	<b>\$12,473</b>	<b>\$12,613</b>	<b>\$13,373</b>	<b>\$760</b>

<sup>1</sup> Totals may not equal sums of component parts due to rounding.

<sup>2</sup> Includes SSI user fees and Social Security Protection Act user fees.

<sup>3</sup> Funds provided in the American Recovery and Reinvestment Act of 2009 (Recovery Act) (P.L. 111-5).



**Table i.3 – SSA Full Time Equivalents and Workyears**

	<b>FY 2015 Actual</b>	<b>FY 2016 Estimate</b>	<b>FY 2017 Estimate</b>	<b>Change FY 16/FY 17</b>
SSA Full Time Equivalents <sup>1</sup>	63,394	64,860	66,140	1,280
SSA Overtime/Lump Sum Leave	3,077	972	2,498	1,526
<b>Subtotal, SSA Workyears</b>	<b>66,471</b>	<b>65,832</b>	<b>68,638</b>	<b>2,806</b>
Disability Determination Services	14,925	15,270	16,000	730
<b>Subtotal, SSA and DDS Workyears</b>	<b>81,396</b>	<b>81,102</b>	<b>84,638</b>	<b>3,536</b>
OIG Full Time Equivalents	528	540	560	20
OIG Overtime/Lump Sum Leave	5	3	4	1
<b>Subtotal, OIG Workyears</b>	<b>533</b>	<b>543</b>	<b>564</b>	<b>21</b>
<b>TOTAL SSA/DDS/OIG WORKYEARS</b>	<b>81,929</b>	<b>81,665</b>	<b>85,202</b>	<b>3,557</b>

<sup>1</sup> Excludes workyears associated with Medicare Access and CHIP Reauthorization Act of 2015 funding

Table i.4 – SSA Outlays by Program (in millions)

	FY 2015 Actual	FY 2016 Estimate	FY 2017 Estimate	Change FY 16/FY 17
<b><u>Trust Fund Programs</u></b>				
Old-Age and Survivors Insurance (OASI)	\$741,461	\$779,476	\$820,022	\$40,546
Disability Insurance (DI)	\$146,306	\$150,010	\$152,678	\$2,668
<b>Subtotal, Trust Fund Programs</b>	<b>\$887,767</b>	<b>\$929,486</b>	<b>\$972,700</b>	<b>\$43,214</b>
<b><u>Proposed OASDI Legislation:</u></b>				
Increase Minimum Overpayment Withholding	\$0	\$0	-\$8	-\$8
Exclude Debts from Discharge in Bankruptcy	\$0	\$0	-\$9	-\$9
<b>Subtotal, Proposed OASDI Legislation</b>	<b>\$0</b>	<b>\$0</b>	<b>-\$17</b>	<b>-\$17</b>
<b>Medicare Access and Chip Reauthorization Act of 2015 (MACRA)</b>	<b>\$0</b>	<b>\$5</b>	<b>\$5</b>	<b>\$0</b>
<b><u>General Fund Programs</u></b>				
Supplemental Security Income (SSI)	\$58,901	\$64,675	\$61,624	-\$3,051
Special Benefits for Certain World War II	\$3	\$4	\$3	-\$1
Recovery Act: National Support Center	\$63	\$47	\$44	-\$3
<b>Subtotal, General Fund Programs</b>	<b>\$58,967</b>	<b>\$64,726</b>	<b>\$61,671</b>	<b>-\$3,055</b>
<b><u>Proposed General Fund Legislation:</u></b>				
SSI Refugee Extension	\$0	\$0	\$44	\$44
WEP/GPO Enforcement	\$0	\$0	\$70	\$70
W/C Enforcement	\$0	\$0	\$10	\$10
Federal Wage Reporting	\$0	\$0	\$140	\$140
Eliminate Dedicated Accounts	\$0	\$0	\$5	\$5
Verify Real Property Data	\$0	\$0	-\$12	-\$12
Strengthen Child Support Enforcement	\$0	\$0	-\$3	-\$3
<b>Subtotal, Proposed General Fund Legislation</b>	<b>\$0</b>	<b>\$0</b>	<b>\$254</b>	<b>\$254</b>
<b>TOTAL SSA Outlays, Current Law</b>	<b>\$946,734</b>	<b>\$994,217</b>	<b>\$1,034,376</b>	<b>\$40,159</b>
Percent change from FY 2015				4.04%
<b>TOTAL SSA Outlays, Proposed Law</b>	<b>\$0</b>	<b>\$0</b>	<b>\$237</b>	<b>\$237</b>
<b>TOTAL SSA Outlays, Current &amp; Proposed Law</b>	<b>\$946,734</b>	<b>\$994,217</b>	<b>\$1,034,613</b>	<b>\$40,396</b>

**Table i.5 – Current Law- OASDI Outlays and Income (in millions)**

	<b>FY 2015 Actual</b>	<b>FY 2016 Estimate</b>	<b>FY 2017 Estimate</b>	<b>Change FY 16/FY 17</b>
<b><u>Outlays</u></b>				
OASI Benefits	\$ 733,713	\$ 771,988	\$ 812,596	\$ 40,608
DI Benefits	\$ 142,846	\$ 146,448	\$ 149,215	\$ 2,767
Other <sup>1</sup>	\$ 11,208	\$ 11,050	\$ 10,889	-\$ 161
<b>TOTAL OUTLAYS, Current Law</b>	<b>\$ 887,767</b>	<b>\$ 929,486</b>	<b>\$ 972,700</b>	<b>\$ 43,214</b>
<b><u>Income</u></b>				
OASI <sup>2</sup>	\$795,335	\$789,363	\$806,719	\$17,356
DI	\$118,039	\$148,391	\$165,051	\$16,660
<b>TOTAL INCOME, Current Law</b>	<b>\$913,374</b>	<b>\$937,754</b>	<b>\$971,770</b>	<b>\$34,016</b>

**Table i.6 – Current Law- OASDI Beneficiaries and Average Benefit Payments (in thousands)**

	<b>FY 2015 Actual</b>	<b>FY 2016 Estimate</b>	<b>FY 2017 Estimate</b>	<b>Change FY 16/FY 17</b>
<b><u>Average Number of Beneficiaries</u></b>				
OASI	48,338	50,060	51,766	1,706
DI	10,899	10,888	11,006	118
<b>TOTAL BENEFICIARIES</b>	<b>59,237</b>	<b>60,948</b>	<b>62,772</b>	<b>1,824</b>
<b><u>Average Monthly Benefit</u></b>				
Retired Worker	\$ 1,326	\$ 1,346	\$ 1,369	\$ 23
Disabled Worker	\$ 1,160	\$ 1,166	\$ 1,176	\$ 10
Projected COLA Payable in January	1.7%	0.0%	0.8%	0.8%

<sup>1</sup> “Other” includes SSA & non-SSA administration expenses, beneficiary services, payment to the Railroad Retirement Board, and demonstration projects.

<sup>2</sup> The FY 2016 SECA number does not match the MAX input, which contained an incorrect transposition.

**Table i.7 – Current Law- Supplemental Security Income Outlays<sup>1</sup> (in millions)**

	<b>FY 2015 Actual</b>	<b>FY 2016 Estimate</b>	<b>FY 2017 Estimate</b>	<b>Change FY 16/FY 17</b>
Federal Benefits <sup>2</sup>	\$54,647	\$59,610	\$56,166	-\$3,444
Other <sup>3</sup>	\$4,256	\$4,852	\$5,458	\$606
<b>Subtotal, Federal Outlays</b>	<b>\$58,903</b>	<b>\$64,462</b>	<b>\$61,624</b>	<b>-\$2,838</b>
State Supplementary Benefits	\$2,632	\$2,870	\$2,680	-\$190
State Supplementary Reimbursements	-\$2,634	-\$2,657	-\$2,680	-\$23
<b>Subtotal, Net State Supplementary Payments<sup>4</sup></b>	<b>-\$2</b>	<b>\$213</b>	<b>\$0</b>	<b>-\$213</b>
<b>TOTAL OUTLAYS, Current Law</b>	<b>\$58,901</b>	<b>\$64,675</b>	<b>\$61,624</b>	<b>-\$3,051</b>

<sup>1</sup> Totals may not equal sums of component parts due to rounding.

<sup>2</sup> There are 12 payments per year in FY 2015 and FY 2017. There are 13 payments in FY 2016.

<sup>3</sup> “Other” includes beneficiary services, research, administrative costs and \$2M for Special Immigrant Visa in FY 2017.

<sup>4</sup> States must reimburse SSA in advance for State Supplementary Payments. There will always be 12 state reimbursements in each fiscal year, but there can be 11, 12, or 13 benefit payments per fiscal year because a monthly payment is advanced into the end of the previous month anytime the due date falls on a weekend or holiday. Hence, the “Net State Supplementary Payment” numbers vary from year-to-year depending on the timing of the October benefit payments at the beginning and end of each fiscal year.

**Table i.8 – SSI Recipients and Benefit Payments<sup>1</sup> (Recipients in thousands)**

	<b>FY 2015 Actual</b>	<b>FY 2016 Estimate</b>	<b>FY 2017 Estimate</b>	<b>Change FY 16/FY 17</b>
<b><u>Average Number of SSI Recipients</u></b>				
Federal Recipients				
Aged	1,100	1,106	1,111	5
Blind or Disabled	7,073	7,113	7,126	13
<b>SUBTOTAL, FEDERAL RECIPIENTS</b>	<b>8,173</b>	<b>8,219</b>	<b>8,237</b>	<b>18</b>
State Supplement Recipients (with no Federal SSI payment)	171	170	173	3
<b>TOTAL SSI RECIPIENTS, Current Law</b>	<b>8,344</b>	<b>8,389</b>	<b>8,410</b>	<b>21</b>
<i>SSI Federal Recipients Concurrently Receiving OASDI Benefits (included above)</i>				
	2,614	2,629	2,636	7
<b><u>Average Monthly Benefit</u></b>				
Aged	\$ 390	\$ 396	\$ 402	\$ 6
Blind and Disabled	\$ 576	\$ 580	\$ 586	\$ 6
<b>AVERAGE, All SSI Recipients</b>	<b>\$ 551</b>	<b>\$ 556</b>	<b>\$ 561</b>	<b>\$ 5</b>
Projected COLA Payable in January	1.7%	0.0%	0.8%	0.8%

<sup>1</sup> Totals may not equal sums of component parts due to rounding

**Table i.9 – Special Benefits for Certain WWII Veterans Overview**  
(Outlays in millions)

	<b>FY 2015 Actual</b>	<b>FY 2016 Estimate</b>	<b>FY 2017 Estimate</b>	<b>Change FY 16/FY 17</b>
Federal Benefits	\$ 3	\$ 3	\$ 2	-\$ 1
Administration	\$ 0 <sup>1</sup>	\$ 1	\$ 1	\$ 0
<b>TOTAL OUTLAYS</b>	<b>\$ 3</b>	<b>\$ 4</b>	<b>\$ 3</b>	<b>-\$ 1</b>
Average Number of Beneficiaries (in thousands)	1	1	0 <sup>2</sup>	-1
Average Monthly Benefit	\$ 341	\$ 378	\$ 380	\$ 2

<sup>1</sup> Less than \$500,000.

<sup>2</sup> Estimated average number of recipients less than 500.

**Table i.10 – Administrative Outlays as a Percent of  
Trust Fund Income and Benefit Payments - FY 2017**

	<b>Percent of Income</b>	<b>Percent of Benefit Payments</b>
OASI	0.3%	0.3%
DI	1.8%	2.0%
OASDI (combined)	0.6%	0.6%
SSI (Federal and State)	N/A	9.2%
<b>TOTAL SSA <sup>1</sup></b>		<b>1.3%</b>

<sup>1</sup> Includes Hospital Insurance (HI) and Supplemental Medical Insurance (SMI) administrative outlays. SSA's calculation of discretionary administrative expenses excludes Treasury Administrative expenses which are mandatory outlays."

**Table i.11 – Tax Rates, Wage Base and Economic Assumptions**

	<b>CY 2015</b>	<b>CY 2016</b>	<b>CY 2017</b>	<b>Change CY 16/CY 17</b>
<b><u>Employer/Employee Rates (each)</u></b>				
OASDI (Social Security)	6.20%	6.20%	6.20%	0.0%
Hospital Insurance (HI) (Medicare)	1.45%	1.45%	1.45%	0.0%
<b>EMPLOYEE TOTAL</b>	<b>7.65%</b>	<b>7.65%</b>	<b>7.65%</b>	<b>0.0%</b>
<b><u>Self-Employment Rates</u></b>				
OASDI (Social Security)	12.40%	12.40%	12.40%	0.0%
HI (Medicare)	2.90%	2.90%	2.90%	0.0%
<b>TOTAL</b>	<b>15.30%</b>	<b>15.30%</b>	<b>15.30%</b>	<b>0.0%</b>
<b><u>Cost of Living Adjustments (COLAs)</u></b>				
January	1.7%	0.0%	0.8%	0.8%
<b><u>Contribution and Benefit Base</u></b>				
OASDI	\$ 118,500	\$ 118,500	\$ 126,000 <sup>1</sup>	\$ 7,500
HI	(no cap)	(no cap)	(no cap)	
<b><u>Annual Retirement Test</u></b>				
Year Individual Reaches Full Retirement Age	\$ 41,880	\$ 41,880	\$ 44,520 <sup>1</sup>	\$ 2,640
Under Full Retirement Age	\$ 15,720	\$ 15,720	\$ 16,680 <sup>1</sup>	\$ 960
<b><u>Wages Required for a Quarter of Coverage</u></b>	<b>\$ 1,220</b>	<b>\$ 1,260</b>	<b>\$ 1,290<sup>1</sup></b>	<b>\$ 30</b>

<sup>1</sup> Estimate.



**Table i.12 – Selected Performance Measures**

	<b>FY 2015 Actual</b>	<b>FY 2016 Enacted<sup>1</sup></b>	<b>FY 2017 Request</b>
<b><u>Selected Workload Measures</u></b>			
Retirement and Survivors Claims Completed (thousands)	5,327	5,586	5,732
Initial Disability Claims Completed (thousands)	2,759	2,695	2,810
Disability Reconsiderations Completed (thousands)	723	702	715
Hearings Completed (thousands)	663	703	784
National 800 Number Calls Handled (millions)	37	34	38
Average Speed of Answer (ASA) (seconds)	617	945	675
Agent Busy Rate (ABR)	7.5%	9.5%	7.0%
Social Security Numbers Completed (millions)	16	16	16
Annual Earnings Items Completed (millions)	266	264	265
Social Security Statements Issued (millions) <sup>2,3</sup>	50	38	44
<b><u>Selected Outcome Measures</u></b>			
Initial Disability Claims Receipts (thousands)	2,756	2,807	2,817
Hearings Receipts (thousands)	746	730	729
Initial Disability Claims Pending (thousands)	621	733	740
Disability Reconsiderations Pending (thousands)	144	136	137
Hearings Pending (thousands)	1,061	1,087	1,033
Average Processing Time for Initial Disability Claims (days)	114	113	113
Average Processing Time for Disability Reconsiderations (days) <sup>4</sup>	113	N/A	109
Annual Average Processing Time for Hearings Decisions (days)	480	540	555
Disability Determination Services Production per Workyear	307	307	314
Office of Disability Adjudication and Review Production per Workyear	95	94	98
Other Work/Service in Support of the Public - Annual Growth of Backlog (workyears)	N/A	(2,000)	(2,700)
<b><u>Selected Program Integrity Performance Measures</u></b>			
Periodic Continuing Disability Reviews (CDRs) Completed (thousands)	1,972	1,950	2,200
Full Medical CDRs (included above, thousands)	799	850	1,100
Supplemental Security Income Non-Disability Redeterminations Completed (thousands)	2,267	2,522	2,822

<sup>1</sup> FY 2016 is a 53-week year for management information purposes. After the close of the year, we will report both 52 and 53-week actual performance data. Our budgeted performance goals are full-year goals based on the workyears we are able to support with funds available in FY 2016.

<sup>2</sup> The Social Security Statements Issued measure includes paper statements only; does not include electronic statements issued.

<sup>3</sup> The original estimate for Social Security Statements (SSS) Issued measure in FY 2016 President's Budget was 45 million. This has been reduced by ~6.6 million, as a result of the agency sending out the scheduled SSS for FY 2016 October in FY 2015 September. Therefore, the FY 2016 Enacted number has been adjusted to ~38 million.

<sup>4</sup> We developed management information for Average Processing Time for Disability Reconsiderations in FY 2013. FY 2014 was the first full fiscal year for which data was available for this measure. Now that we have had the opportunity to analyze at least two years of actual data, this year we developed a performance target for FY 2017.

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## APPROPRIATION LANGUAGE

### PAYMENTS TO SOCIAL SECURITY TRUST FUNDS

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For payment to the Federal Old-Age and Survivors Insurance Trust Fund and the Federal Disability Insurance Trust Fund, as provided under sections 201(m)[, 228(g),] and 1131(b)(2) of the Social Security Act, \$11,400,000.<sup>1</sup> (*Departments of Labor, Health and Human Services, and Education, and Related Agencies Appropriations Act, 2016.*)

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<sup>1</sup> Social Security checks, like those issued by other federal agencies, are negotiable for only 12 months from their date of issue. Under the "Limited Payability" procedure, the value of unnegotiated checks issued on or after October 1, 1989 are credited directly to the trust funds from Treasury's general fund when the checks are canceled. These funds do not pass through the Payments to Social Security Trust Funds account, but the interest adjustments do pass through this account.

Section 1131 of the Social Security Act requires the Commissioner of Social Security to furnish information regarding deferred vested pension rights to pension plan participants (and their dependents or survivors). It permits the administrative expenses of carrying out this pension reform work to be funded initially from the OASI Trust Fund through SSA's Limitation on Administrative Expenses and authorizes an annual appropriation of federal funds to reimburse the OASI Trust Fund.

## GENERAL STATEMENT

The Payments to Social Security Trust Funds (PTF) account provides federal fund payments to the Social Security trust funds for several distinct activities. The purpose of each requested payment is to put the trust funds in the same financial position they would have been in had they not borne the cost of certain benefits or administrative expenses chargeable to general revenues. This account includes payments requiring an annual appropriation and payments made to the trust funds under permanent indefinite authority.

## ANNUAL APPROPRIATION

The annual PTF appropriation provides reimbursement to the Social Security trust funds for non-trust fund activities. These activities include pension reform and interest on unnegotiated checks<sup>1</sup>. Listed below is the estimated annual appropriation and resulting obligations for FY 2017.

**Table 1.1—Annual Appropriation and Obligations**

	<b>FY 2015 Actual</b>	<b>FY 2016 Enacted</b>	<b>FY 2017 Estimate</b>	<b>FY16 to FY17 Change</b>
<b>Appropriation</b>	\$ 16,400,000	\$ 11,400,000	<b>\$ 11,400,000</b>	<b>\$ 0</b>
<b>Obligations</b>	\$ 3,870,255	\$ 11,450,000	<b>\$ 11,450,000</b>	<b>\$ 0</b>

## PERMANENT INDEFINITE AUTHORITY

Amounts not subject to the annual appropriation include: (1) receipts from federal income taxation of Social Security benefits, (2) Federal Insurance Contribution Act (FICA) and Self-Employment Contribution Act (SECA) tax credits, (3) reimbursement for federal employee union administrative expenses, (4) transfers to offset the financial effects of the Food, Conservation, and Energy Act of 2008, and (5) reimbursements for the loss in FICA tax revenue resulting from the payroll tax holiday provided by the Tax Relief, Unemployment Insurance Reauthorization, and Job Creation Act of 2010 and extended by the Temporary Payroll Tax Cut Continuation Act of 2011. The permanent appropriation provides that the trust funds are credited for each of these revenue items.

### Taxation of Social Security Benefits

The Social Security Amendments of 1983 provide for taxation of up to one-half of Social Security benefits in excess of certain income thresholds. The Omnibus Reconciliation Act of

<sup>1</sup> This account used to include the quinquennial adjustment for military service wage credits that was authorized to be appropriated every five years. Section 842 of the Bipartisan Budget Act, 2015 (Public Law 114–74) amends section 217(g)(2) of the Social Security Act ending trust fund/general fund Quinquennial Military Service Credit adjustments effective retroactively to 2010, the date of the last such adjustment.

1993, P.L. 103-66, amended this provision so that up to 85 percent of benefits could be subject to taxation. The additional amounts collected from this 1993 provision are paid to the Hospital Insurance Trust Fund; no additional income is due the Social Security trust funds as a result of the enactment of the 1993 law.

The taxes are collected as federal income taxes; subsequently, an equivalent payment to the Social Security trust funds is made from the general funds of the Treasury. Transfers of estimated aggregate tax liabilities arising from Social Security benefits of U.S. citizens are made quarterly and then adjusted as actual receipts are known. The estimated income from these taxes is \$32,383 million in FY 2016 and \$39,007 million in FY 2017 from U.S. citizens; the monthly transfer of taxes imposed on aliens are transferred monthly and will generate estimated income of \$203 million in FY 2016 and \$214 million in FY 2017. The estimates for taxation of benefits reflect normal growth related to benefit levels and the beneficiary population.

Section 733 of the Uruguay Round Agreements Act, P.L. 103-465, also increased the taxable portion of nonresident aliens' Social Security benefits from 50 percent to 85 percent. The Offices of the General Counsel at SSA and at the Centers for Medicare and Medicaid Services, Department of Health and Human Services, agreed that the additional income resulting from the law should go to the OASDI trust funds as opposed to the HI trust fund.

#### **FICA and SECA Tax Credits**

The Social Security Amendments of 1983 also provided for the granting of FICA and SECA tax credits to individuals. The tax credits are granted at the time the individual is taxed and are funded by the general funds of the Treasury through reimbursement to the trust funds. The FICA tax credit applies only to wages earned in calendar year 1984. The SECA tax credit applies from calendar year 1984 through calendar year 1989. There are small periodic adjustments made due to tax credits being applied retroactively.

#### **Reimbursement for Employee Union Expenses**

In addition to taxation of benefits and tax credits, the PTF account includes reimbursement to the trust funds from general funds, including interest, for certain administrative expenses incurred in support of federal employee union activities. This \$11 million reimbursement is included in SSA's Limitation on Administrative Expenses appropriation.

#### **Transfers to Offset Two Coverage Provisions**

Section 15361 of P.L. 110-246, the Food, Conservation, and Energy Act of 2008, provides for annual transfers from the general fund of the Treasury to the OASDI trust funds in FYs 2009 through 2017 to roughly offset the financial effects of the law's two coverage provisions. Section 15301 of P.L. 110-246 excludes Conservation Reserve Program payments from SECA coverage for OASDI beneficiaries, and Section 15352 increases the limit for the optional method for computing earnings from self-employment. The transfers will be \$6 million in FY 2016 and \$7 million in FY 2017.

#### **Reimbursement for Payroll Tax Holiday**

P.L. 111-312, the Tax Relief, Unemployment Insurance Reauthorization, and Job Creation Act of 2010, reduced employees' payroll contributions from 6.2 percent to 4.2 percent for calendar year 2011. P.L. 112-78, the Temporary Payroll Tax Cut Continuation Act of 2011, amended

## **Payments to Social Security Trust Funds**

P.L. 111-312 to extend the reduced payroll contributions through February 29, 2012. On February 22, 2012, a new law, the Middle Class Tax Relief and Job Creation Act of 2012 (P.L. 112-96) extended the reduced rate through December 31, 2012. The general funds continue to reimburse the trust funds for this loss in tax revenue. The estimated reimbursement from the general fund for the payroll tax holiday is \$118 million in FY 2016.

## BUDGETARY RESOURCES

The PTF annual appropriation request for FY 2017 is \$11,400,000. SSA expects to make \$39,250,450,000 in payments to the trust funds in FY 2017, including amounts appropriated under permanent indefinite authority.

Table 1.2—Amounts Available for Obligation

	FY 2015 Actual	FY 2016 Enacted	FY 2017 Estimate
<b>Annual Appropriation</b>	<b>\$ 16,400,000</b>	<b>\$ 11,400,000</b>	<b>\$ 11,400,000</b>
<b>Permanent Appropriation</b>	<b>\$ 30,922,939,039</b>	<b>\$ 32,721,000,000</b>	<b>\$ 39,239,000,000</b>
Total Appropriation	\$ 30,939,339,039	\$ 32,732,400,000	\$ 39,250,400,000
Unobligated Balance, Start-of-Year	\$ 12,852,343	\$ 12,829,664	\$ 12,779,664
<b>Subtotal Budgetary Resources</b>	<b>\$ 30,952,191,382</b>	<b>\$ 32,745,229,664</b>	<b>\$ 39,263,179,664</b>
<b>Obligations</b>	<b>(\$ 30,926,809,294)</b>	<b>(\$ 32,732,450,000)</b>	<b>(\$ 39,250,450,000)</b>
Unobligated Balance, End-of-Year	\$ 12,829,664	\$ 12,779,664	\$ 12,729,664
Unobligated Balance, Lapsing	\$ 12,552,424	\$ 0	\$ 0

The unobligated balances represent funds appropriated for the Coal Industry Retiree Health Benefits Act (CIRHBA) in FY 1996 and FY 1997 and made available until expended. The lapsed unobligated balances represent the amount of the annual appropriation not obligated in the current year.



## ANALYSIS OF CHANGES

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The FY 2017 annual appropriation request is the same as the FY 2016 enacted level. The obligations reported below include CIRHBA activity, funded from unobligated balances carried forward from prior years. These funds, provided in FY 1996 and FY 1997, remain available until expended.

**Table 1.3—Summary of Changes**

	<b>FY 2016 Enacted</b>	<b>FY 2017 Estimate</b>	<b><i>FY16 to FY17 Change</i></b>
<b>Appropriation</b>	<b>\$ 11,400,000</b>	<b>\$ 11,400,000</b>	<b>\$ 0</b>
<b>Obligations</b>	<b>\$ 11,450,000</b>	<b>\$ 11,450,000</b>	<b>\$ 0</b>

## BUDGET AUTHORITY AND OBLIGATIONS BY ACTIVITY

The table below displays the budget authority and obligations for each of the PTF activities funded by the annual appropriation. Coal Industry Retiree Health Benefit obligations are funded from prior year unobligated balances.

**Table 1.4—New Budget Authority & Obligations, Current Authority  
(In thousands)**

	FY 2015 Actual	FY 2016 Enacted	FY 2017 Estimate
<b><u>Appropriation</u></b>			
Pension Reform	\$ 6,400	\$ 6,400	\$ 6,400
Unnegotiated Checks	\$ 10,000	\$ 5,000	\$ 5,000
Coal Industry Retiree Health Benefits	\$ 0	\$ 0	\$ 0
<b>Total Annual Appropriation</b>	<b>\$ 16,400</b>	<b>\$ 11,400</b>	<b>\$ 11,400</b>
<b><u>Obligations</u></b>			
Pension Reform	\$ 858	\$ 6,400	\$ 6,400
Unnegotiated Checks	\$ 2,989	\$ 5,000	\$ 5,000
Coal Industry Retiree Health Benefits	\$ 23	\$ 50	\$ 50
<b>Total Obligations</b>	<b>\$ 3,870</b>	<b>\$ 11,450</b>	<b>\$ 11,450</b>

## Payments to Social Security Trust Funds

The table below displays budget authority and obligations for the PTF activities not subject to the annual appropriation. This includes taxation of benefits, FICA and SECA tax credits, reimbursement for certain union administrative expenses, transfers to offset the financial effects of the Food, Conservation, and Energy Act of 2008, and reimbursements for the employee payroll tax holiday. The actual amount appropriated for these activities is determined by the actual amount collected from, or to be reimbursed for, each activity.

**Table 1.5—Budget Authority and Obligations,  
Permanent Indefinite Authority  
(In thousands)**

	<b>FY 2015 Actual</b>	<b>FY 2016 Enacted</b>	<b>FY 2017 Estimate</b>
<b><u>Appropriation</u></b>			
Reimb. for Union Administrative Expenses	\$ 9,634	\$ 11,000	\$ 11,000
Food, Conservation, and Energy Act, 2008 <sup>1</sup>	\$ 8,000	\$ 6,000	\$ 7,000
Employee Payroll Tax Holiday <sup>2</sup>	\$ 242,520	\$ 118,000	\$ 0
Taxation of Benefits, U.S.	\$ 30,469,744	\$ 32,383,000	\$ 39,007,000
Taxation of Benefits, Nonresident Alien	\$ 193,000	\$ 203,000	\$ 214,000
FICA Tax Credits	\$ 0	\$ 0	\$ 0
SECA Tax Credits	\$ 41	\$ 0	\$ 0
<b>Total Permanent Appropriation</b>	<b>\$ 30,922,939</b>	<b>\$ 32,721,000</b>	<b>\$ 39,239,000</b>
<b><u>Obligations</u></b>			
Reimb. for Union Administrative Expenses	\$ 9,634	\$ 11,000	\$ 11,000
Food, Conservation, and Energy Act, 2008	\$ 8,000	\$ 6,000	\$ 7,000
Employee Payroll Tax Holiday	\$ 242,520	\$ 118,000	\$ 0
Taxation of Benefits, U.S.	\$ 30,469,744	\$ 32,383,000	\$ 39,007,000
Taxation of Benefits, Nonresident Alien	\$ 193,000	\$ 203,000	\$ 214,000
FICA Tax Credits	\$ 0	\$ 0	\$ 0
SECA Tax Credits	\$ 41	\$ 0	\$ 0
<b>Total Obligations</b>	<b>\$ 30,922,939</b>	<b>\$ 32,721,000</b>	<b>\$ 39,239,000</b>

<sup>1</sup> P.L. 110-246, the Food, Conservation, and Energy Act of 2008 (H.R. 6124) provided that SSA's trust funds would be reimbursed for lost income resulting from enacted changes to the reporting of self-employment income (SECA taxes). The bill established that SSA would be reimbursed from FY 2009 to FY 2017.

<sup>2</sup> P.L. 111-312, the Tax Relief, Unemployment Insurance Reauthorization, and Job Creation Act of 2010 (H.R. 4853), reduced employees' payroll contributions from 6.2 percent to 4.2 percent for calendar year 2011. P.L. 112-78, the Temporary Payroll Tax Cut Continuation Act of 2011 (H.R. 3765) amended P.L. 111-312 to extend the reduced payroll contributions through February 29, 2012. On February 22, 2012, a new law, the Middle Class Tax Relief and Job Creation Act of 2012 (P.L. 112-96) extended the reduced rate through December 31, 2012. The general funds reimburse the trust funds for the loss in tax revenue (Title VI, Sec 601).

## OBLIGATIONS BY OBJECT CLASS

The table below displays the obligations by object class for the total PTF account (annually and permanently appropriated funds).

**Table 1.6—Obligations by Object  
(In thousands)**

	<b>FY 2015 Actual</b>	<b>FY 2016 Enacted</b>	<b>FY 2017 Estimate</b>
<b>Other Services</b>	\$ 21,545	\$ 28,450	\$ 29,450
<b>Financial Transfers</b>	\$ 30,662,744	\$ 32,586,000	\$ 39,221,000
<b>Financial Transfers: Employee Payroll Tax Holiday</b>	\$ 242,520	\$ 118,000	\$ 0
<b>Total Obligations</b>	<b>\$ 30,926,809</b>	<b>\$ 32,732,450</b>	<b>\$ 39,250,450</b>

## BACKGROUND

### AUTHORIZING LEGISLATION

The PTF account is authorized by the sections of the Social Security Act described below.

**Table 1.7—Authorizing Legislation (In thousands)**

	<b>Amount Authorized</b>	<b>FY 2015 Actual</b>	<b>FY 2016 Enacted</b>	<b>FY 2017 Estimate</b>
Pension Reform: S.S. Act, Section 1131(b)(2)	Indefinite	\$ 6,400	\$ 6,400	\$ 6,400
Unnegotiated Checks: S.S. Act, Section 201(m); Social Security Amendments of 1983, Section 152	Indefinite	\$ 10,000	\$ 5,000	\$ 5,000
Coal Industry Retiree Health Benefits: Internal Revenue Code of 1986, Sections 9704 and 9706; Energy Policy Act of 1992, Section 19141	Indefinite	\$ 0	\$ 0	\$ 0
<b>Subtotal Annual PTF Appropriation</b>		<b>\$ 16,400</b>	<b>\$ 11,400</b>	<b>\$ 11,400</b>
Reimbursement for Union Administrative Expenses: FY 2002 Social Security Appropriations Act	Permanent Indefinite	\$ 9,634	\$ 11,000	\$ 11,000
Food, Conservation, and Energy Act, 2008: P.L. 110-246, Section 15361	Permanent	\$ 8,000	\$ 6,000	\$ 7,000
Employee Payroll Tax Holiday: P.L. 111-312, Section 601, As Amended By Temporary Payroll Tax Cut Continuation Act: P.L. 112-78	Permanent Indefinite	\$ 242,520	\$ 118,000	\$ 0
Taxation of Benefits, U.S.: Social Security Amendments of 1983, Section 121	Permanent Indefinite	\$ 30,469,744	\$ 32,383,000	\$ 39,007,000
Taxation of Benefits, Nonresident Aliens: Social Security Amendments of 1983, Section 121	Permanent Indefinite	\$ 193,000	\$ 203,000	\$ 214,000
FICA/SECA Tax Credits: Social Security Amendments of 1983, Section 124(b)	Permanent Indefinite	\$ 41	\$ 0	\$ 0
<b>Subtotal Permanent PTF Appropriation</b>		<b>\$ 30,922,939</b>	<b>\$ 32,721,000</b>	<b>\$ 39,239,000</b>
<b>Total Appropriation</b>		<b>\$ 30,939,339</b>	<b>\$ 32,732,400</b>	<b>\$ 39,250,400</b>

## APPROPRIATION HISTORY

The table below displays the annual appropriation requested by SSA, amounts approved by the House and Senate, and the amount ultimately appropriated by Congress. This does not include amounts appropriated under permanent indefinite authority. The FY 2007 appropriation included a one-time reimbursement to the trust funds for an overpayment made from the trust funds to the IRS. The quinquennial adjustment for Military Service Wage Credits is included in the FY 2008 and FY 2011 enacted appropriations. The FY 2008 appropriation also included funds to administer economic recovery payments to beneficiaries.

**Table 1.8—Appropriation History Table**

Fiscal Year	Budget Estimate to Congress	House Committee Passed	Senate Committee Passed	Enacted Appropriation
2007 <sup>1</sup>	\$ 27,756,000	\$ 27,756,000 <sup>2</sup>	\$ 27,756,000 <sup>3</sup>	\$ 20,416,000 <sup>4</sup>
Trust Funds Restoration Act <sup>5</sup>				\$ 1,297,614,000
2008 <sup>6</sup>	\$ 28,140,000	\$ 28,140,000 <sup>7</sup>	\$ 28,140,000 <sup>8</sup>	\$ 28,140,000 <sup>9</sup>
Economic Stimulus Act <sup>10</sup>				\$ 31,000,000
2009	\$ 20,406,000	-- <sup>11</sup>	\$ 20,406,000 <sup>12</sup>	\$ 20,406,000 <sup>13</sup>
2010	\$ 20,404,000	\$ 20,404,000 <sup>14</sup>	\$ 20,404,000 <sup>15</sup>	\$ 20,404,000 <sup>16</sup>
2011 <sup>17</sup>	\$ 21,404,000	-- <sup>18</sup>	\$ 21,404,000 <sup>19</sup>	\$ 21,404,000 <sup>20</sup>
2012	\$ 20,404,000	-- <sup>21</sup>	\$ 20,404,000 <sup>22</sup>	\$ 20,404,000 <sup>23</sup>
2013	\$ 20,402,000	-- <sup>24</sup>	\$ 20,404,000 <sup>25</sup>	\$ 20,404,000 <sup>26</sup>
2014	\$ 16,400,000	-- <sup>27</sup>	\$ 16,400,000 <sup>28</sup>	\$ 16,400,000 <sup>29</sup>
2015	\$ 16,400,000	\$ 16,400,000 <sup>30</sup>	--- <sup>31</sup>	\$ 16,400,000 <sup>32</sup>
2016	\$ 20,400,000	\$ 20,400,000 <sup>33</sup>	\$ 20,400,000 <sup>34</sup>	\$ 11,400,000 <sup>35</sup>
<b>2017</b>	<b>\$ 11,400,000</b>			

<sup>1</sup> The FY 2007 request included \$7,340,000 for the quinquennial adjustment to the Federal Disability Insurance Trust Fund for the costs of granting noncontributory credit for military service. This was not appropriated for FY 2007.

<sup>2</sup> H.R. 5647.

<sup>3</sup> S. 3708.

<sup>4</sup> Revised Continuing Appropriations Resolution, 2007 (P.L. 110-5).

<sup>5</sup> Appropriation provided by the Social Security Trust Funds Restoration Act of 2006 (P.L. 109-465), to repay the Social Security trust funds for an overpayment to the Internal Revenue Service for Voluntary Income Tax Withholding.

<sup>6</sup> Includes \$7,727,000 for the quinquennial adjustment to the Federal Disability Insurance Trust Fund for the costs of granting noncontributory credit for military service.

<sup>7</sup> H.R. 3043.

<sup>8</sup> S. 1710.

## Payments to Social Security Trust Funds

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- <sup>9</sup> Consolidated Appropriations Act, 2008 (P.L. 110-161).
- <sup>10</sup> Appropriation provided by the Economic Stimulus Act of 2008, P.L. 110-185, for agency administrative costs related to stimulus payments to Social Security beneficiaries.
- <sup>11</sup> The House Committee on Appropriations did not report a bill.
- <sup>12</sup> S. 3230.
- <sup>13</sup> Omnibus Appropriations Act, 2009 (P.L. 111-8).
- <sup>14</sup> H.R. 3293.
- <sup>15</sup> H.R. 3293, reported from Committee with an amendment.
- <sup>16</sup> Consolidated Appropriations Act, 2010 (P.L. 111-117).
- <sup>17</sup> Requested \$1 million in FY 2011 for the quinquennial adjustment for military service wage credits from the general funds to the Federal Disability Insurance Trust Fund. However, we later determined that transfers should be made from the trust funds to the general fund in FY 2011.
- <sup>18</sup> The House Committee on Appropriations did not report a bill.
- <sup>19</sup> S. 3686.
- <sup>20</sup> Department of Defense and Full-Year Continuing Appropriations Act, 2011 (P.L. 112-10).
- <sup>21</sup> The House Committee on Appropriations did not report a bill. Appropriations Chairman Rehberg introduced H.R. 3070, which included \$20,404,000.
- <sup>22</sup> S. 1599.
- <sup>23</sup> Consolidated Appropriations Act, 2012 (P.L. 112-74).
- <sup>24</sup> The House Committee on Appropriations did not report a bill.
- <sup>25</sup> S. 3295.
- <sup>26</sup> Department of Defense, Military Construction and Veterans Affairs, and Full-Year Continuing Appropriations Act, 2013 (P.L. 113-6).
- <sup>27</sup> The House Committee on Appropriations did not report a bill.
- <sup>28</sup> S. 1284.
- <sup>29</sup> Consolidated Appropriations Act, 2014 (P.L. 113-76).
- <sup>30</sup> H.R. 83.
- <sup>31</sup> The Senate Committee on Appropriations did not report a bill.
- <sup>32</sup> Consolidated and Further Continuing Appropriations Act, 2015 (P.L. 113-235).
- <sup>33</sup> H.R. 3020.
- <sup>34</sup> S. 1695.
- <sup>35</sup> Consolidated Appropriations Act, 2016 (P.L. 114-113).

## PENSION REFORM

**Authorizing Legislation:** Section 1131(b)(2) of the Social Security Act.

### PURPOSE AND METHOD OF OPERATION

The purpose of this payment is to reimburse the OASI Trust Fund for the cost of certain pension reform activities chargeable to Federal funds.

**Table 1.9—Pension Reform: Budget Authority**

	<b>FY 2015 Actual</b>	<b>FY 2016 Enacted</b>	<b>FY 2017 Estimate</b>	<b>FY16 to FY17 Change</b>
<b>Budget Authority</b>	\$ 6,400,000	\$ 6,400,000	<b>\$ 6,400,000</b>	<b>\$ 0</b>

The Employee Retirement Income Security Act of 1974, P.L. 93-406 (Pension Reform Act, also known as ERISA) established section 1131 of the Social Security Act. This requires the Commissioner of Social Security to furnish information regarding deferred vested pension rights to pension plan participants (and their dependents or survivors), either upon request or automatically upon application for retirement, survivors, or disability insurance benefits.

Each time an employee leaves employment that earned him or her vested rights to a pension, SSA or its contractor representative receives related information from the IRS in either paper or electronic format. SSA or its contractor representative controls, scans (using optical character recognition), and, if necessary, keys the paper forms and transfers the data to the ERISA mainframe system. This data, along with electronic data received from the IRS, is added to the ERISA Master Files after name verification against the NUMIDENT (SSN record) database takes place. Each month, an activity file of new benefit applications is compared to the ERISA Master Files. SSA sends an ERISA notice of pension plan eligibility to individuals included in both the activity file and the ERISA Master Files. This notice includes the information the worker needs to contact the pension plan administrator. SSA staff also resolves exceptions and responds to inquiries from employers and the public.

Section 1131(b)(1) permits the administrative expenses of carrying out this pension reform work to be funded initially from the OASI Trust Fund through SSA's Limitation on Administrative Expenses. Section 1131(b)(2) authorizes an annual appropriation of federal funds to reimburse the OASI Trust Fund. To the extent that resources needed to process this workload exceed the budget authority available for reimbursement in the current year, reimbursement is made to the OASI Trust Fund at the beginning of the subsequent year, including interest as appropriate. SSA began to incur pension reform administrative expenses in FY 1977.



**Table 1.10—Pension Reform: Obligations**

<b>Fiscal Year</b>	<b>Obligations</b>
FY 2008	\$ 1,200,000
FY 2009	\$ 813,000
FY 2010	\$ 2,022,000
FY 2011 <sup>1</sup>	\$ 3,802,000
FY 2012	\$ 6,400,000
FY 2013	\$ 2,521,092
FY 2014	\$ 1,010,592
FY 2015	\$ 858,477
FY 2016 Estimate	\$ 6,400,000
<b>FY 2017 Estimate</b>	<b>\$ 6,400,000</b>

## RATIONALE FOR BUDGET REQUEST

The FY 2017 budget requests \$6,400,000 to reimburse the OASI Trust Fund for the cost of carrying out SSA's responsibilities under the Pension Reform Act. The FY 2017 request is the same as the FY 2016 enacted level. The table below summarizes the recent trend of pension coverage report receipts:

**Table 1.11—Receipts from Pension Coverage Reports**

<b>Fiscal Year</b>	<b>Pension Coverage Report Receipts</b>
FY 2004	5,621,371
FY 2005	5,363,409
FY 2006	6,003,014
FY 2007	5,397,935
FY 2008	5,554,314
FY 2009	6,073,898
FY 2010	6,334,329
FY 2011 <sup>2</sup>	68,159
FY 2012	10,454,215
FY 2013	3,810,675
FY 2014	8,074,160
<b>FY 2015</b>	<b>6,310,851</b>

<sup>1</sup> Despite a downturn in report receipts, due to costs incurred to support the conversion of ERISA microfilm to computer images, as well as other IT-related costs, obligations for Pension Reform increased in FY 2011.

<sup>2</sup> Because IRS created a new form (IRS Form 8955-SSA) for filers and a new electronic filing system, in addition to granting a filing deferral during this timeframe, most of the pension coverage report receipts were input into the system in FY 2012 (i.e., FY 2012 receipts essentially represent 2 years of receipts).

## UNNEGOTIATED CHECKS

**Authorizing Legislation:** Section 201(m) of the Social Security Act and Section 152 of P.L. 98-21.

### PURPOSE AND METHOD OF OPERATION

The purpose of this payment is to reimburse the OASI and DI Trust Funds for the value of interest on benefit checks cashed after 6 months or subsequently cancelled.

**Table 1.12—Unnegotiated Checks: Budget Authority**

	<b>FY 2015 Actual</b>	<b>FY 2016 Enacted</b>	<b>FY 2017 Estimate</b>	<b>FY16 to FY17 Change</b>
<b>Budget Authority</b>	\$ 10,000,000	\$ 5,000,000	<b>\$ 5,000,000</b>	\$ 0

This activity was originally established to reimburse the trust funds for uncashed benefit checks and accrued interest. Beginning October 1, 1989, Social Security checks, like those issued by other federal agencies, are negotiable for only 12 months from their date of issue under the provisions of the Competitive Equality Banking Act (CEBA) of 1987 (P.L. 100-86). In the 14<sup>th</sup> month after issue, the Department of the Treasury prepares a listing of checks outstanding from each agency, cancels those checks, and refunds the value of checks canceled to the authorizing agencies. Under this "Limited Payability" procedure, the value of unnegotiated checks issued on or after October 1, 1989 are credited directly to the trust funds from Treasury's general fund when the checks are canceled, pursuant to P.L. 100-86. These funds do not pass through the Payments to Social Security Trust Funds account. However, the interest adjustment must be paid through this account because CEBA made no provision for it.

This appropriation funds the estimated ongoing level of activity and represents the value of interest for unnegotiated OASDI benefit checks.

**Table 1.13—Unnegotiated Checks: Obligations**

<b>Fiscal Year</b>	<b>Obligations</b>
FY 2009	\$ 8,756,319
FY 2010	\$ 7,435,351
FY 2011	\$ 7,471,475
FY 2012	\$ 5,910,374
FY 2013	\$ 3,082,985
FY 2014	\$ 2,698,386
FY 2015	\$ 2,989,099
FY 2016 Estimate	\$ 5,000,000
<b>FY 2017 Estimate</b>	<b>\$ 5,000,000</b>

## Payments to Social Security Trust Funds

The actual interest reflects the ongoing shift of beneficiaries away from the paper check method of benefit payment to direct deposit. On December 21, 2010, the Department of Treasury published a final rule amending 31 Code of Federal Regulations Part 208 to require recipients of federal benefits and nontax payments to receive their payments by electronic funds transfer. People who apply for Social Security benefits on or after May 1, 2011 receive their payments electronically. Many people who previously received federal benefit checks before May 1, 2011 have switched to an electronic payment. As a result, the final rule has decreased the volume of unnegotiated benefit checks, and we expect this trend to continue. Benefits paid via direct deposit bypass the mechanism in which there is the possibility of an uncashed check. However, the effect of the growth in direct deposit participation on unnegotiated check interest is somewhat offset by increases in the number of beneficiaries and in the average monthly benefit payments. The following table summarizes the recent trend in the percentage of OASDI beneficiaries enrolled in the direct deposit payment program.

**Table 1.14—Direct Deposit Participation Rate**

	<b>Direct Deposit Participation Rate</b>
December 2006	84%
December 2007	85%
December 2008	86%
December 2009	87%
December 2010	88%
December 2011	91%
December 2012	95%
December 2013	98%
December 2014	99%
<b>December 2015</b>	<b>99%</b>

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## RATIONALE FOR BUDGET REQUEST

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The FY 2017 request is for \$5,000,000 to reimburse the OASDI Trust Funds for the value of interest on unnegotiated checks. The FY 2017 request is equal to the FY 2016 enacted.

**Table 1.15—Unnegotiated Checks: Budget Authority by Trust Fund**

	<b>FY 2017 Estimate</b>
OASI Trust Fund	\$ 3,000,000
DI Trust Fund	\$ 2,000,000
<b>Total</b>	<b>\$ 5,000,000</b>

## COAL INDUSTRY RETIREE HEALTH BENEFITS

**Authorizing Legislation:** Sections 9704 and 9706 of the Internal Revenue Code of 1986 as amended by section 19141 of the Energy Policy Act of 1992.

### PURPOSE AND METHOD OF OPERATION

The purpose of this payment is to reimburse the OASDI Trust Funds for work carried out under section 19141 of the Energy Policy Act of 1992 (Public Law 102-486), which established the Coal Industry Retiree Health Benefit Act of 1992 (CIRHBA).

**Table 1.16—Coal Industry Retiree Health Benefits: Obligations**

	<b>FY 2015 Actual</b>	<b>FY 2016 Enacted</b>	<b>FY 2017 Estimate</b>	<b>FY16 to FY17 Change</b>
<b>New Budget Authority</b>	\$ 0	\$ 0	\$ 0	\$ 0
<b>Obligations</b>	\$ 22,679	\$ 50,000	<b>\$ 50,000</b>	\$ 0

CIRHBA combined two existing United Mine Workers of America (UMWA) pension plans into a single fund and required that certain existing coal mine operators pay health benefit premiums for the new combined plan. The law directed the Commissioner of Social Security to:

- Search the earnings records of the group of retired coal miners covered by the combined plan;
- Determine which retirees should be assigned to which mine operators;
- Notify the involved mine operators of the names and Social Security numbers of eligible beneficiaries who have been assigned to them;
- Process appeals from operators who believe that assignments have been made incorrectly; and
- Compute the premiums based on a formula established in the Act.

## PROGRESS TO DATE

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SSA has completed initial decisions and reviews on all of the retired miners covered under the provisions of the 1992 CIRHBA. In addition, SSA implemented the Coal Act provisions of the Tax Relief and Health Care Act of 2006 (P.L. 109-432), which significantly affected and restructured CIRHBA. SSA carefully reviewed the legislation, obtained legal advice, and assessed how P.L. 109-432 affected existing policies and procedures. SSA complied with the provision that specifically directed the Commissioner to “revoke all assignments to persons other than 1988 agreement operators for purposes of assessing premiums for plan years beginning on or after October 1, 2007.”

SSA devoted considerable time and resources to comply with P.L. 109-432. All court cases challenging SSA’s involvement in the Coal Act are now closed. There is no active litigation. SSA has also completed its obligation to provide yearly data on miner assignments to the UMWA Combined Benefit Fund. However, SSA’s Office of the Actuary continues to compute the per beneficiary premiums on a yearly basis.

This account provides general fund reimbursement to the trust funds to the extent that the Limitation on Administrative Expenses account advances funds for SSA to carry out this work. Additional funds are not requested for FY 2017 because the balance of the \$10,000,000 per year appropriated in FY 1996 and in FY 1997 remains available until expended to reimburse the trust funds.

## MILITARY SERVICE WAGE CREDITS

**Prior Authorizing Legislation:** Section 217(g) of the Social Security Act.

**Terminating Legislation:** Section 842 of the Bipartisan Budget Act of 2015.

### PURPOSE AND METHOD OF OPERATION

The purpose of this payment was to reimburse the OASDI trust funds, as necessary, for the costs of granting noncontributory wage credits for pre-1957 military service, as authorized by Section 217(g). Section 842 of the 2015 Bipartisan Budget Act made 2010 the final year for adjustments/transfers.

Pre-1957 Military Service: The 1946 Social Security Amendments provided for payment of Social Security benefits to World War II veterans and their survivors based upon noncontributory wage credits of \$160 for each month of the veteran's active military service. Subsequent amendments extended the period for which these credits were granted through December 1956. For that period, the Social Security Act did not require contributions to the trust funds based on the wages of individuals in the military service. To finance the additional costs incurred in paying benefits, which are based on periods of military service before 1957 for which no contributions were made, the Social Security Act provides for reimbursement to the OASI and the DI trust funds from the general fund of the Treasury.

The Social Security Amendments of 1983 modified section 217(g) to reimburse the trust funds in a lump sum for the present value of all future benefits arising from the gratuitous credits granted for military service before 1957. This provision directed the Secretary of the Treasury to transfer the pre-1957 wage credit lump sum to the trust funds within 30 days after enactment of the legislation. Section 217(g) required that the Commissioner adjust this lump sum transfer every fifth year beginning in 1985. This adjustment was required to be done on the basis of the actual benefit payment and administrative expense data available at the time of the determination, as well as the relevant actuarial assumptions in the Social Security Trustees Report issued in the year of the adjustment. Under the 1983 amendments, the only costs of pre-1957 military service credits included in the determination of this adjustment were additional benefit payments and associated administrative expenses incurred as a result of the granting of these non-contributory wage credits. This adjustment amount was required by section 217(g) to be transferred within 30 days of the date of the determination.

Following the initial transfers from the general fund to the trust funds in 1983 and 1985, the quinquennial adjustments resulted in the transfer of funds from SSA's trust funds to the general fund of the Treasury each time until the 2000 determination was prepared. In that year, it was determined that the general fund owed a payment to the OASI trust fund instead. The FY 2002 appropriation for this transfer, including interest, was \$414,000,000. Appropriations were not needed whenever quinquennial transfers were determined to be due from the trust funds to the general fund.

## **Payments to Social Security Trust Funds**

The 2010 quinquennial adjustment took place December 30, 2010 and included a \$113 million transfer from the OASI trust fund to the general fund and a \$3 million transfer from the DI trust fund to the general fund.

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## APPROPRIATION LANGUAGE

### SUPPLEMENTAL SECURITY INCOME PROGRAM

For carrying out titles XI and XVI of the Social Security Act, section 401 of Public Law 92-603, section 212 of Public Law 93-66, as amended, and section 405 of Public Law 95-216, including payment to the Social Security trust funds for administrative expenses incurred pursuant to section 201(g)(1) of the Social Security Act, [\$46,305,733,000] \$43,824,868,000 to remain available until expended: *Provided*, That any portion of the funds provided to a State in the current fiscal year and not obligated by the State during that year shall be returned to the Treasury: *Provided further*, That not more than [\$101,000,000] \$58,000,000 shall be available for research and demonstrations under sections 1110, 1115, and 1144 of the Social Security Act and remain available through September 30, [2018] 2019.

For making, after June 15 of the current fiscal year, benefit payments to individuals under title XVI of the Social Security Act, for unanticipated costs incurred for the current fiscal year, such sums as may be necessary.

For making benefit payments under title XVI of the Social Security Act for the first quarter of fiscal year [2017] 2018, [\$14,500,000,000] \$15,000,000,000, to remain available until expended. (Departments of Labor, Health and Human Services, and Education, and Related Agencies Appropriations Act, 2016.)

## LANGUAGE ANALYSIS

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The appropriation language provides the Social Security Administration (SSA) with the funds needed to carry out its responsibilities under the Supplemental Security Income (SSI) program. This includes the funds needed to pay Federal benefits, administer the program, and provide beneficiary services to recipients. The budget authority for these activities is made available until expended, providing SSA the authority to carryover unobligated balances for use in future fiscal years. In addition, a portion of this funding is made available for SSA to conduct research and demonstration projects, which is available for 3 years, providing SSA the authority to carryover unobligated balances into the next fiscal year.

In addition, the language provides SSA with indefinite authority beginning June 15 in the event Federal benefit payment obligations in FY 2017 are higher than expected and SSA does not have sufficient unobligated balances to cover the difference. Consistent with previous years, the appropriation also includes an advance appropriation for Federal benefit payments in the first quarter of FY 2018 to ensure the timely payment of benefits in case of a delay in the FY 2018 appropriations bill.

**Table 2.1—Appropriation Language Analysis**

Language provision	Explanation
"For carrying out titles XI and XVI of the Social Security Act... including payment to the Social Security trust funds for administrative expenses incurred pursuant to section 201(g)(1) of the Social Security Act, \$43,824,868,000, to remain available until expended:"	Appropriates funds for Federal benefit payments, administrative expenses, beneficiary services, and research and demonstration projects under the SSI program. SSA may carryover unobligated balances for use in future fiscal years.
"Provided, That any portion of the funds provided to a State in the current fiscal year and not obligated by the State during that year shall be returned to the Treasury."	Ensures that states do not carry unobligated balances of Federal funds into the subsequent fiscal year. Applies primarily to the beneficiary services activity.
Provided further, That not more than \$58,000,000 shall be available for research and demonstrations under sections 1110, 1115, and 1144 of the Social Security Act and remain available through September 30, 2019.	Specifies that not more than \$58 million of the SSI appropriation is available for research and demonstration projects. SSA may carryover unobligated balances through September 30, 2019.

## Supplemental Security Income Program

"For making, after June 15 of the current fiscal year, benefit payments to individuals under title XVI of the Social Security Act, for unanticipated costs incurred for the current fiscal year, such sums as may be necessary."	Provides an indefinite appropriation to finance any shortfall in the definite appropriation for benefit payments during the last months of the fiscal year.
"For making benefit payments under title XVI of the Social Security Act for the first quarter of fiscal year 2018, \$15,000,000,000, to remain available until expended."	Appropriates funds for benefit payments in the first quarter of the subsequent fiscal year. Ensures that recipients will continue to receive benefits during the first quarter of FY 2018 in the event of a temporary funding hiatus.

## GENERAL STATEMENT

The SSI program guarantees a minimum level of income to financially needy individuals who are aged, blind, or disabled. The program was created in 1972 by Title XVI of the Social Security Act and payments began January 1974. It is Federally-administered and funded from general revenues.

Prior to the establishment of the SSI program, the Social Security Act provided means-tested assistance through three separate programs—Old-Age Assistance, Aid to the Blind, and Aid to the Permanently and Totally Disabled. Federal law only established broad guidelines, with each state largely responsible for setting its own eligibility and payment standards. The SSI program was established to provide uniform standards across states.

**Table 2.2—Summary of Appropriations and Obligations  
(in thousands)**

	<b>FY 2015 Actual</b>	<b>FY 2016 Enacted</b>	<b>FY 2017 Estimate</b>	<b>Change</b>
Appropriation	\$ 60,932,978	\$ 64,429,733 <sup>1</sup>	<b>\$ 58,324,868</b>	-\$ 6,104,865
Obligations	\$ 59,422,736	\$ 64,512,412	<b>\$ 61,646,258</b>	- \$ 2,866,154
First Quarter Advance Appropriation for Subsequent Fiscal Year	\$ 19,200,000	\$14,500,000	<b>\$ 15,000,000</b>	+ \$ 500,000

## PROGRAM OVERVIEW

### Eligibility Standards

As a means-tested program, individuals must have income and resources below specified levels to be eligible for benefits. Rules allow some specific categories of income and resources to be either totally or partially excluded. Recently, the ABLE Act of 2014 created a new type of tax-advantaged account that has a limited effect on an individual's eligibility for the SSI program and other Federal means-tested programs.

An individual's benefit payment is reduced dollar for dollar by the amount of their "countable income"—income less all applicable exclusions—in a given month. Income in the SSI program includes "earned income" such as wages and net earnings from self-employment; and "unearned income" such as Social Security benefits, unemployment compensation, deemed income from a spouse or parent, and the value of in-kind support and maintenance such as food and shelter. Different exclusion rules apply for different types of income.

<sup>1</sup> Reflects the most recent Federal benefit estimate from SSA's Office of the Chief Actuary.

### **Incentives for Work and Opportunities for Rehabilitation**

The SSI program is designed to help recipients with disabilities achieve independence by encouraging and supporting their attempts to work. The program includes a number of work incentive provisions that enable recipients who are blind or disabled to work and retain benefits. The program also includes provisions to help disabled beneficiaries obtain vocational rehabilitation and employment support services. These provisions were revised by legislation establishing the Ticket to Work program, discussed in more detail in the Beneficiary Services section.

### **State Supplementation**

Supplementation is mandatory for certain recipients who were on state rolls just prior to the creation of the Federal program on January 1, 1974. Otherwise, states are encouraged to supplement the Federal benefit and may elect to have their state supplementation program administered by SSA. States that choose to have SSA administer their program reimburse SSA in advance and SSA makes the payment on behalf of the state. Participating states also reimburse SSA for the cost of administering their program, based on a user fee schedule established by the Social Security Act. The user fee is \$11.56 per SSI check payment in FY 2016 and is expected to increase to \$11.69 in FY 2017. The Department of Treasury receives the first \$5.00 of each fee and SSA retains the amount over \$5.00.

### **Coordination with Other Programs**

SSA plays an important role in helping states administer Medicaid and the Supplemental Nutrition Assistance Program (SNAP). Provisions in the SSI statute ensure that payments made by states or under the Social Security program are not duplicated by SSI benefits.

Generally, SSI recipients are categorically eligible for Medicaid. States may either use SSI eligibility criteria for determining Medicaid eligibility or use their own, provided the criteria are no more restrictive than the state's January 1972 medical assistance standards.

SSI recipients may qualify for SNAP. Social Security offices work with SSI applicants and recipients in a variety of ways to help them file for SNAP, including informing them of their potential benefits, making applications available to them, and in some cases helping them complete their applications. Social Security also shares applicant data with a number of states in support of SNAP.

### **Benefit Payments**

SSA estimates it will pay \$56.2 billion in Federal benefits to an estimated 8.2 million SSI recipients in FY 2017. Including state supplementary payments, SSA expects to pay a total of \$58.8 billion and administer payments to a total of over 8.4 million recipients.

Federal benefit payments represent approximately 91 percent of Federal SSI spending. Administrative expenses represent nearly 9 percent of spending; beneficiary services and research and demonstration projects make up the remaining less than one percent.

## FY 2017 PRESIDENT'S BUDGET REQUEST

The SSI appropriation includes funds for Federal benefit payments, administrative expenses, beneficiary services, and research and demonstration projects. In total, the President's Budget request for FY 2017 is \$58,324,868,000. However, this includes \$14,500,000,000 made available for the first quarter of FY 2017 in the FY 2016 appropriation. The appropriation language provides SSA with its remaining appropriation for FY 2017, \$43,824,868,000—the total amount requested for FY 2017 less the advance already received.

Similarly, in addition to the amount above, the request includes an advance appropriation of \$15,000,000,000 for Federal benefit payments in the first quarter of FY 2018. This advance is to ensure recipients continue to receive their benefits at the beginning of the subsequent fiscal year in case there is a delay in passing that year's appropriation.

**Table 2.3—Appropriation Detail <sup>1</sup>**  
(in thousands)

	<b>FY 2015 Actual</b>	<b>FY 2016 Enacted<sup>2</sup></b>	<b>FY 2017 Estimate</b>	<b>Change</b>
Advance for Federal Benefits <sup>3</sup>	\$ 19,700,000	\$ 19,200,000	\$ 14,500,000	
Regular for Federal Benefits	\$ 36,501,000	\$ 40,410,000	\$ 38,441,736	
<b>Subtotal Federal Benefits</b>	<b>\$ 56,201,000</b>	<b>\$ 59,610,000</b>	<b>\$52,941,736</b>	<b>- \$ 6,668,264</b>
Administrative Expenses	\$ 4,578,978	\$ 4,648,733	\$ 5,234,132	+\$ 585,399
Beneficiary Services	\$ 70,000	\$ 70,000	\$ 89,000	+ \$ 19,000
Research and Demonstration	\$ 48,000	\$ 51,000	\$ 58,000	+ \$ 7,000
Early Intervention Demonstrations	\$ 35,000	\$ 50,000	\$ 0	- \$50,000
Special Immigrant Visa- Afghani	\$ 0	\$ 0	\$ 2,000	+\$ 2,000
<b>Subtotal Advanced Appropriation</b>	<b>\$ 19,700,000</b>	<b>\$ 19,200,000</b>	<b>\$ 14,500,000</b>	
<b>Subtotal Regular Appropriation</b>	<b>\$ 41,232,978</b>	<b>\$ 45,229,733</b>	<b>\$ 43,824,868</b>	
Total Appropriation	\$ 60,932,978	\$ 64,429,733	\$ 58,324,868	- \$ 6,104,865
<b>Advance for Subsequent Year</b>	<b>\$ 19,200,000</b>	<b>\$ 14,500,000</b>	<b>\$ 15,000,000</b>	<b>+ \$ 500,000</b>

<sup>1</sup> Does not include state supplementary payments and reimbursements or the corresponding state supplementary user fee collections; user fees are included in the Limitation on Administrative Expenses (LAE) appropriation.

<sup>2</sup> Federal benefit numbers reflect the most recent estimates from SSA's Office of the Chief Actuary.

<sup>3</sup> Amount provided or requested in the previous year's appropriation bill.



## KEY INITIATIVES

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SSA continues to pursue efforts to ensure the proper management and stewardship of the SSI program.

### **Payment Accuracy**

For more than 80 years, SSA has been committed to paying the right benefit to the right person at the right time. The challenge of meeting this goal is especially apparent in the administration of the SSI program because eligibility and payment amounts are so closely tied to the fluctuating circumstances of individual recipients. In FY 2014, 93.0 percent of SSI benefit payments were free of overpayment errors and 98.5 percent were free of underpayment errors. The vast majority of incorrect payments are the result of unreported changes to recipients' incomes, resources, or living arrangements.

While maintaining and improving payment accuracy remains a challenge, SSA considers it a matter of great importance to continue to improve administration of the SSI program. SSA has taken steps to prevent overpayments before they occur and is addressing the two largest (in dollar amounts) causes of overpayments: unreported wages and unreported bank accounts.

### **Continuing Disability Reviews and Non-Disability Redeterminations**

SSI continuing disability reviews (CDRs) are periodic reviews conducted to ensure recipients are still disabled according to agency rules. The frequency of these reviews is dependent on the likelihood that a recipient's medical condition will change. Non-disability redeterminations (redeterminations) are periodic reviews that verify living arrangements, income levels, and other non-disability factors related to SSI eligibility. Similar to CDRs, the frequency of redeterminations is determined by the probability that changes affecting eligibility will occur. CDRs and redeterminations are key activities in ensuring the integrity of the SSI program and maintaining and improving payment accuracy.

The FY 2017 President's Budget request includes \$1,342 million specifically for conducting SSI CDRs and redeterminations, which would allow SSA to conduct about 621,000 SSI CDRs<sup>1</sup> and 2,822,000 redeterminations. For details on the estimated program savings resulting from the PI proposal, please refer to the Budget Process chapter in the Analytical Perspectives volume of the Budget.

### **Access to Financial Institutions**

Access to Financial Institutions (AFI) is an electronic process that verifies bank account balances with financial institutions for purposes of determining SSI eligibility. In addition to verifying alleged accounts, AFI detects undisclosed accounts by using geographic searches to generate requests to other financial institutions. AFI's purpose is to identify excess resources in financial accounts, which are a leading cause of SSI payment errors. We currently use the AFI system in all 50 States, the District of Columbia, and the Commonwealth of the Northern Mariana Islands

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<sup>1</sup> The total estimated CDR volume is 1,100,000. We expect to complete about 479,000 Social Security Disability Insurance (DI)/Concurrent CDRs in addition to SSI CDRs.

for essentially all SSI non-medical redeterminations and full applications where there is an allegation of financial resources above the current AFI resource tolerance level.

Along with preventing overpayments, AFI can help us to eliminate ineligible applicants at the beginning of the application process, reducing the workload in the State Disability Determination Services. Full implementation is defined as using AFI on essentially every full SSI claim and non-medical redetermination and assumes using 10 geographic searches per person where possible and fully integrating the process with our systems. In 2013, we expanded the use of AFI and increased geographic searches from 5 to 10, moving closer to full implementation. While we expect the 2016 account verifications to be cost effective, we continue to evaluate aspects of AFI to see if further enhancements would be beneficial.

Additionally, as part of the Bipartisan Budget Act of 2015, AFI will help us to make informed decisions on overpayment waiver requests. The change in the law grants us the ability to verify financial information for all overpaid individuals who request waivers to determine whether they have the ability to repay their overpayment. We must obtain authorization from the overpaid individual to request the financial records. If an individual refuses to provide or revokes any authorization to obtain financial records, we may determine that they do not meet one of the requirements for granting a waiver.

### **Pre-Effectuation Reviews**

The Deficit Reduction Act of 2005 provided SSA with the authority to conduct pre-effectuation reviews (PER) for favorable initial SSI adult blindness or disability determinations. SSA started conducting these reviews in April 2006. They are conducted before the individual is awarded benefits and are done to ensure the accuracy of the determinations made by State Agencies.

The DI program already required PERs, but prior to this legislation only SSI adult disability claims involving concurrent SSI/DI claims were subject to review. SSI PERs support the performance measure to reduce improper payments, improve the accuracy and integrity of the SSI program, and make the SSI and DI programs more consistent.

### **Combating Fraud**

SSA continues to engage in an aggressive program to deter, detect, investigate, and prosecute fraud. During FY 2015, SSA's Office of the Inspector General (OIG) received almost 90,000 fraud-related allegations via telephone, correspondence, fax, or email. Of those allegations, almost 21,100 were related to SSI fraud. As allegations are received, they are carefully reviewed to determine the most appropriate course of action, such as referral to OIG's Office of Investigations Field Divisions, other components of OIG, outside law enforcement agencies, or other program or policy components in SSA. In addition to matching the law enforcement data received pursuant to the matching program, Federal law authorizes OIG and SSA to release information back to law enforcement regarding beneficiaries and recipients who have unsatisfied felony arrest warrants or who are violating a condition of probation or parole imposed under Federal or State law. Individuals are identified by using an automated data matching process which compares warrant information at the State and Federal levels with the SSI rolls.

### SSI Simplification

The process of evaluating eligibility and payment levels for the SSI program and addressing the accuracy of payments that have already been made is inherently complex. SSA remains committed to simplifying the SSI program and is exploring ways to do this in a fair and equitable manner.

### Debt Collection

SSA currently makes use of the following debt collection tools that are authorized by law: benefit withholding; cross-program recovery; repayment by installment agreements; Credit Bureau Reporting; Administrative Wage Garnishment; and the Treasury Offset Program (TOP), which includes Tax Refund Offset (TRO), Administrative Offset (e.g., Federal travel and expense reimbursements), and Federal Salary Offset. Using these debt collection tools, SSA collected \$1.2 billion in SSI overpayments, including Federally-administered state supplement overpayments, in FY 2015. Also in FY 2015, SSA eliminated an additional \$123.4 million through Netting, a process that adjusts SSI overpayments through an automated offset against SSI underpayments.

SSA began collecting SSI overpayments by TRO in 1998 under the authority of The Deficit Reduction Act of 1984. The Foster Care Independence Act of 1999 extended to the SSI program all of the additional debt collection authorities previously available for collection of overpayments under the Social Security retirement and disability programs. In FY 2002, SSA expanded the use of TOP by implementing Administrative Offset. SSA further expanded the use of TOP in FY 2006 when the agency implemented Federal Salary Offset, a collection tool used to collect delinquent overpayments owed by Federal employees, including employees who work for SSA. We again expanded our use of TOP in FYs 2012 and 2013. In FY 2012, we began referring debts delinquent for 10 years or longer to TOP<sup>1</sup> and in FY 2013, we began collecting delinquent debts via TOP through Treasury's State Reciprocal Program (SRP). The SRP allows States to enter into reciprocal agreements with Treasury to collect unpaid State debt by offset of Federal non-tax payments. In return, the agreements allow the Federal Government to collect delinquent non-tax debt by offset of State payments. In FY 2015, TOP enabled the agency to collect \$71.5 million in delinquent SSI overpayments.

In FY 2002, SSA implemented Credit Bureau Reporting and Cross Program Recovery. In FY 2015, Credit Bureau Reporting contributed to the voluntary repayment of almost \$30 million and the Agency recovered \$123.8 million via Cross Program Recovery.

In FY 2005, SSA implemented Administrative Wage Garnishment, which has collected \$27 million in SSI debt through FY 2015. In the future, SSA plans to implement the remaining authorized collection tools, which include interest charging, administrative cost recovery, and the use of private collection agencies.

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<sup>1</sup> In April 2014, some members of the public alleged that they received no prior notice that the Department of Treasury would offset their eligible payments to recover their delinquent overpayments. In response to the allegations, effective April 14, 2014, our Acting Commissioner ordered a halt of TOP referrals for debts 10 years or more delinquent, pending a thorough review of our responsibility and discretion under the law. Please refer to the legislative proposals section on page 170 of the LAE section for our proposed actions moving forward.

## Computer Matching Programs

SSA routinely matches SSI recipient data with data maintained by other Federal, state, and local government entities to detect changes in income, resources, or living arrangements that may affect SSI eligibility. In addition, the Foster Care Independence Act of 1999 provides for expansion of access to data from financial institutions.

SSA's computer matching operations include matches with:

- Prison inmate records to find recipients made ineligible by incarceration;
- Law enforcement agencies data on fugitive felons;
- Quarterly data on wage and unemployment compensation information;
- Monthly nursing home admission and discharge information;
- Internal Revenue Service records of non-wage income reported via 1099s to detect resources and/or income;
- Bureau of Public Debt's Savings Bond records to detect unreported assets;
- Department of Defense (DOD) records to detect and verify DOD pension information;
- Veterans Administration benefit data to be used in SSI benefit calculations;
- Office of Personnel Management pension data to be used in certain SSI benefit calculations;
- Railroad Retirement Board data to be used in certain SSI benefit calculations;
- Department of Homeland Security (DHS) data for deportation information on aliens outside the U.S. for more than 30 continuous days to terminate SSI benefits;
- DHS records of aliens who voluntarily leave the U.S; and
- AFI system to electronically request and receive financial account information.

Actions taken as a result of such matches include independent verification of assets or income. If this results in a change in payment amount or eligibility, notification is provided to the recipient of the findings along with appeal and waiver rights.

## Legislative Proposal – Refugees, Asylees, and Other Humanitarian Immigrants

Refugees and certain other humanitarian immigrants who are disabled or elderly are potentially eligible for SSI benefits for up to 7 years from the date they attained their immigration status, and without time limit if they become naturalized. The “SSI Extension for Elderly and Disabled Refugees Act” (Public Law 110-328) extended the 7-year SSI eligibility period for refugees, asylees, and certain other humanitarian immigrants to 9 years for FY 2009 through FY 2011. Effective October 2011, the SSI eligibility period for refugees and other humanitarian immigrants reverted to 7 years. This proposal would underscore the nation's commitment to

## **Supplemental Security Income Program**

refugees, asylees, and other humanitarian immigrants by again extending the time limit from 7 to 9 years during fiscal years 2017 and 2018.

Additional legislative proposals would:

- Hold facilitators liable for overpayments
- Authorize SSA to establish a computer match with the Department of Homeland Security's Customs and Border Protection data for purposes of enforcing lawful presence provisions
- Restore quarterly reporting of wages for individuals
- Conform treatment of state and local government earned income tax credits and child tax credits
- Develop a process to collect workers' compensation information from states and private insurers
- Authorize SSA to conduct a new CDR when fraud was involved in a prior CDR
- Authorize SSA to use all collection tools to recover funds
- Allow SSA to use commercial databases to verify real property
- Exclude SSA's debts from discharge in bankruptcy proceedings
- Eliminate SSI dedicated accounts
- Increase child support enforcement collections and expand their distribution
- Absolve older delinquent debts and prohibit use of the Treasury Offset Program for certain debts

For additional information regarding these proposals, refer to the legislative proposal summaries on page 170 of the LAE section.

### **Change in a Mandatory Program – Special Immigrant Visa Extension for Afghans**

The FY 2017 President's budget includes \$2 million for a discretionary change in a mandatory program (CHIMP) from the State Department's 2-year Special Immigrant Visa extension for Afghans. Please see the State Department's 2017 Congressional Justification for additional detail on this proposal.

## BUDGETARY RESOURCES

The SSI annual appropriation consists of a regular appropriation made available by the current year's appropriation bill and an advance made available by the prior year's appropriation. This advance is for Federal benefit payments in the first quarter of the subsequent fiscal year to ensure recipients continue to receive their benefits in case there is a delay in passing that year's appropriation bill. The President's Budget for FY 2017 is \$58,324,868,000, including \$14,500,000,000, provided in advance by the FY 2016 enacted appropriation.

**Table 2.4—Amounts Available for Obligation<sup>12</sup>**  
(in thousands)

	<b>FY 2015 Actual</b>	<b>FY 2016 Enacted<sup>3</sup></b>	<b>FY 2017 Estimate</b>
Regular Appropriation	\$ 41,232,978	\$ 45,229,733	\$ 43,824,868
Advanced Appropriation	\$ 19,700,000	\$ 19,200,000	\$ 14,500,000
<b>Total Annual Appropriation</b>	<b>\$ 60,932,978</b>	<b>\$ 64,429,733</b>	<b>\$ 58,324,868</b>
Federal Unobligated Balance	\$ 1,793,163	\$ 3,623,669	\$ 3,603,990
Recovery of Prior-Year Obligations	\$ 319,553	\$ 0	\$ 0
Offsetting Collections	\$ 711	\$ 0	\$ 0
Transfer from LAE <sup>4</sup>	\$ 0	\$ 63,000	\$ 44,000
<b>Subtotal Federal Resources</b>	<b>\$ 63,046,405</b>	<b>\$ 68,116,402</b>	<b>\$ 61,972,858</b>
State Supp. Reimbursements	\$ 2,634,456	\$ 2,657,000	\$ 2,680,000
State Supp. Unobligated Balance	\$ 218,842	\$ 220,968	\$ 7,968
<b>Total Budgetary Resources</b>	<b>\$ 65,899,703</b>	<b>\$ 70,994,371</b>	<b>\$ 64,660,826</b>
<b>Federal Obligations</b>	<b>\$ 59,422,736</b>	<b>\$ 64,512,412</b>	<b>\$ 61,646,258</b>
State Supp. Obligations	\$ 2,632,329	\$ 2,870,000	\$ 2,680,000
<b>Total Obligations</b>	<b>\$ 62,055,066</b>	<b>\$ 67,382,412</b>	<b>\$ 64,326,258</b>
Federal Unobligated Balance	\$ 3,623,669	\$ 3,603,990	\$ 326,600
State Supp. Unobligated Balance <sup>5</sup>	\$ 220,968	\$ 7,968	\$ 7,968
<b>Total Unobligated Balance</b>	<b>\$ 3,844,638</b>	<b>\$ 3,611,959</b>	<b>\$ 334,569</b>

<sup>1</sup> Does not include state supplementary user fees; user fees are included in the LAE appropriation.

<sup>2</sup> Totals may not add due to rounding.

<sup>3</sup> Federal benefit numbers reflect the most recent estimates from SSA's Office of the Chief Actuary.

<sup>4</sup> This is SSI's prorated share of unobligated LAE money that has been converted into no-year IT funds. It is not part of the annual administrative appropriation.

<sup>5</sup> The amount received for the October 1 payment, reimbursed at the end of September in the prior fiscal year, is available for use in the subsequent fiscal year.

## Supplemental Security Income Program

The SSI annual appropriation was \$60.9 billion in FY 2015. The FY 2016 appropriation is \$64.4 billion. SSA has the authority to carry over unobligated balances for use in future fiscal years for Federal benefit payments, administrative expenses, and beneficiary services because the amounts appropriated are made available until expended. Beginning in FY 2015, research and demonstration funds received three year appropriations; FY 2016 balances can be used through September 30, 2018. SSA carried over approximately \$3.6 billion in Federal unobligated balances into FY 2016. SSA expects to carry over approximately the same amount into FY 2017, and use over \$3.2 billion in federal benefit carryover in that year.

In addition to these appropriated amounts, SSA has spending authority in the amount of the advance reimbursement SSA receives from states to pay their state supplementary benefits. Because states reimburse SSA in advance, SSA carries over the amount received for the October 1 payment, reimbursed at the end of September in the prior fiscal year, for use in the subsequent fiscal year.

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### ANALYSIS OF CHANGES

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The FY 2017 request represents a decrease of approximately \$6 billion from the FY 2016 level. The majority of this decrease results from fewer Federal benefit payments in FY 2017 and carryover funds from FY 2016.

SSA plans to use unobligated balances to partially fund beneficiary services, early intervention projects and research and demonstration projects in FY 2016. In FY 2017, SSA plans to use unobligated balances to partially fund federal benefit payments, administrative expenses and research and demonstration projects. SSA plans to use approximately \$68 million in unobligated balances and recoveries in FY 2016 and approximately \$3,277 million in FY 2017.

#### **Federal Benefit Payments**

The decrease in the FY 2017 request for Federal benefit payments is a result of one fewer benefit payment and carryover funding from FY 2016, stemming from no FY 2016 COLA and lower beneficiary estimates. There is a slight increase in estimated payments due to the estimated FY 2017 cost of living adjustment (COLA). The increase in Federal benefit payments is partially offset by the impact of Old-Age, Survivors, and Disability Insurance (OASDI) COLAs on concurrent SSI/OASDI recipients. Since OASDI benefits are counted as income in the SSI program, the annual OASDI COLA decreases the SSI benefit payment for concurrent recipients.

#### **Administrative Expenses**

The FY 2017 request for administrative expenses is \$585 million more than the FY 2016 level. SSA expects to transfer \$63 million from the no-year LAE Information Technology Systems budget in FY 2016 for information technology needs. We expect to transfer an additional \$44 million in FY 2017. This transfer will not alter the overall spending levels in FY 2017, as reflected in the Limitation on Administrative Expenses section.

#### **Beneficiary Services**

SSA is requesting \$89 million in new authority for FY 2017. Our estimate reflects a steady level of payments to Employment Networks under the Ticket to Work program. In FY 2015, SSA

used \$70 million in budget authority and \$18.1 million in carryover for beneficiary services. SSA expects to use the remaining \$21 million of carryover funds in FY 2016, and no carryover funds in FY 2017 to cover our estimated obligations.

### Research and Demonstration

The FY 2017 combined request for research and early intervention demonstration projects is \$43 million less than the FY 2016 level; \$50 million less for Early Intervention Demonstration projects and an increase of \$7 million for other research and demonstration projects. SSA expects to use \$16.9 million of prior year unobligated balances in FY 2016, and \$5.2 million in FY 2017 to cover our estimated obligations.

In addition, our 2016 appropriation included \$50 million in funding for the Early Intervention Demonstration projects. SSA expects to use \$35 million of prior year unobligated balances in FY 2016 to cover our estimated obligations. We are not requesting any additional funding for Early Intervention Demonstration projects in FY 2017.

**Table 2.5—Summary of Changes<sup>1</sup>**

	<b>FY 2016 Enacted<sup>2</sup></b>	<b>FY 2017 Estimate</b>	<b>Change</b>
<b>Appropriation</b>	<b>\$ 64,429,733,000</b>	<b>\$ 58,324,868,000</b>	<b>- \$ 6,104,865,000</b>
Obligations Funded from Prior-Year Unobligated Balances and Recoveries net of estimated carryover from appropriation	+\$ 67,679,000	+\$ 53,126,000	- \$ 14,553,000
Reduction in Federal Benefits Request Due to Estimated Carryover from FY 2016	\$ 0	+\$ 3,224,264,000	+ \$ 3,224,264,000
Transfer from LAE <sup>3</sup>	+\$ 63,000,000	+\$ 44,000,000	- \$ 19,000,000
Administrative Expenses Unobligated Balances Carried Forward into FY 2017	-\$ 48,000,000	\$ 0	+ \$ 48,000,000
<b>Estimated Federal Obligations</b>	<b>\$ 64,512,412,000</b>	<b>\$ 61,646,258,000</b>	<b>- \$ 2,866,154,000</b>

<sup>1</sup> Does not include state supplementary payments and reimbursements or the corresponding state supplement user fee collections; user fees are included in the LAE appropriation. Totals may not add due to rounding.

<sup>2</sup> Federal benefit numbers reflect the most recent estimates from SSA's Office of the Chief Actuary.

<sup>3</sup> This is SSI's prorated share of unobligated LAE money that has been converted into no-year ITS funds. It is not part of the annual administrative appropriation.



**Table 2.6—Explanation of SSI Budget Changes from FY 2016 to FY 2017**  
(in thousands)

	<b>FY 2016 Obligations</b>	<b>Change from FY 2016</b>
		<b>Increases</b>
<b>Federal Benefit Payments</b>	\$ 59,610,000	
• COLA—0.8% beginning January 2017		+\$ 435,000
• Net increase due to adjustment for October 1, 2018 payment paid in FY 2017		+\$ 4,198,000
<b>Administrative Expenses</b>	\$ 4,648,733	
• Additional base funding		+ \$ 585,399
• Increase in amount of carryover funding planned for obligation in FY 2017		+ \$ 96,000
<b>Beneficiary Services</b>	\$ 70,000	
• Increase in base funding planned for obligation in FY 2017		+ \$ 19,000
<b>Research and Demonstrations</b>	\$ 51,000	
• Increase in base funding		+\$ 7,000
<b>Early Intervention</b>	\$ 50,000	
<b>CHIMP – New funding</b>		+ \$ 2,000
<b>Total Increases</b>		<b>+\$ 5,342,399</b>
		<b>Decreases</b>
<b>Federal Benefit Payments</b>		
• Effect of OASDI COLA for concurrent SSI/OASDI recipients		-\$ 102,000
• Net decrease in SSI recipients due to annualized closings		-\$ 7,975,000
<b>Administrative Expenses – Transfer from LAE</b>	\$ 15,000	
• Decrease in amount transferred from LAE in 2017		-\$ 19,000
<b>Beneficiary Services – Carryover</b>	\$ 21,000	
• Decrease in amount of carryover funding planned for obligation in FY 2017		-\$ 21,000
<b>Research &amp; Demonstration – Net Carryover</b>	\$ 11,679	
• Decrease in amount of carryover funding planned for obligation in FY 2017		-\$ 6,553
<b>Early Intervention – Carryover</b>	\$ 35,000	
• Decrease in amount of carryover funding planned for obligation in FY 2017		-\$ 85,000
<b>Total Decreases</b>		<b>- \$ 8,208,553</b>
<b>Total Obligations Requested, Net Change</b>	<b>\$ 64,512,412</b>	<b>- \$ 2,866,154</b>

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**NEW BUDGET AUTHORITY AND OBLIGATIONS BY ACTIVITY**


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The table below displays budget authority and obligations for the four main SSI activities—Federal benefit payments, administrative expenses, beneficiary services, research and early intervention demonstration projects, as well as the State Department’s two-year special immigrant visa extension for Afghans.

**Table 2.7—New Budget Authority and Obligations by Activity**<sup>1</sup>  
(in thousands)

	<b>FY 2015 Actual</b>	<b>FY 2016 Enacted<sup>23</sup></b>	<b>FY 2017 Estimate<sup>4</sup></b>
<b><u>Federal Benefit Payments</u></b>			
Appropriation	\$ 56,201,000	\$ 59,610,000	\$ 52,941,736
Obligations	\$ 54,706,388	\$ 59,610,000	\$ 56,166,000
Monthly Check Payments	12	13	12
<b><u>Administrative Expenses<sup>5</sup></u></b>			
Appropriation	\$ 4,578,978	\$ 4,648,733	\$ 5,234,132
Obligations	\$ 4,579,570	\$ 4,663,733	\$ 5,326,132
<b><u>Beneficiary Services</u></b>			
Appropriation	\$ 70,000	\$ 70,000	\$ 89,000
Obligations	\$ 88,126	\$ 91,000	\$ 89,000
<b><u>Research and Demonstration</u></b>			
Appropriation	\$ 48,000	\$ 51,000	\$ 58,000
Obligations	\$ 48,653	\$ 62,679	\$ 63,126
<b><u>Special Immigrant Visas</u></b>			
Appropriation	\$ 0	\$ 0	\$ 2,000
Obligations	\$ 0	\$ 0	\$ 2,000
<b><u>Early Intervention Demonstrations</u></b>			
Appropriation	\$ 35,000	\$ 50,000	\$ 0
Obligations	\$ 0	\$ 85,000	\$ 0
<b>Total Appropriation</b>	<b>\$ 60,932,978</b>	<b>\$ 64,429,733</b>	<b>\$ 58,324,868</b>
<b>Total Federal Obligations</b>	<b>\$ 59,422,736</b>	<b>\$ 64,512,412</b>	<b>\$ 61,646,258</b>

<sup>1</sup> Totals may not add due to rounding.

<sup>2</sup> SSA expects to use carryover of prior year unobligated balances and recoveries for FY 2016 obligations as follows: beneficiary services, \$21 million; early intervention demonstration projects, \$35 million; and research and demonstration projects, \$11.7 million.

<sup>3</sup> Federal benefit numbers reflect the most recent estimates from SSA’s Office of the Chief Actuary.

<sup>4</sup> In addition to the FY 2017 President’s Budget request, SSA expects to use carryover of prior year unobligated balances and recoveries for FY 2017 obligations as follows: federal benefits, \$3,224 million; administrative expenses, \$48 million; and research and demonstration projects, \$5.1 million.

<sup>5</sup> This includes the SSI’s prorated share of unobligated LAE money that has been converted into no-year IT funds. It is not part of the annual administrative appropriation.

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**NEW BUDGET AUTHORITY AND OBLIGATIONS BY OBJECT**


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In the table below, “Other Services” includes administrative expenses and beneficiary services, as well as the State Department’s two-year special immigrant visa extension for Afghans.

**Table 2.8—New Budget Authority and Obligations by Object <sup>1</sup>**  
(in thousands)

	<b>FY 2015 Actual</b>	<b>FY 2016 Enacted<sup>2</sup></b>	<b>FY 2017 Estimate</b>
<u>Other Services<sup>3</sup></u>			
Appropriation	\$ 4,648,978	\$ 4,718,733	<b>\$ 5,325,132</b>
Obligations	\$ 4,667,695	\$ 4,754,733	<b>\$ 5,417,132</b>
<u>Federal Benefits and Research</u>			
Appropriation	\$ 56,284,000	\$ 59,711,000	<b>\$ 52,999,736</b>
Obligations	\$ 54,755,041	\$ 59,757,679	<b>\$ 56,229,126</b>
<b>Total Appropriation</b>	<b>\$ 60,932,978</b>	<b>\$ 64,429,733</b>	<b>\$ 58,324,868</b>
<b>Total Obligations</b>	<b>\$ 59,422,736</b>	<b>\$ 64,512,412</b>	<b>\$ 61,646,258</b>

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<sup>1</sup> Totals may not add due to rounding.

<sup>2</sup> Federal benefit numbers reflect the most recent estimates from SSA’s Office of the Chief Actuary

<sup>3</sup> The administration portion of these services includes the SSI’s prorated share of unobligated LAE money that has been converted into no-year IT funds. It is not part of the annual administrative appropriation.

## BACKGROUND

### AUTHORIZING LEGISLATION

The SSI program is authorized by Title XVI of the Social Security Act. Section 1601 of the Act authorizes such sums as are sufficient to carry out the Title.

**Table 2.9—Authorizing Legislation**

	<b>FY 2015 Actual</b>	<b>FY 2016 Enacted<sup>1</sup></b>	<b>FY 2017 Estimate</b>	<b>FY Amount Authorized</b>
Title XVI of the Social Security Act, Section 401 of P.L. 92-603 and Section 212 of P.L. 93-66, as amended, and Section 405 of P.L. 92-216	\$ 60,932,978,000	\$ 64,429,733,000	<b>\$ 58,324,868,000</b>	<i>Indefinite</i>
First Quarter Advance Appropriation for Subsequent Fiscal Year	\$ 19,200,000,000	\$ 14,500,000,000	<b>\$ 15,000,000,000</b>	---

<sup>1</sup> Federal benefit numbers reflect the most recent estimates from SSA's Office of the Chief Actuary.

## APPROPRIATION HISTORY

The table below displays the President's Budget request, amounts passed by the House and Senate, and the actual amount appropriated, for the period FY 2007 to FY 2018. Indefinite budget authority is requested when actual Federal benefit payments exceed the amounts available for Federal benefit payments in a given fiscal year.

**Table 2.10—Appropriation History**

Fiscal Year	Budget Estimate to Congress	House Committee Passed	Senate Committee Passed	Enacted Appropriation
Q1 Advance	\$ 11,110,000,000	\$ 11,110,000,000	\$ 11,110,000,000	\$ 11,110,000,000
Current Year	\$ 29,125,000,000	\$ 29,065,000,000 <sup>1</sup>	\$ 29,023,000,000 <sup>2</sup>	\$ 29,071,169,000 <sup>3</sup>
<b>2007 Total</b>	<b>\$ 40,235,000,000</b>	<b>\$ 40,175,000,000</b>	<b>\$ 40,133,000,000</b>	<b>\$ 40,181,169,000</b>
Q1 Advance	\$ 16,810,000,000	\$ 16,810,000,000	\$ 16,810,000,000	\$ 16,810,000,000
Current Year	\$ 26,911,000,000	\$ 26,948,525,000 <sup>4</sup>	\$ 26,959,000,000 <sup>5</sup>	\$ 27,000,191,000 <sup>6</sup>
<b>2008 Total</b>	<b>\$ 43,721,000,000</b>	<b>\$ 43,758,525,000</b>	<b>\$ 43,769,000,000</b>	<b>\$ 43,810,191,000</b>
Q1 Advance	\$ 14,800,000,000	\$ 14,800,000,000	\$ 14,800,000,000	\$ 14,800,000,000
Current Year	\$ 30,414,000,000	-- <sup>7</sup>	\$ 30,429,875,000 <sup>8</sup>	\$ 30,471,537,000 <sup>9</sup>
<b>2009 Total</b>	<b>\$ 45,214,000,000</b>	<b>---</b>	<b>\$ 45,229,875,000</b>	<b>\$ 45,271,537,000</b>
<i>2009 Indefinite</i>				<i>\$ 1,602,935,179</i>
Q1 Advance	\$ 15,400,000,000	---	\$ 15,400,000,000	\$ 15,400,000,000
Current Year	\$ 34,742,000,000	\$ 34,742,000,000 <sup>10</sup>	\$ 34,742,000,000 <sup>11</sup>	\$ 34,742,000,000 <sup>12</sup>
<b>2010 Total</b>	<b>\$ 50,142,000,000</b>	<b>---</b>	<b>\$ 50,142,000,000</b>	<b>\$ 50,142,000,000</b>
<i>2010 Indefinite</i>				<i>\$ 458,465,781</i>
Q1 Advance	\$ 16,000,000,000	\$ 16,000,000,000	\$ 16,000,000,000	\$ 16,000,000,000
Current Year	\$ 40,513,000,000	-- <sup>13</sup>	\$ 40,513,000,000 <sup>14</sup>	\$ 39,983,273,000 <sup>15</sup>
<b>2011 Total</b>	<b>\$ 56,513,000,000</b>	<b>---</b>	<b>\$ 56,513,000,000</b>	<b>\$ 55,983,273,000</b>
Q1 Advance	\$ 13,400,000,000	No Data <sup>16</sup>	\$ 13,400,000,000	\$ 13,400,000,000
Current Year	\$ 38,083,000,000 <sup>16</sup>	No Data <sup>17</sup>	\$ 37,922,543,000 <sup>18</sup>	\$ 37,582,991,000 <sup>19</sup>
<b>2012 Total</b>	<b>\$ 51,483,000,000<sup>20</sup></b>	<b>---</b>	<b>\$ 51,322,543,000</b>	<b>\$ 50,982,991,000</b>
<i>2012 Indefinite</i>	<i>No Data</i>	<i>No Data</i>	<i>No Data</i>	<i>\$ 560,000,000</i>
Q1 Advance	\$ 18,200,000,000	No Data <sup>21</sup>	\$ 18,200,000,000	\$ 18,200,000,000
Current Year	\$ 40,043,000,000 <sup>21</sup>	No Data <sup>22</sup>	\$ 40,043,000,000 <sup>23</sup>	\$ 32,782,991,000 <sup>24</sup>
<b>2013 Total</b>	<b>\$ 58,243,000,000<sup>25</sup></b>		<b>\$ 58,243,000,000</b>	<b>\$ 50,982,991,000</b>
2013 Rescission				\$ 32,779,347,000
2013 Sequester <sup>26</sup>				
Q1 Advance	\$ 19,300,000,000		\$ 19,300,000,000	\$ 19,300,000,000
Current Year	\$ 40,737,000,000 <sup>27</sup>		\$ 40,568,741,000 <sup>28</sup>	\$ 41,249,064,000 <sup>29</sup>
<b>2014 Total</b>	<b>\$ 60,037,000,000<sup>30</sup></b>		<b>\$ 59,868,741,000</b>	<b>\$ 60,549,064,000</b>

Table Continues on the Next Page

## Supplemental Security Income Program

Fiscal Year	Budget Estimate to Congress	House Committee Passed	Senate Committee Passed	Enacted Appropriation
Q1 Advance	\$ 19,700,000,000		\$ 19,700,000,000	\$ 19,700,000,000
Current Year	\$ 40,927,000,000	No Data	No Data	\$ 41,232,978,000 <sup>31</sup>
<b>2015 Total</b>	<b>\$ 60,627,000,000</b>			<b>\$ 60,932,978,000<sup>32</sup></b>
Q1 Advance	<b>\$ 19,200,000,000</b>			<b>\$ 19,200,000,000</b>
Current Year	\$ 46,422,000,000	\$46,232,978,000 <sup>33</sup>	\$ 46,110,777,000 <sup>34</sup>	\$ 46,305,733,000 <sup>35</sup>
<b>2016 Total</b>	<b>\$ 65,622,000,000</b>	<b>\$ 65,432,978,000</b>	<b>\$ 65,310,777,000</b>	<b>\$ 65,505,733,000<sup>36</sup></b>
Q1 Advance	<b>\$ 14,500,000,000</b>	\$ 14,500,000,000	\$ 14,500,000,000	
Current Year	\$ 43,824,868,000			
<b>2017 Total</b>	<b>\$ 58,324,868,000</b>			
Q1 Advance	<b>\$ 15,000,000,000</b>			
Current Year				
<b>2018 Total</b>				

<sup>1</sup> H.R. 5647.

<sup>2</sup> S. 3708

<sup>3</sup> Revised Continuing Appropriations Resolution, 2007 (P.L. 110-5). Of this amount, \$2,937,000,000 was available for administrative expenses.

<sup>4</sup> H.R. 3043.

<sup>5</sup> S. 1710.

<sup>6</sup> Consolidated Appropriations Act, 2008 (P.L. 110-161). The amount does not include a rescission of \$53,671,177 for SSI administrative expenses and \$349,400 for research and demonstration projects in accordance with P.L. 110-161.

<sup>7</sup> The House Committee on Appropriations did not report a bill.

<sup>8</sup> S. 3230.

<sup>9</sup> Omnibus Appropriations Act, 2009 (P.L. 111-8).

<sup>10</sup> H.R. 3293.

<sup>11</sup> H.R. 3293, reported from Committee with an amendment.

<sup>12</sup> Consolidated Appropriations Act, 2010 (P.L. 111-117).

<sup>13</sup> The House Committee on Appropriations did not report a bill.

<sup>14</sup> S. 3686.

<sup>15</sup> The Department of Defense and Full-Year Continuing Appropriations Act, 2011 (P.L. 112-10). Of this amount, \$3,493,273,000 was available for administrative expenses. The amount does not include a rescission of \$6,987,000 for SSI administrative expenses and \$72,000 for research and demonstration projects in accordance with P.L. 112-10.

<sup>16</sup> Of this amount, not to exceed \$10,000,000 was for Supplemental Security Income Program-related performance-based awards for Pay for Success projects and not more than \$10,000,000 was to provide incentive payments and

## Supplemental Security Income Program

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to conduct a rigorous evaluation of a demonstration project designed to improve the outcomes for SSI child recipients and their families.

<sup>17</sup> The House Committee on Appropriations did not report a bill. Appropriations Chairman Rehberg introduced H.R. 3070, which included \$38,062,428,000 for fiscal year 2012. Of this amount, not more than \$17,428,000 was made available for research and demonstrations under sections 1110 and 1114 of the Social Security Act and remain available until the end of fiscal year 2013. Up to \$10,000,000 of the research funds were to provide incentives payments and to conduct a rigorous evaluation of a demonstration project designed to improve the outcomes for SSI child recipients and their families. In addition, H.R. 3070 included \$18,200,000,000 for benefit payments for the first quarter of fiscal year 2013.

<sup>18</sup> S. 1599.

<sup>19</sup> Consolidated Appropriations Act, 2012 (P.L. 112-74). Of this amount, not more than \$8,000,000 was made available for research and demonstrations under sections 1110 and 1144 of the Social Security Act. The amount does not include a rescission of \$6,377,000 for SSI administrative expenses and \$2,000 for research and demonstration projects in accordance with P.L. 112-74.

<sup>20</sup> The President's Budget proposed to provide \$140 million in cap adjustment funding in FY 2012, consistent with section 251(b)(2)(B) of the Balanced Budget and Emergency Deficit Control Act of 1985, as amended. Of the \$140 million, the SSI portion totaled \$46 million.

<sup>21</sup> Of this amount, not more than \$48,000,000 was for research and demonstrations under sections 1110, 1115 and 1144 of the Social Security Act.

<sup>22</sup> The House Committee on Appropriations did not report a bill. The Committee posted a draft bill which included \$39,335,614,000 for fiscal year 2013. Of this amount, not more than \$8,000,000 was made available for research and demonstrations under sections 1110 and 1144 of the Social Security Act and to remain available until the end of fiscal year 2014. In addition, the draft bill included \$19,300,000,000 for benefit payments for the first quarter of fiscal year 2014.

<sup>23</sup> S. 3295.

<sup>24</sup> Consolidated and Further Continuing Appropriations Act, 2013 (P.L. 113-6).

<sup>25</sup> The President's Budget proposed to provide \$266 million in mandatory administrative funding in FY 2013. Of the \$266 million, the SSI portion totals \$106 million.

<sup>26</sup> SSI was exempt from sequestration in FY 2013.

<sup>27</sup> Of this amount, not more than \$54,000,000 is for research and demonstrations under sections 1110, 1115 and 1144 of the Social Security Act.

<sup>28</sup> S. 1284.

<sup>29</sup> Consolidated Appropriations Act, 2014 (P.L. 113-76).

<sup>30</sup> The President's Budget proposed to provide \$1.2 billion in mandatory administrative funding in FY 2014. Of the \$1.2 billion, the SSI portion totals \$587 million.

<sup>31</sup> Consolidated and Further Continuing Appropriations Act, 2015 (P.L. 113-235).

<sup>32</sup> Of this amount, not more than \$48,000,000 is for research and demonstrations and not more than \$35,000,000 is for early intervention demonstrations under sections 1110, 1115 and 1144 of the Social Security Act.

<sup>33</sup> H.R. 3020.

<sup>34</sup> S. 1695

<sup>35</sup> Consolidated Appropriations Act, 2016 (P.L. 114-113).

<sup>36</sup> Of this amount, not more than \$101,000,000 is for research and demonstrations under sections 1110, 1115 and 1144 of the Social Security Act.

## FEDERAL BENEFIT PAYMENTS

**Authorizing Legislation:** Section 1602, 1611, and 1617 of the Social Security Act.

### PURPOSE AND METHOD OF OPERATION

The SSI program was established to pay needy aged, blind and disabled individuals a minimum level of income through Federally-administered monthly cash payments. In many cases, these payments supplement income from other sources, including Social Security benefits and state programs. In FY 2017, SSA estimates benefit payments will total approximately \$56.2 billion for more than 8.2 million Federal SSI recipients.

**Table 2.11—Federal Benefit Payments: New Budget Authority and Obligations  
(in thousands)**

	<b>FY 2015 Actual</b>	<b>FY 2016<sup>1</sup> Enacted</b>	<b>FY 2017 Estimate</b>	<b>FY 16 to FY 17 Change</b>
<b>Appropriation</b>	<b>\$ 56,201,000</b>	<b>\$ 59,610,000</b>	<b>\$ 52,941,736</b>	<b>- \$ 6,668,264</b>
<b>Obligations</b>	<b>\$ 54,706,388</b>	<b>\$ 59,610,000</b>	<b>\$ 56,166,000</b>	<b>- \$ 3,444,000</b>
Advance for subsequent fiscal year	\$ 19,200,000	\$ 14,500,000	\$ 15,000,000	+ \$ 500,000

### RATIONALE FOR BUDGET REQUEST

SSA is requesting \$52.9 billion in new budget authority for Federal benefit payments in FY 2017.

SSA estimates benefit payments based on a number of interrelated factors including the number of SSI recipients, number of applications, award and termination rates, cost-of-living adjustments, maximum benefit rates, average payment amounts and number of payments per fiscal year.

<sup>1</sup> Federal benefit numbers reflect the most recent estimates from SSA's Office of the Chief Actuary.



## SSI RECIPIENT POPULATION

The number of Federal SSI recipients has increased from 7.9 million in FY 2012 to 8.2 million in FY 2015 and is expected to remain at 8.2 million through FY 2017. The estimated increase in Federal recipients in FY 2017 represents a 0.02 percent increase over the FY 2016 level. SSA estimates the number of SSI recipients by analyzing a number of factors including applications, award and termination rates, and funding for program integrity initiatives.

**Table 2.12—SSI Recipients, Actual <sup>1</sup>**  
(average over fiscal year, in thousands)

	<b>FY 2012</b>	<b>FY 2013</b>	<b>FY 2014</b>	<b>FY 2015</b>
Aged	1,094	1,089	1,094	1,100
Blind or Disabled	6,846	7,000	7,076	7,073
<b>Total Federal</b>	<b>7,940</b>	<b>8,089</b>	<b>8,171</b>	<b>8,173</b>
<b>Year-to-Year Change</b>	<b>2.4%</b>	<b>1.9%</b>	<b>1.0%</b>	<b>0.0%</b>
State Supplement Only	234	220	217	171
<b>Total Federally Administered</b>	<b>8,173</b>	<b>8,309</b>	<b>8,388</b>	<b>8,344</b>

In addition to Federal SSI recipients, SSA currently administers state supplementary payments for 20 states and the District of Columbia. SSA administers payments for approximately 1.6 million state supplement recipients, of which approximately 170,000 do not receive a Federal SSI benefit and only receive the state supplementary payment.

**Table 2.13—SSI Recipients, Projected<sup>1</sup>**  
(average over fiscal year, in thousands)

	<b>FY 2016 Estimate</b>	<b>FY 2017 Estimate</b>	<b>FY 16 FY 17 Change</b>
Aged	1,106	1,111	+ 0.5%
Blind or Disabled	7,113	7,126	+ 0.2%
<b>Total Federal</b>	<b>8,219</b>	<b>8,237</b>	<b>+ 0.2%</b>
State Supplement only	170	173	+ 1.8%
<b>Total Federally Administered</b>	<b>8,389</b>	<b>8,410</b>	<b>+ 0.3%</b>

<sup>1</sup> Totals may not add due to rounding.

## SSI Disabled vs. Aged Recipient Population

The number of Federal blind or disabled SSI recipients as a percentage of all Federal SSI recipients has steadily increased from 81 percent in FY 2000 to 86.5 percent in FY 2015. Because the average monthly benefit payment for blind or disabled recipients is higher than that of aged recipients, this consistent shift in the population make-up increases overall Federal SSI benefit payments.

**Table 2.14—Blind or Disabled Recipients as a Percentage of Total <sup>1</sup>**  
(average over fiscal year, in thousands)

Fiscal Year	Total Federal	Aged	Blind or Disabled	Blind or Disabled as % of Total
2000	6,328	1,203	5,125	<b>81.0%</b>
2008	7,117	1,103	6,014	<b>84.5%</b>
2009	7,304	1,106	6,198	<b>84.9%</b>
2010	7,522	1,105	6,417	<b>85.3%</b>
2011	7,756	1,105	6,652	<b>85.8%</b>
2012	7,940	1,094	6,846	<b>86.2%</b>
2013	8,089	1,089	7,000	<b>86.5%</b>
2014	8,171	1,094	7,076	<b>86.6%</b>
2015	8,173	1,100	7,073	<b>86.5%</b>
<b>2016 Estimate</b>	<b>8,219</b>	<b>1,106</b>	<b>7,113</b>	<b>86.5%</b>
<b>2017 Estimate</b>	<b>8,237</b>	<b>1,111</b>	<b>7,126</b>	<b>86.5%</b>

## Concurrent SSI/OASDI Recipients

SSI recipients also receiving Old-Age and Survivors Insurance (OASI) or DI benefits have their SSI benefit reduced, less applicable exclusions, by the amount of their OASDI benefit. Approximately 33 percent of all SSI recipients (including those only receiving a state supplement) also receive Social Security benefits. Approximately 56 percent of the SSI aged and 30 percent of the SSI blind and disabled populations receive concurrent payments.

<sup>1</sup> Totals may not add due to rounding.

## BENEFIT PAYMENTS

### Maximum Monthly Federal Payments

The maximum monthly federal benefit rate (FBR) is increased each January when there are increases in the cost-of-living. There is no cost of living increase in 2016. An increase of 0.8 percent is projected for January 2017. The FBR remained \$733 for an individual and \$1,100 for a couple for calendar years (CY) 2015 and 2016. SSA estimates the FBR will increase to \$739 for an individual and \$1,109 for a couple in CY 2017. The COLA will be effective in January 2017, raising the maximum benefit rate to higher levels than the first 3 months of the fiscal year.

**Table 2.15—Maximum Benefit Rates**

	FY 2016		FY 2017	
	First 3 Months	Last 9 Months	First 3 Months	Last 9 Months
Individual	\$ 733	\$ 733	\$ 733	\$ 739
Couple	\$ 1,100	\$ 1,100	\$ 1,100	\$ 1,109

### Average Monthly Benefit Payments

The amount actually paid to a recipient can vary from the FBR based on their income received (e.g., earnings and Social Security benefits) and the living arrangement of the recipient (e.g., residence in one's own home, the household of another person, or in a nursing home which meets Medicaid standards). The average monthly benefit is expected to increase from \$551 in FY 2015 to \$556 in FY 2016 and \$561 in FY 2017. The increase in the average benefit payment is driven by COLAs and recipient population characteristics.

**Table 2.16—Average Monthly Benefit Payments**

	FY 2015 Actual	FY 2016 Estimate	FY 2017 Estimate
Aged	\$ 390	\$ 396	\$ 402
Blind or Disabled	\$ 576	\$ 580	\$ 586
All SSI Recipients	\$ 551	\$ 556	\$ 561

### Cost of Living Adjustments

When applicable, COLAs increase both the maximum and average monthly benefit payment. However, for concurrent SSI/OASDI recipients, increases in SSI benefit payments are partially offset by increases in Social Security benefits resulting from the same COLA. Social Security benefits are counted as income in the SSI program. Therefore, any increase in Social Security benefits resulting from the annual COLA increases countable income in the SSI benefit computation.

### Program Integrity Funding

Annual benefit payment estimates are dependent on SSA performing a certain level of SSI CDRs and redeterminations. Specifically, the FY 2017 estimate assumes SSA receives the proposed administrative funding to conduct almost 621,000 SSI CDRs and 2,822,000 non-medical redeterminations.

### Timing of Monthly Benefit Payments

Monthly SSI benefit payments are made on the first of the month, unless the first falls on a weekend or Federal holiday. In that case, the payment is made on the prior business day at the end of the previous month. When October 1 falls on a weekend or Federal holiday, the payment is made in the prior fiscal year at the end of September. This timing of payments results in 11, 12, or 13 payments in a given fiscal year.

**Table 2.17—Check Payments by Fiscal Year**

	<b>Number of Check Payments</b>	<b>Federal Benefit Obligations</b>
FY 2008	12	\$ 41,309,722,313
FY 2009	12	\$ 44,987,045,867
FY 2010	12	\$ 47,322,385,581
FY 2011	13	\$ 52,274,301,053
FY 2012	11	\$ 47,003,477,518
FY 2013	12	\$ 52,782,740,412
FY 2014	12	\$ 53,849,499,196
FY 2015	12	\$ 54,706,388,000
<b>FY 2016</b>	<b>13</b>	<b>\$ 59,610,000,000</b>
<b>FY 2017</b>	<b>12</b>	<b>\$ 56,166,000,000</b>

## ADMINISTRATIVE EXPENSES

**Authorizing Legislation:** Sections 201(g)(1) of the Social Security Act.

### PURPOSE AND METHOD OF OPERATION

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Administrative expenses for the SSI program are funded from general revenues. Section 201(g)(1) of the Social Security Act provides that administrative expenses for the SSI program, including Federal administration of state supplementary payments, may be financed from the Social Security trust funds with reimbursement, including any interest lost, to the trust funds from general revenues.

This appropriation funds the SSI program share of administrative expenses incurred through the Limitation on Administrative Expenses (LAE) account. Amounts appropriated are available for current-year SSI administrative expenses, as well as for prior-year administrative expenses that exceeded the amount available through this account for the prior year. If those excess prior year amounts were paid out of the Social Security trust funds, then current year SSI funds must be used to reimburse these trust funds with interest.

The legislative history of the 1972 amendments (which established this funding mechanism) indicates a desire to obtain economy of administration by giving SSA the responsibility for the SSI program because of its existing field office network and its administrative and automated data processing facilities. Because of the integration of the administration of the SSI and Social Security programs, it was desirable to fund them from a single source (the LAE account). This requires that the trust funds and the SSI account pay their appropriate shares. The determination is based on a Government Accountability Office (GAO) approved method of cost analysis of the respective expenses of the SSI and Social Security insurance programs, and mandates a final settlement by the end of the subsequent fiscal year as required by law.

**Table 2.18—Administrative Expenses: New Budget Authority and Obligations**  
(in thousands)

	<b>FY 2015 Actual</b>	<b>FY 2016 Enacted</b>	<b>FY 2017 Estimate<sup>1</sup></b>	<b>FY 16 to FY 17 Change</b>
<b>Total Appropriation</b>	<b>\$ 4,578,978</b>	<b>\$ 4,648,733</b>	<b>\$ 5,234,132</b>	<b>+ \$ 585,399</b>
Obligations Funded from Prior-Year Unobligated Balance	+ \$ 592	+ \$ 0	+ \$ 48,000	+ \$ 48,000
Altmeyer Renovation Carryover Funds		-\$ 48,000	+ \$ 0	+ \$ 48,000
Transfer from LAE	+ \$ 0	+ \$ 63,000	+ \$ 44,000	- \$ 19,000
<b>Obligations</b>	<b>\$ 4,579,570</b>	<b>\$ 4,663,733</b>	<b>\$ 5,326,132</b>	<b>+ \$ 662,399</b>

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#### RATIONALE FOR BUDGET REQUEST

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The FY 2017 request for SSI administrative expenses is \$5,234,132,000. This appropriation is used to reimburse the trust funds for the SSI program's share of administrative expenses. This amount includes additional funding of \$1,342 million specifically for FY 2017 SSI program integrity activities.

These amounts exclude funding made available in the LAE account from state user fees for SSA expenses for administering SSI state supplementary payments. The LAE account assumes funding of up to \$136,000,000 for SSI state supplementary user fees in FY 2016 and up to \$126,000,000 in FY 2017.

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<sup>1</sup> Based on our latest estimates, obligations exceed budget authority in FY 2017 by \$92 million. We plan to transfer the SSI's prorated share of unobligated LAE money that has been converted into no-year IT funds to account for the difference. This ITS fund is not part of the annual administrative appropriation.

## BENEFICIARY SERVICES

**Authorizing Legislation:** Sections 1148 and 1615(d) of the Social Security Act

### PURPOSE AND METHOD OF OPERATION

Beneficiary services consist of the Vocational Rehabilitation (VR) and Ticket to Work programs. The objective of the programs is to help disabled individuals achieve and sustain productive, self-supporting work activity.

**Table 2.19—Beneficiary Services: New Budget Authority and Obligations**  
(in thousands)

	<b>FY 2015 Actual</b>	<b>FY 2016 Enacted</b>	<b>FY 2017 Estimate</b>	<b>FY 16 to FY 17 Change</b>
<b>Appropriation</b>	<b>\$ 70,000</b>	<b>\$ 70,000</b>	<b>\$ 89,000</b>	<b>+ \$ 19,000</b>
Obligations Funded from Prior-Year Unobligated Balances	\$ 18,126	\$ 21,000	\$ 0	- \$ 21,000
<b>Obligations</b>	<b>\$ 88,126</b>	<b>\$ 91,000</b>	<b>\$ 89,000</b>	<b>- \$ 2,000</b>
Vocational Rehabilitation	\$ 79,303	\$ 82,000	\$ 79,000	- \$ 3,000
Ticket to Work	\$ 8,823	\$ 9,000	\$ 10,000	+ \$ 1,000

In the VR program, SSA repays state VR agencies for the reasonable and necessary costs of services that successfully rehabilitate disabled SSI recipients. VR agencies are successful when a disabled recipient performs substantial gainful activity for a continuous period of nine months out of twelve.

A portion of the FY 2016 obligations in the above table will cover estimated payments authorized by the Ticket to Work and Work Incentives Improvement Act of 1999 (P.L. 106-170). Under the Ticket program, SSA pays Employment Networks (ENs) for providing vocational rehabilitation, employment, and other support services to disabled SSI recipients. Recipients select an EN (including state VR agencies), which SSA pays in exchange for services that may reduce reliance on federal cash benefits.

Ticket payments, unlike VR reimbursement payments, are not based on the costs of specific services provided by the EN. SSA pays ENs on either an outcome-milestone payment method or an outcome-payment method. Under the outcome-milestone payment method, SSA pays the EN for each milestone the recipient successfully achieves. The recipient may continue to receive monthly benefit payments when SSA issues a milestone payment. In contrast, SSA will begin issuing outcome payments only after the individual's monthly benefit payments cease. SSA bases outcome-payment amounts on the prior year's national average disability benefit payable

under Title XVI. Outcome payments are payable for a maximum of 60 months (consecutive or otherwise).

### RATIONALE FOR BUDGET REQUEST

SSA is requesting \$89 million in new budget authority for beneficiary services in FY 2017. SSA will use prior-year unobligated balances to cover a portion of FY 2016 obligations.

In the Ticket to Work program, the estimate for FY 2017 assumes a total of 5,600 Ticket beneficiaries with payments to an EN, an increase from 5,000 in FY 2016.

In the VR Reimbursement program, the estimate for FY 2017 assumes a total of 6,900 distinct beneficiaries with significant work and for which reimbursement are paid, a decrease from 7,300 in FY 2016. For SSI-only recipients, the FY 2017 average cost per VR reimbursement payment is \$17,800 for an estimated 3,500 payments. For recipients concurrently receiving SSI and DI, the FY 2017 average SSI cost per VR reimbursement payment is \$5,000 for an estimated 3,400 payments. In FY 2016, the average cost per VR reimbursement to SSI-only recipients is \$17,300 for an estimated 3,700 payments. For SSI and DI concurrent recipients, the FY 2016 average SSI cost per VR reimbursement is \$5,000 for an estimated 3,600 payments.

SSA continues its ongoing efforts to improve management and oversight of the current VR program, to ensure program effectiveness, and to make certain the money spent is a good investment. This effort includes an ongoing quality review of state claims for reimbursement and continuing internal audits of the agency's payment process.

**Table 2.20—SSI VR Reimbursement and Ticket to Work Payments**

<b>SSI VR Reimbursement Payments</b>	<b>FY 2015 Actual</b>	<b>FY 2016 Estimate</b>	<b>FY 2017 Estimate</b>	<b>FY 16 to FY 17 Change</b>
Number of SSI-Only Awards	3,843	3,700	3,500	- 200
SSI-Only Cost per Payment	\$ 16,991	\$ 17,300	\$ 17,800	+ \$ 500
Number of SSI/DI Concurrent Awards	3,070	3,600	3,400	- 200
SSI/DI Concurrent Payment (SSI portion of costs only)	\$ 4,657	\$ 5,000	\$ 5,000	+ \$ 0
<b>Total Number of SSI VR Reimbursement Awards</b>	<b>6,913</b>	<b>7,300</b>	<b>6,900</b>	<b>- 400</b>
<b>Total SSI VR Reimbursement Payments (in thousands)<sup>1</sup></b>	<b>\$ 79,593</b>	<b>\$ 82,000</b>	<b>\$ 79,000</b>	<b>- \$ 3,000</b>
<b>Ticket Beneficiaries with Payments (SSI-Only &amp; SSI/DI Concurrent Beneficiaries for whom we served and paid an EN)</b>	<b>4,755</b>	<b>5,000</b>	<b>5,600</b>	<b>+ 600</b>
<b>Total Ticket Payments (in thousands)<sup>1</sup></b>	<b>\$ 8,543</b>	<b>\$ 9,000</b>	<b>\$ 10,000</b>	<b>+ \$ 1,000</b>

<sup>1</sup> Payments shown do not necessarily equal outlays due to reporting lags.



## MUSCULAR DYSTROPHY AND THE SSI AND SSDI PROGRAMS

This section provides statistics on SSDI and SSI recipients who have a diagnosis code indicating muscular dystrophy as a primary or secondary impairment. Not all individuals with muscular dystrophy will be on SSA's rolls because some may not meet the child or adult definitions of disability in the law or may not meet other program requirements such as sufficient work in Social Security covered employment or having income or resources below the SSI thresholds.

Data on the number of individuals with muscular dystrophy in the overall United States population is incomplete, according to components within the Department of Health and Human Services (HHS). However, for context, we note that Duchenne muscular dystrophy is the most common form among children and, thus, most likely reflected in statistics on SSI children. In addition, Duchenne and Becker (which is similar to but less severe than Duchenne) muscular dystrophy primarily affect males. The Centers for Disease Control estimates one in every 5,600 to 7,700 males ages 5 through 24 in the United States has Duchenne or Becker muscular dystrophy. Finally, for adults, we note the most common form of muscular dystrophy is myotonic muscular dystrophy.<sup>1</sup>

In December 2013, there were a total of 38,313 SSDI and SSI beneficiaries ages 0 to 66 with a primary or secondary diagnosis of muscular dystrophy who were in current payment status in that month (the data do not allow us to break out the type of muscular dystrophy). Among this group, 35,152 are adult beneficiaries. See Table 2.21.<sup>2</sup>

**Table 2.21 – Beneficiaries with Muscular Dystrophy by Beneficiary Type  
in Current Pay Status, December 2013**

Beneficiary Type	Number	Percent
Adult SSDI only	22,636	59.1
Adult SSI only	9,249	24.1
Adult concurrent	3,267	8.5
SSI child	3,161	8.3
<b>Total</b>	<b>38,313</b>	<b>100.0</b>

There are 3,161 children on SSI with a diagnosis of muscular dystrophy or about one out of every 420 child recipients on SSI. Most of these children are male (74 percent); one out of every 376 male children on SSI have an impairment code indicating muscular dystrophy.

<sup>1</sup> Please see <https://www.nichd.nih.gov/health/topics/musculardys/conditioninfo/pages/types.aspx> and <http://www.cdc.gov/ncbddd/muscardystrophy/data.html>.

<sup>2</sup> Source: Program statistics are based on SSA tabulations of administrative records.

Table 2.22 provides additional information on the child population. Most begin receiving benefits at a very young age. The average age for the start of benefits is five. Twenty-five percent of child recipients are receiving benefits by age two and 50 percent are receiving benefits by age four. Nearly 80 percent of child recipients with muscular dystrophy were receiving benefits by age eight.

**Table 222 – Age at First Benefit, Child Recipients, Ages 0-17  
with Muscular Dystrophy in December 2013**

<b>Child Age</b>	<b>Number</b>	<b>Percent</b>
0-1	803	25.4
2-4	811	25.7
5-8	844	26.7
9-17	703	22.2
<b>Total</b>	<b>3,161</b>	<b>100.0</b>

The average age of child recipients is 10 (not shown in Table 2.22). One-quarter of child recipients were under the age of seven in December 2013, and three-quarters were under the age of 14.

#### *Employment activities of Adult beneficiaries with Muscular Dystrophy*

For this section of the note, we expand the population under study to include not only adults who are in current pay in December 2013, but also adults that have had benefits suspended or terminated due to work. There are 36,116 such beneficiaries with an impairment code indicating muscular dystrophy.

Among such individuals:

- 3,868 (11%) have participated in the Ticket To Work (TTW) program, receiving services from either an Employment Network (EN) or a State Vocational Rehabilitation Agency (VR).
  - The vast majority of this group (94%) received services through VR. For this population, VR may be in the best position to offer needed and intensive educational and work supports.
- 964 (3%) had benefits suspended due to work in December 2013 or had their SSDI or SSI benefits terminated in the past due to work.

#### *Allowance rates for Child and Adult beneficiaries with Muscular Dystrophy*

We also examined application records since 2008 and found 1,563 cases with Muscular Dystrophy listed as the impairment, and “Duchenne” included under the claim’s allegation description. These cases had a very high allowance rate at 88%. Allowance rates were highest for the very young and those older than age 10. Among this group:

## **Supplemental Security Income Program**

- Those less than age 1 at the time of application were allowed at a rate of 87%.
- Those older than age 10 were allowed at a rate of 96%.
- The allowance rate for those between the ages of 1 and 10 was 80%.

## RESEARCH, DEMONSTRATION PROJECTS, AND OUTREACH

**Authorizing Legislation:** Sections 1110, 1115, and 1144 of the Social Security Act.

### PURPOSE AND METHOD OF OPERATION

SSA conducts extramural research, demonstrations, and outreach under sections 1110, 1115, 1144, and 234 of the Social Security Act. Projects funded under section 234 are not a part of this appropriations request.

**Table 23 - Research, Outreach, and Early Intervention Demonstration Projects:  
Budget Authority and Obligations  
(in thousands)**

	<b>FY 2015 Actual</b>	<b>FY 2016 Enacted</b>	<b>FY 2017 Estimate</b>	<b>FY 16 to FY 17 Change</b>
Research Appropriation	\$ 48,000	\$ 51,000	\$ 58,000	+ \$ 7,000
Early Intervention Appropriation	\$ 35,000	\$ 50,000	\$ 0	- \$ 50,000
<b>Total Appropriation</b>	<b>\$ 83,000</b>	<b>\$101,000</b>	<b>\$58,000</b>	<b>- \$ 43,000</b>
Unobligated Balance	\$ 16,702	\$ 51,882	\$ 5,203	- \$46,679
Recovery of Prior-Year Obligations	\$ 833	\$ 0	\$ 0	
Offsetting Collections	\$ 0	\$ 0	\$ 0	
<b>Total Budgetary Resources</b>	<b>\$100,535</b>	<b>\$ 152,882</b>	<b>\$ 63,203</b>	<b>- \$ 89,679</b>
<b>Total Obligations</b>	<b>\$ 48,653</b>	<b>\$ 147,679</b>	<b>\$63,126</b>	<b>- \$ 84,553</b>
Total Unobligated Balance	\$ 51,882	\$ 5,203	\$ 77	- \$5,126

Section 1110 of the Social Security Act provides authority for conducting broad-based cross-programmatic projects for OASDI and SSI programs. This includes both waiver authorities for the SSI program, as well as projects dealing with specific SSI issues. Under the authority of section 1110, we fund a range of extramural projects: disability policy research, projects to develop effective rehabilitation and return-to-work strategies, financial literacy and education, retirement policy research, evaluations of proposed or newly enacted legislative changes, and projects to maintain and improve basic data about our programs and beneficiaries.

Section 1115 provides the Secretary of Health and Human Services (HHS) with the funding and authority to waive compliance with Medicaid requirements for the purpose of allowing states to participate in SSA's research and disability demonstration projects.

Section 1144 requires SSA to conduct outreach to those individuals with Medicare who are potentially eligible for state-administered Medicaid programs or Medicare prescription drug subsidies under Medicare Part D. We identify these potential beneficiaries, inform them about these programs, and notify state Medicaid agencies. The Centers for Medicare & Medicaid Services, within HHS, oversees both the Medicare and Medicaid programs.

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### RESEARCH INVESTMENT CRITERIA

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To help ensure that our research and demonstration projects reflect the agency's long-term priorities and support the objectives of our Agency Strategic Plan, we have established guidelines for developing, managing, and vetting projects for potential inclusion in our long-term research and demonstration agenda. We employ a variety of methods to ensure: 1) that we meet the funding requirements of the sections of the Act that authorize our extramural research and demonstration activities; and 2) that our extramural research activities meet high standards for relevance, quality, and performance. This section of our justification highlights some of the steps we take to ensure that our research activities meet high standards:

#### Relevance

The extramural research budget undergoes careful scrutiny both within SSA and by external monitoring authorities. A fundamental step in SSA's review is assuring that each project responds to current issues facing the Social Security retirement, disability and/or SSI programs. Our internal review process includes obtaining the advice and recommendations of researchers with technical expertise, program managers, and Agency executives. We also receive input on our research program from the Social Security Advisory Board.

Internal reviews also help to ensure that funded activities reflect SSA's strategic goals and objectives, help us respond to legislative requirements and address high-priority issues. Many of our extramural research activities are directed toward providing policymakers and the public with the analytical and data resources they need to assess the implementation of existing SSA programs and the implications of reform proposals.

Our budget request reflects our support of the Administration's and Congress' ongoing goal to provide opportunities for disability beneficiaries to maximize their self-sufficiency through work. For example, we are working collaboratively with the Department of Labor (DOL), the Department of Education (ED), and HHS in this area to test interventions that will improve the postsecondary education and employment outcomes of children who receive SSI. Existing studies indicate a lack of effective retirement planning on the part of the public. Our budget also includes provisions to increase the American public's basic financial management skills. For example, we support projects funded under the Financial Literacy and Education Commission (FLEC).

#### Quality

We use a competitive, merit-based procurement process to ensure that our extramural research program produces high quality results. We award nearly all of our extramural research projects conducted by private-sector organizations through competitive contracts or cooperative agreements.

We also make use of technical evaluation panels to review projects while they are in progress and to provide feedback and suggestions to the agency and its contractors. These panels include internal experts in relevant disciplines, such as statistics, economics, and survey design. They help ensure that SSA-sponsored research projects are methodologically sound and consistent with professional standards. In addition, the research projects that we sponsor through the Retirement Research Consortium (RRC) and Disability Research Consortium (DRC) are often discussed in a formal, external setting, via seminars or workshops.

### Performance

We carry out our extramural research and evaluation projects primarily through contracts, jointly funded cooperative agreements, and grants that identify specific deliverables and timetables. The agency has sent a strong message to contractors that they must complete projects on time and within budget. Contracting Officer Technical Representatives (COTR), project officers, administrative staff, and senior executives monitor the progress of all research contracts and agreements.

Consistent with the Administration's encouragement to support evidence-based evaluations, we produce reports and data files for each research and evaluation project in an effort to determine whether existing or proposed programs are working as they should. Where appropriate, we make these reports publicly available or announce their availability in the *Social Security Bulletin* and on the Web. The RRC also disseminates output at annual meetings, on the Web, and through a variety of publications, workshops, and conferences. Finally, agency funded research projects based on the Survey of Income and Program Participation (SIPP), the Health and Retirement Study (HRS), or the Model of Income in the Near Term (MINT) model are widely cited in both peer-reviewed publications and the mainstream press.

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## RATIONALE FOR BUDGET REQUEST

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We are requesting \$58 million in new budget authority in FY 2017 for research projects designed to explore potential improvements to our programs. This level will allow continued support for key Congressional and long-standing SSA priorities such as the development of the Occupational Information System (OIS), our rigorous evaluation of the Promoting Readiness of Minors in SSI (PROMISE) pilot, and the National Academy of Sciences/Institute of Medicine's independent evaluation of the disability program for adults and children. The request also provides funding for our Interagency Agreement (IAA) with the National Institutes of Health (NIH) to help quickly and efficiently identify individuals who should be awarded disability benefits.

In FY 2017, we plan to continue our efforts to ensure that policymakers and the public have access to objective, scientific and methodologically sound data and analysis as the dialogue on how to strengthen and reform Social Security continues. In support of this effort, we plan to continue funding the RRC, which will continue to maintain our capability to produce policy-relevant research on retirement, and the DRC, which will continue to address a shortage of disability policy research and foster collaborative research with other federal agencies that serve individuals with disabilities.

The table and discussion that follow present the research and outreach efforts we plan to fund in FY 2017 in more detail.

**24—Major Research Areas and Outreach:  
Obligations and New Budget Authority  
(in thousands)<sup>1,2</sup>**

	Obligations <sup>3</sup>		
	FY 2015 Actual	FY 2016 Enacted	FY 2017 Estimate
<b>Serve the Public through a Stronger and more Responsive Disability Program</b>	<b>\$ 30,211</b>	<b>\$ 46,890</b>	<b>\$ 47,602</b>
Advisory Services to Assist. SSA with Disability Issues	\$ 1,424	\$ 4,440	\$ 1,380
Disability Analysis File (DAF)	\$ 769	\$ 810	\$ 800
Disability Determination Process Small Grants	\$ 300	\$ 300	\$ 300
Disability Research Consortium (DRC)	\$ 5,000	\$ 5,500	\$ 4,400
National Beneficiary Survey (NBS)	\$ 300	\$ 3,324	\$ 1,500
New and Emerging Research – Disability	\$ 0	\$ 668	\$ 500
NIH IAA for Data Analytics/FAB Development	\$ 2,040	\$ 3,060	\$ 5,478
Occupational Information Systems (OIS)	\$ 16,540	\$ 24,709	\$ 30,008
Promoting Readiness of Minors in SSI (PROMISE)	\$ 3,838	\$ 4,079	\$ 3,236
<b>Deliver Innovative Quality Services</b>	<b>\$ 4,304</b>	<b>\$ 5,495</b>	<b>\$ 5,305</b>
Understanding Americans Study (UAS) Enhancements	\$ 1,488	\$ 1,490	\$ 2,000
Collaboration with Other FLEC Members	\$ 0	\$ 960	\$ 480
Enterprise Business Platform	\$ 1,071	\$ 1,000	\$ 1,000
New and Emerging Research – Retirement	\$ 314	\$ 300	\$ 250
Medicare Outreach	\$ 1,431	\$ 1,745	\$ 1,575
<b>Strengthen the Integrity of Our Programs</b>	<b>\$ 14,138</b>	<b>\$ 10,295</b>	<b>\$10,219</b>
Census Surveys	\$ 3,375	\$ 0	\$ 0
Data Development	\$ 339	\$ 365	\$ 364
Health & Retirement Study (HRS)	\$ 2,655	\$ 2,655	\$ 2,655
Health & Retirement Study Supplement	\$ 1,300	\$ 1,500	\$ 1,500
Retirement Income Modeling	\$ 0	\$ 0	\$ 1,000
Retirement Research Consortium (RRC)	\$ 5,994	\$ 5,500	\$ 4,400
Social Security Programs Throughout the World	\$ 275	\$ 299	\$ 300
<b>Subtotal Research Obligations</b>	<b>\$ 48,653</b>	<b>\$ 62,679</b>	<b>\$ 63,126</b>
<b>Early Intervention Obligations</b>	<b>\$ 0</b>	<b>\$ 85,000</b>	<b>\$ 0</b>
<b>Total Research Obligations</b>	<b>\$ 48,653</b>	<b>\$147,679</b>	<b>\$ 63,126</b>
<b>New Budget Authority</b>	<b>\$ 83,000</b>	<b>\$101,000</b>	<b>\$ 58,000</b>

<sup>1</sup> Does not include funding authorized under section 234.

<sup>2</sup> Totals may not add due to rounding.

<sup>3</sup> This amount includes obligations funded from prior-year unobligated balances.

## MAJOR RESEARCH AND OUTREACH PROJECTS

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Although our extramural research budget represents a small piece of our overall funding, our research and demonstration projects help us to significantly increase the efficiency and accuracy of our mission-critical work. Below is a detailed summary, by category, of the major research and demonstration projects we plan to conduct in FY 2017:

### **Serve the Public through a Stronger, more Responsive Disability Program**

The Social Security and SSI disability programs are the largest Federal programs providing assistance to people with disabilities. Eliminating the disability hearings backlog and improving the disability process are two of our top priorities. Key projects in support of this effort include:

#### *Advisory Services to Assist SSA with Disability Issues/Institute of Medicine (IOM)*

As part of our efforts to continuously improve the administration and effectiveness of our disability programs, in FY 2013 we entered into a new 5-year contract with the IOM. The IOM established a standing committee of medical experts to assist us with ongoing and emerging disability issues at step 3 (Listing of Impairments--see below), step 4, and step 5 of the sequential evaluation process. Having independent medical experts involved in our process helps to further maintain the objectivity of our policy and procedures. Additionally, the current contract also provides for Federal Advisory Committee Act (FACA)-compliant IOM consensus committees of medical and other experts.

In FY 2013, we awarded a task order that provided for a consensus study committee tasked with describing past and current trends in the prevalence and persistence of mental disorders for the general U.S. population under age 18, and providing a comparison between those trends and trends in the SSI childhood disability population. We received this committee's final report in October 2015. The committee concluded that the number of children that receive SSI benefits for mental disorders has remained relatively stable. The committee found that, after taking child poverty into account, the increase in the percentage of poor children receiving SSI benefits for mental disorders (from 1.88 percent in 2004 to 2.09 percent in 2013) is consistent with and proportionate to trends in prevalence of mental disorders among children in the general population.

In FY 2014, we awarded a task order that provided for a consensus study committee tasked with performing a critical review of selected psychological testing, including symptom validity testing (SVT), that could contribute to our disability determinations. We received this committee's final report on psychological testing in June 2015. The committee verified that, where appropriate, there is value in standardized psychological testing, including both non-cognitive measures and cognitive tests. The committee also concluded that validity tests alone do not provide information about whether or not an individual is disabled. These findings support our current practice of considering the results of standardized psychological tests when they are part of the record, but not ordering validity tests alone.

In FY 2014, we also awarded a task order that provided for a consensus study committee tasked with describing past and current trends in the prevalence and persistence of speech disorders and



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language disorders for the general U.S. population under age 18, and providing a comparison between those trends and trends in the SSI childhood disability population. We expect to receive this committee's final report in April 2016. Lastly in FY 2014, we awarded a task order that provided for an IOM-established FACA-compliant consensus study committee tasked with providing recommendations to improve the accuracy and efficiency of our policy and procedures for capability determinations for adult beneficiaries. We expect to receive this committee's final reports in May 2016.

In FY 2015, we awarded a task order that provides for a consensus study committee to provide an overview of assistive devices that relate to physical and mental disorders and functioning for adults (including young adults as they transition from high school to the workplace); and provide a comprehensive review of selected assistive devices that relate to physical and mental disorders and functioning for adults (including young adults as they transition from high school to the workplace). The selected assistive devices that the committee will study include wheeled/seated mobility devices and upper extremity prostheses. SSA addresses, to some extent, the use of assistive devices, such as canes, crutches, walkers, lower extremity prostheses, and eyeglasses, and how these devices affect a person's ability to perform basic work activities (for example standing or walking) in its current disability determination process.

In FY 2016, we plan to use an IOM-established FACA-compliant consensus study committee to provide a comprehensive list of programs, services, and treatments available (nationally, regionally, and locally) for improving health outcomes among SSI children (of all ages) with mental, speech, and language disorders; provide a comprehensive, analytical review of effective and evidence-based programs, services, and treatments that improve health outcomes for SSI children and youth while in school and as they transition from high school to the workplace or higher education; and provide findings and conclusions for SSA involvement, policy development, and future research.

### List of Impairments

Since 2004, we have updated approximately 70 percent of the listings and we plan to propose revisions in the Federal Register for all listings by the end of 2020. Comprehensive revisions pending include:

Mental disorders (final rule in agency clearance process), neurological (final rule in agency clearance process), respiratory system (final rule in agency clearance process), and musculoskeletal system (proposed rule in agency internal review process).

For combinations of impairments, our current regulations state that, if we find that a person has a severe, medically determinable combination of impairments, then we consider the combined effect of the impairments throughout the disability determination process. In FY 2017, we plan to use a consensus study committee to identify listing criteria (symptoms, signs, and laboratory findings) for disabling combinations of impairments, and identify medical profiles that result in an inability to sustain a baseline of work functioning.

Disability Analysis File (DAF)

The DAF has been previously funded under the former “other research” line item. The DAF is a composite of the ten most relevant SSA administrative files needed to answer questions about disability and work. The DAF pulls these files together into a meaningful whole that researchers can easily understand and use. The DAF also provides complete researcher-friendly documentation of the data for these files. As a result, having a standing DAF file eliminates the first 6-12 months of investigation and start-up assembly of the data for every new research project that uses it and is essential in providing quick responses to agency inquiries. The DAF proved to be an essential tool in FY 2015 for providing disability data and analysis in response to inquiries from Congress and other Federal agencies, including the Office of Management and Budget. Using the DAF allowed us to make data-driven policy recommendations and changes. In FY 2016, we will continue to build the DAF and use this tool for quick turnaround inquiries and analysis.

Disability Determination Process Small Grants Program

This grant program provides 1-year stipends to graduate and post-doctoral students to conduct disability research, including research that supports the identification of more claims for fast-tracking under the CAL/Quick Disability Determination process. Other potential research topics include: an examination of severity thresholds in medical conditions that meet CAL criteria; variability across states and regions of disability determination and the diary date for periodic medical review; whether current medical listings provide consistent consideration regarding the use of assistive technology for disability determination purposes; the potential for predictive modeling and focusing on information collection instruments; and the relationship between homelessness and disability.

In September 2011, we awarded a 5-year grant to Policy Research Inc. (PRI) to run the small grant program. PRI targeted graduate programs in public health, social work, occupational medicine, vocational and rehabilitation counseling, public policy and administration, sociology, psychology, education, economics, medicine, and law. Each of the teams PRI convenes to review the proposals will include at least one person with a disability.

PRI approved eight stipend awards for the first cohort, 10 stipend awards for the second cohort, 11 stipend awards for the third cohort, six stipend awards for the fourth cohort, and 11 stipend awards for the fifth cohort. Applications for the sixth cohort are due to PRI by March 1, 2016.

Please see the following PRI website for a list of the awarded projects and accepted final reports: <http://ddp.policyresearchinc.org/completed-projects/>. We will re-compete the grant in FY 2016. The re-competed grant will focus on rehabilitation, work and the disability program.

Disability Research Consortium (DRC)

We awarded the fourth year of the DRC cooperative agreements with the Mathematica Policy Research center and the National Bureau of Economic Research center in September 2015. This funding supports the production and dissemination of program and policy-relevant research to assist policymakers in improving services and benefits from the DI and SSI programs. The DRC

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supports research to better understand how programs that provide services and benefits to people with disabilities (Federal and nonfederal) intersect and interact with each other. This will help develop policy to improve service delivery, enhance coordination of services across programs, build on complementarities across programs, eliminate duplication and waste, and advance cooperation across Federal agencies that serve people with disabilities.

An analysis conducted using the RAND American Life Panel (ALP) explored the population where a health-related workplace accommodation would increase ability to work, as well as the volume of these accommodations. The study has five key findings. First, 35 percent of people between the ages of 18 to 70 report health problems that affect their work performance. Second, a sizeable group of people report receiving health-related accommodations from their employers, but do not report work limitations per se. The authors' interpretation of this finding is that these individuals do not experience work limitations precisely because their health problems are fully accommodated. Third, the order of the questions in disability surveys matters. The authors found evidence that people understate accommodations when first asked about very severe disabilities. Fourth, when all respondents were asked about health-related workplace accommodations (not just those reporting work limitations), the measured accommodation rate was substantially higher. The ALP estimates that the rate of accommodation among accommodation-sensitive individuals who are employed is about 60 percent, two to three times higher than existing estimates in the literature. Finally, they find that 54 to 59 percent of accommodation-sensitive individuals (both employed and not employed) would benefit from some kind of employer accommodation to either sustain or commence work. This estimate of unmet need for accommodation is substantially lower than previous estimates, though still economically large.

Other recent DRC studies have provided descriptive information on the DI/SSI populations. These studies address questions about the economic resources, consumption, and poverty of beneficiaries; the characteristics of beneficiaries who work; and geographic differences in disability claiming.

The DRC centers will continue research activities across six broad priority research areas: demographics, economics, health, programmatic issues, work and education, and international comparisons. These topics will be guided by the agenda for the consortium's research projects for FY 2017. In addition, the DRC will continue to train future experts on disability issues and policy through summer research training fellowships, dissertation support, and pre- and post-doctoral fellowships.

### National Beneficiary Survey (NBS)

The NBS collects data from a national sample of DI and SSI beneficiaries and a sample of Ticket to Work (TTW) participants that are not available from any other source. We have used the NBS to provide information on our programs and beneficiaries to answer questions for SSA, other Federal agencies, the Government Accountability Office (GAO), and Congress. The NBS is available as a public use file on Data.gov and the SSA website.

From the NBS, we have learned about the health and socio-demographic characteristics of our SSI and DI beneficiaries with disabilities, including their physical and mental health status, functional limitations, education, health insurance, household living arrangements, and income. Beyond this basic information, we have also examined the work aspirations of beneficiaries with disabilities, their use of employment-related services, and their work activities and outcomes.

The NBS has provided us with detailed information on wages, hours of work, benefits, work accommodations and unmet needs, and the barriers beneficiaries face as they try to work. NBS data tell us that nearly half of all beneficiaries are interested in work and many are pursuing employment goals. The data also tell us that many barriers to work remain. Beneficiaries tend to have activity limitations, poor health, and low levels of education that limit their employment opportunities. Many rely on public programs where benefits may be limited by work and earnings. Many also experience work-specific obstacles, such as a lack of reliable transportation, inaccessible workplaces, and discouragement from work, either by others or through their own experiences.

We completed the first four rounds of the NBS in 2004, 2005, 2006, and 2010. We completed 27,000 interviews across the first four rounds of the NBS. In FY 2012, we began to make changes in the NBS to collect more information on the factors associated with successful and unsuccessful work attempts and less information on the TTW program. In the redesigned NBS, new questions focus on the home, community, employer, and SSA policies that influence successful work attempts. In 2015, we completed interviews for the first of three rounds of the redesigned NBS, including 4,000 interviews of the national sample of SSI and DI beneficiaries and 90 in-depth interviews of the most successful working beneficiaries. From the information we learned from the in-depth interviews, we developed the new questions and the design of the larger sample of the most successful working beneficiaries. We plan to conduct the second and third rounds of the national sample and the sample of the most successful working beneficiaries in FY 2017 and FY 2019.

Public use data files, documentation, and reports for the first four rounds of the NBS are available on our website at: <http://www.ssa.gov/disabilityresearch/nbs.html>. The report of the in-depth interviews will be available in March 2016. The draft findings, data, and documentation for the 2015 national sample will also be available in March 2016.

#### *New and Emerging Research - Disability*

Our New and Emerging Research –Disability line item replaces the former “Other Research” category and includes projects that provide broad program analysis and development in support of the DI and SSI programs. These projects typically include studies of program policy issues, the identification of trends in the disability programs, the formulation of agency policy regarding cross-cutting programs or issues related to disability and/or income assistance programs, and the development and implementation of policy and procedures on DI and SSI work incentives. Often, these projects address necessary but unforeseen requests for studies from Congress, OMB, the Administrative Conference of the United States, or our leadership, which are typically quick turnaround projects regarding policy priorities. In FY 2016, we plan to pursue a collaboration with the Department of Education to encourage disability-related research at minority serving colleges and institutions.

National Institutes of Health (NIH) IAA for Data Analytics and FAB Development

Under an agreement with their Office of Extramural Research, NIH provides in-depth analysis of our existing data and contracts with Boston University (BU) in developing a work disability functional assessment battery (FAB). The FAB will provide accurate and uniform information about individuals' self-reported functional ability that we can use to inform our data collection and determination processes.

In FY 2015, NIH continued an analysis of potential Compassionate Allowances (CAL) conditions using an expanded and updated database. The CAL initiative identifies diseases and other medical conditions that invariably qualify for allowance under our Listing of Impairments. The initiative allows us to target the most obviously disabled individuals for allowances based on objective medical information that we can obtain quickly. We currently have 225 CAL conditions. Likewise, BU furthered development of the FAB's functional domains, and conducted a national calibration study of the entire FAB item pool. Functional domains organize body function into areas descriptive of what a person can do in their usual environment. The item pool consists of statements that elicit responses to indicate limitations in specific functional domains. To date, our partnership has resulted in a productive cross-governmental relationship, significant cost-sharing, and scientifically and legally defensible research.

In FY 2016, BU will finalize the basic domain structure of the FAB, conclude the national calibration study, and initiate a predictive validity study of the FAB instrument. In addition, NIH will finish development of an empirical method for nominating new candidates for our CAL list.

In FY 2017 NIH will continue to explore data-driven methods to inform our data collection and determination processes, and will work with BU to replenish and scientifically enhance the rigor of the existing FAB instrument.

Occupational Information System (OIS)

We are developing a new OIS that will replace the Dictionary of Occupational Titles (DOT) as the primary source of occupational information in our disability adjudication process. The Department of Labor has not updated the DOT since 1991. In 2012, the Bureau of Labor Statistics (BLS) began conducting feasibility tests to determine whether they could collect the type of occupational information we need, using the platform of the National Compensation Survey (NCS). BLS calls this data collection effort the Occupational Requirements Survey (ORS). In September 2015, after three years of successful testing, BLS began collecting production data that our adjudicators will eventually use to make disability decisions. The first production collection cycle will take 3 years. We hope that disability adjudicators can begin using the new data in 2019. In the future, we intend to update the data annually under an agreement with BLS to ensure we use current occupational data to adjudicate our disability claims.

Once completed, the new OIS will include many occupational descriptors similar to those adjudicators currently use in the DOT. However, the OIS will expand on DOT information by describing the basic mental and cognitive requirements of work. The OIS will incorporate ORS

data, elements from DOL's Occupational Information Network (O\*NET), and will crosswalk to the Military Occupational Classification (MOC). The new OIS will combine these data in a web-based, publicly available information technology (IT) platform that will filter and sort the data as needed to adjudicate disability claims and will eventually integrate with our internal electronic case processing systems.

We signed yearly IAAs with BLS for FY 2013 through FY 2015 to continue testing. In FY 2013, BLS tested collecting the physical and skill requirements of occupations and workers' environmental exposure. After each of three test phases, BLS consulted with SSA, evaluated data collection issues, and refined the data collection protocols and processes.

In FY 2014, the BLS resolved outstanding issues identified in FY 2013 and tested collecting new data elements, such as the mental and cognitive requirements of work. BLS also contracted with an expert to evaluate internal research regarding the methods of occupational data collection and approaches for testing the validity and reliability of the data. In accordance with the report recommendations, BLS conducted a job observation test during the summer of 2015 to compare the data collected during pre-production to those collected through direct job observation. The testing indicates high levels of agreement across most elements. For elements with lower levels of agreement, the testing can be used to provide additional guidance to both field economists and the respondent to aid in estimating. BLS will consider continuing to select a subsample of occupations for direct observation as a quality assurance measure. The complete report can be found on the BLS website at [http://www.bls.gov/ncs/ors/preprod\\_job\\_ob.pdf](http://www.bls.gov/ncs/ors/preprod_job_ob.pdf).

In FY 2014, we also began working with Northrop Grumman through our Information Technology Support Services Contract. We started developing the requirements for the front-end instrument that will pull together the occupational data BLS is collecting, the O\*NET data, and the Military Occupation Code crosswalks.

In early FY 2015, BLS started the nationwide pre-production test to prepare for production data collection. During pre-production testing, we continued working with BLS to evaluate and refine the survey elements describing the mental and cognitive requirements of work to ensure this information meets the needs of our adjudicators. BLS released the pre-production test data in September 2015. BLS also applied for clearance from OMB to implement production data collection, which began in September 2015. BLS also started researching the rate at which occupations change in order to inform decisions about the OIS lifecycle. We continued working with Northrop Grumman to outline system requirements for the OIS IT platform, developed an OIS prototype, and outlined a plan to test the platform using pre-production data.

In FY 2016, BLS will complete the first round of production data collection, and start the second year. In the last quarter of FY 2016, Northrop Grumman will complete the development of an IT application that will allow us to conduct a usability test using pre-production data. We will work with the Office of Disability Policy to develop training and roll out plans, and consider policy changes that will allow us to use the new data more efficiently.

In the first quarter of FY 2017, BLS will release estimates from the first year of collection. BLS will release the second year of production data to us by the end of 2017 and the third year by the

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end of 2018. Before the end of this first 3-year cycle of production data collection, we will work with BLS to identify the best method to update data into the future to capture requirements of occupations important to disability adjudication.

The current IAA with BLS ends at the end of FY 2016, and we plan to renew it annually, providing our collaboration continues to be successful.

We use Section 1110 funding for all OIS research and development contracts, while LAE funds the salaries and benefits of the SSA employees managing the project and for the development of the platform that will house the OIS data. More information regarding this project is available at our OIS website: [https://www.ssa.gov/disabilityresearch/occupational\\_info\\_systems.html](https://www.ssa.gov/disabilityresearch/occupational_info_systems.html).

### Promoting Readiness of Minors in SSI (PROMISE)

PROMISE is a joint pilot demonstration program with ED, HHS, and DOL. The goal of the program is to test interventions that improve the health, education, and post-school outcomes of children who receive SSI, including the completion of postsecondary education and employment. It is also intended to improve family or household outcomes through improved services and supports, such as education and job training for parents.

In FY 2013, ED's Office of Special Education and Rehabilitation Services awarded competitive grants to five states and one consortium of states. States are using these funds to improve coordination and increase the use of existing services for which children receiving SSI and their families are already eligible. These services are available through the Individuals with Disabilities Education Act, the Vocational Rehabilitation State Grants program, Medicaid's Care Coordination Services, Job Corps, and other Workforce Investment Act programs.

Developing and conducting a rigorous evaluation to guide implementation, gather evidence, and validate incentive payments is a key component of PROMISE. In FY 2012, we convened a technical advisory panel to help prioritize the evaluation needs of this project. In FY 2013, we awarded a contract to evaluate PROMISE pilot interventions and in FY 2014, our evaluation contractor provided technical assistance to the state grantees and will begin randomly assigning youth into treatment and control groups. In FY 2015, our contractor continued random assignment and technical assistance, conducted site visits and focus groups, and delivered early assessments of the recruitment and enrollment process. In FY 2016, we have begun collecting data for the first national evaluation survey and will conduct additional site visits and focus groups. Enrollment and random assignment into PROMISE will end in April 2016. Our contractor will also begin work on the process analyses, the first of which will be due in early FY 2017. In FY 2017, our contractor will continue conducting surveys, conduct the final site visits, and finish the site-specific process analyses.

## Deliver Innovative Quality Service

### Understanding Americans Study (UAS) Enhancements

The UAS is an innovative, nationally representative longitudinal internet panel. Through a jointly financed cooperative agreement with National Institute on Aging (NIA), our support will



maintain the sample size we funded in prior fiscal years. It will also allow for additional data improvements that support policy-relevant research and evidence-based decision-making. Planned data enhancements include:

- Increasing the sample size so that we can conduct more robust retirement security research on the American public to inform SSA's targeted outreach efforts to specific populations, including young workers and those nearing retirement; and
- Maintaining a Quick Turnaround Project fund for directly testing and answering emerging research questions from internal and external policy makers.

The UAS enhancements allow SSA to make more informed decisions about initiating new policies, procedures, and educational products designed to enhance retirement security. The UAS data also serves the public because the sample we support is available for researchers inside and outside of SSA to use in addressing research questions. For example, the Society of Actuaries have used the information in the UAS to help inform their research efforts to better understand families with income in the middle quartiles so they can possibly create products that will make this segment of the population less reliant on Social Security retirement benefits in old age. In addition, the Financial Literacy and Education Commission (FLEC) has used data from the UAS in their publications about the public's knowledge of Social Security programs and from whom the public seeks financial advice. With the exception of our staff time related to administering the funding agreement, the cost associated with our UAS enhancement is charged to our Section 1110 appropriation.

### *Collaboration with Other FLEC Members*

In FY 2016, we are continuing our focus on collaborative initiatives designed to improve retirement security among vulnerable populations. One component of this effort is to support activities of Federal agencies that are members of the FLEC. The FLEC, established by Congress in 2003, is a consortium of more than twenty Federal departments, agencies, and other entities working together toward the goal of improving the financial literacy and education of persons in the United States. Coordinating extramural research efforts on financial literacy and retirement security with other Federal agencies allows SSA to minimize redundancy, identify best practices, share results, and leverage existing investments.

In FY 2017, we plan to continue supporting jointly funded cooperative agreements with ED, a key FLEC partner. Our extramural research partnership with ED builds on existing programs to foster retirement security-related research at Historically Black Colleges and Universities (HBCUs) and other minority-serving institutions. This partnership, launched in FY 2011, is consistent with [Executive Order 13532](#) which supports HBCUs. ED issued the initial awards under the program at the end of FY 2013. The four grantee institutions are now using this funding to produce research on retirement security issues and to build capacity and human capital for future research. This research has been submitted to academic journals, such as the Elder Law Journals, and to conferences, such as Society of Business and Industry Conference and the Public Management and Political Pedagogy Annual Conference. In addition, one grantee is testing a culturally-sensitive mobile app to improve that segment of the public's retirement security.



## Supplemental Security Income Program

Investing in this collaborative research initiative is a critical way for SSA to support the FLEC and to help improve financial capability, financial literacy, and retirement security among economically vulnerable groups. We anticipate that this program may also increase the return on our investment in data support for the UAS and HRS. More broadly, the financial literacy and education research we fund via this project line is specifically designed to prevent dependency in old age and to promote understanding and effectiveness of Social Security program features. With the exception of our staff time related to administering the programs, all costs for these activities are charged to our Section 1110 appropriation.

### Enterprise Business Intelligence Platform

This project develops data on an Enterprise Business Intelligence Platform (EBI) for use by SSA components and appropriate entities external to SSA (e.g. Congressional Budget Office (CBO), Congressional Research Service, Open Government, etc.) for research and statistical purposes.

With FY 2015 funding, we began automating current processes, building a web portal where authorized staff can access structured, cleansed, and validated datasets based on SSA administrative data. Enhanced processes and access points will allow for:

- greater efficiency in the production of the Agency's program statistics;
- on-demand access to large quantities of data, as well as customized reports by policy developers, policy makers, and researchers; and
- easier and timelier dissemination of data analysis findings to support data based decisions.

These actions leverage the capabilities of EBI technology to maintain and even increase SSA's ability to provide accurate, timely, and consistent information on our social insurance programs. Furthermore, the proposed automation will allow SSA to reallocate human resources to pursue the development and dissemination of new data, research, and analysis products.

With FY 2016 funding, we plan to continue automation and development of the web portal for OASDI and SSI data. With FY2017 funding, we plan to complete the automation and web portal for earnings related data.

### New and Emerging Research- Retirement

In FY 2017, we plan to continue our partnership with the NIA supporting the "Roybal Center for Decision Making to Improve Health and Financial Independence in Old Age" at the University of Southern California. Congress created the Roybal Centers Program in 1992 to help translate basic social and behavioral research into practical applications for improving the health and well-being of older Americans. We intend to use the Roybal Center project to address emerging research topics of value to the Agency and external stakeholders, such as the White House and Congress. We first contributed funding to this project in FY 2015. The initial set of pilot projects the grantee has proposed to NIA includes research on financial decisions, annuities, and other topics that could inform our outreach and messaging to improve retirement security.

We may also continue to address retirement topics using other research vehicles, such as Intergovernmental Personnel Act (IPA) scholars. Through the IPA program, we fund recognized scholars to work on defined and targeted projects to help create unique and valuable retirement research relevant to SSA's mission. Past accomplishments from the IPA program include research on the impact of the Social Security Statement for both younger and older workers, the earnings implications of divorce for women, and the effects of employment gaps and layoffs on earnings and Social Security benefits.

### Medicare Outreach – Section 1144

Section 1144 of the Social Security Act requires that we conduct outreach to Medicare beneficiaries who may qualify for Medicare cost-sharing assistance under the Medicare Savings Programs (MSP) and for the Medicare prescription drug coverage low-income subsidy. In order to meet this requirement, we have targeted our outreach efforts to include income-tested new Medicare beneficiaries, beneficiaries that have experienced a drop in income, and 20 percent of those who were previously notified of their potential eligibility and still meet the appropriate test.

We use a variety of outreach methods to inform those who potentially qualify for the MSP and/or subsidized Part D. We also send outreach letters to former Disability Insurance beneficiaries without Medicaid who lost their free Medicare Part A due to work. These beneficiaries may be eligible to get help from the MSP to pay their monthly Part A premiums.

In FY 2015, we mailed approximately 3 million outreach letters to those who potentially qualified for MSP or Medicare prescription drug coverage and in FY 2016 we anticipate approximately the same number of mailings.

### **Strengthen the Integrity of Our Programs**

One of the primary aims of our research program is to preserve the public's trust in SSA's programs by simplifying and streamlining how we do our work. To meet the challenges of our growing workload, SSA's research program provides analyses and data that support our efforts to make Social Security more responsive to the needs of the 21<sup>st</sup> century workforce. The following project summaries highlight the external efforts we plan to fund in FY 2017 that will help to simplify and streamline our policies, procedures, and business processes, as well as maximize our use of automation:

#### Census Surveys

The Census Bureau's surveys—primarily the SIPP and the Current Population Survey—are the foundation for much of our policy analysis and modeling efforts. Improving the overall quality of data from Census Bureau surveys enhances the value and reliability of the analyses we conduct. We support efforts to improve the quality of Census Bureau survey data that are of direct relevance to analyses of the Social Security, SSI, and related income-maintenance programs. In addition, we support efforts by the Census Bureau to improve the ability to match Census Bureau survey data to our administrative data on benefits and earnings.

Beginning in FY 2010, a major focus of our funding has been to contribute to the Census Bureau's re-engineering of SIPP, with a new survey that entered the field in February 2014. We rely upon SIPP data matched to our records to study the effects of OASDI, SSI, and related

## Supplemental Security Income Program

programs and to determine how changes to our programs affect individuals, the economy, and program solvency. Some of the important data elements required for our modeling and analysis efforts are not contained in the Census Bureau's re-engineered SIPP. In recent years, we have provided funding and worked with Census to design a supplementary data collection to the re-engineered SIPP to meet our research and evaluation needs. Our FY 2015 funding completed our support of the supplemental data collection effort and data processing. The data are due to be released in December 2016 according to the Census Bureau.

Without this supplemental data collection, our ability to update and use the MINT model to respond to requests from the White House, Congress, and others to evaluate the impact of proposed changes to the Social Security programs will be severely impaired.

### Data Development

One of the main objectives of our extramural research program is to provide information for decision-makers on the Social Security and SSI programs. A key ingredient to providing such information is having appropriate data to answer questions on a range of pending issues. As part of this effort, we develop and maintain a series of detailed statistical databases drawn from SSA's major administrative data systems, prepare a broad range of statistical tables, produce statistical compilations and publications, and develop information for research, evaluation, and models using survey data collected by SSA, other Federal agencies, or federally-sponsored institutions.

This project funds the creation of data that are needed to inform policymakers about important programs, efforts to make data more widely accessible or usable for policy research purposes, and collaboration with other agencies to study issues of policy relevance or to improve data quality and methods of data analysis.

Projects that we are currently funding include:

- Workers' Compensation Statistics—provides support to produce an income series on Workers' Compensation that we publish on an ongoing basis in the Annual Statistical Supplement.
- Committee on National Statistics of the National Research Council—along with contributions from other federal statistical agencies, provides support to the committee to improve statistical methods and information on which public policy decisions are based. Recent Committee topics include survey options for estimating the illegal alien flow at the Southwest border; redesigning the Consumer Expenditure Surveys; improving healthcare cost projections for the Medicare population; formulating a research agenda for the future of social science data collection; the future of federal household surveys collecting pay information from U.S. employers by gender, race and national origin; and measuring financial vulnerability by analyzing spending on medical care spending.
- Joint Program in Survey Methodology—a project jointly sponsored by the Census Bureau and the Interagency Council on Statistical Policy to develop up-to-date research techniques and training programs to train the next generation of researchers on state of the art practices in the statistical and methodological aspects of surveys.

- Research on Survey Methodology Program—a project jointly sponsored by the National Science Foundation and the Interagency Council on Statistical Policy to further the development of new and innovative approaches to surveys that will have broad implications for the field in general and specifically for the federal statistical system. Research topics include survey measurement issues; data collection procedures; technological issues related to survey design; and methods for the analysis of survey data.
- Key Indicators of Well-Being of Older Americans—provides support to the Federal Interagency Forum on Aging-Related Statistics for an interagency collaboration to produce a chart book with 37 key indicators about older Americans in five broad areas: population; economics; health status; health risks and behaviors; and healthcare, and related publications and workshops to identify and fill gaps and improve the quality of data on older Americans.

In addition to these specific projects, we will respond to new needs and opportunities for expansion and improvement of data as they arise.

#### Health and Retirement Study (HRS)

The University of Michigan's HRS surveys more than 22,000 Americans over the age of 50 every 2 years and provides an ongoing source of longitudinal data for research on retirement and aging. The study paints an emerging portrait of an aging nation's transition from work to retirement and provides data on health and economic well-being after retirement. HRS data help us assess a wide range of issues, including pre-retirement saving, health insurance and pension coverage, retirement patterns, and projected benefits of disabled and retired workers. Through jointly financed cooperative agreements with NIA, we have supported the HRS from its inception. HRS has become the premier source of data on the retirement-age population, especially when linked with our administrative records on benefits and earnings.

This project has five major components in FY 2017:

- Basic survey support that is targeted toward protecting against losses in sample size, improving data quality, assuring confidentiality of the data, and developing restricted access to administrative data on benefits and earnings.
- Production of user-friendly public-use HRS longitudinal data files with consistent imputations of missing data and simplified merging of observations across interview waves.
- Collection of longitudinal information from HRS respondents on consumption to understand how consumption changes through retirement and whether people have adequate retirement income to meet their consumption needs.
- Improvements to the consent rate among respondents to match HRS survey information to SSA administrative records on benefits and earnings. This goal is largely achieved through increasing the proportion of HRS interviews in each wave that are conducted in person rather than by telephone. This effort will continue with the new cohort of respondents that will be added to the 2016 HRS.

## Supplemental Security Income Program

- Updates of sample weights that account for attrition across waves of the HRS, longitudinal imputations of wealth and asset measures, and an integrated file to facilitate matching of HRS data to SSA administrative records.

### HRS Supplement

The HRS is an important source of longitudinal data on retirement and aging, but sample sizes of minority and low-income populations are small, limiting research on these groups. Through a jointly financed cooperative agreement with NIA, this project will maintain the increased sample size in the HRS for minority and low-income populations that we started supporting in FY 2009. The minority expansion will continue to have HRS data matched to Agency administrative records.

The HRS minority samples expansion allows researchers to complete subgroup analysis of vulnerable populations, which is particularly important as the HRS has become the premier data source for research on the near-retirement-age and retirement-age populations. The HRS is used heavily for research projects funded by SSA through the RRC and by SSA staff in conducting research on topics including pension participation, differences in contributions to tax-deferred savings accounts among different birth cohorts, and retirement resources of near-retirees. The HRS data we support is also available for outside researchers to use.

Since its inception in 1992, SSA has provided annual funding to support and improve data collection and linkage HRS data to SSA administrative data. Among the things we fund are a user-friendly longitudinal HRS data file, which is heavily used by SSA analysts, academics and contractors; in-person interviews to improve consent rates to match to SSA records; and the collection of longitudinal data on consumption patterns of a subset of HRS respondents. This unique longitudinal dataset makes it possible to study the dynamics of retirement and the aging of the population and how this is changing in successive cohorts. Over 2,000 studies using HRS data are registered on the HRS website. SSA uses the HRS for both policy analysis and model development. HRS data have been used to estimate labor force participation, retirement transitions, financial wealth, and housing equity relationships in SSA's MINT model. The data are also extensively used for RRC-funded research and as the basis for reports by CBO, GAO, the Council on Economic Advisors, and the President's Commission to Strengthen Social Security.

### Retirement Research Consortium (RRC)

The RRC is one of our key tools for maintaining a strong capability to produce a large body of policy-relevant research on retirement and Social Security. The RRC comprises three competitively selected research centers based at the University of Michigan, Boston College, and the National Bureau of Economic Research. They are broadly charged with planning, initiating, and maintaining a high quality, multidisciplinary research program that covers retirement and Social Security program issues. The centers perform valuable research and evaluation of retirement policy, disseminate results, provide training and education awards, and facilitate the use of our administrative data by outside researchers. These centers have greatly expanded the

amount of policy research on Social Security-related issues and have responded to our specific analytical needs.

The research results of the RRC are widely reported in professional journals and conferences and in leading newspapers, radio, and television programs. The centers also disseminate results, train students and practitioners, and facilitate the use of our administrative data by outside researchers. In FY 2017, we will enter year four of the current 5-year cooperative agreements, which run through FY 2018.

Some recent studies funded through the RRC examine how behavioral and psychological factors affect individuals' financial and claiming decisions. These studies are looking at the roles of personality traits and biases, such as the tendency to underestimate exponential growth, which could lead to decisions that may put future retirees' financial security at risk.

Other recent RRC studies have looked at the role of occupations and their characteristics on the work choices of older workers. These studies are looking at how job demands influence retirement plans and whether changes to working conditions, either through job change or workplace accommodations, could lead older workers to delay leaving the workforce.

Finally, additional studies through the RRC assess the relationship between age and cognitive decline as they relate to financial decision making. This research is important to establish the size and the characteristics of the population of future retirees who will require representative payees to manage their Social Security benefits. Recent RRC papers are available at the following link: <http://www.ssa.gov/policy/rrc/>.

### Retirement Income Modeling

Fundamental changes to the Social Security program can have a significant effect on the distribution of benefits, total retirement income, and incidence of poverty. Econometric and simulation models can provide policy makers with detailed information on the effects of changes in government programs on individuals, with projections for years into the future. SSA's MINT model is an important tool for such evaluations. MINT's projections of the aged population have been extended well into the 21<sup>st</sup> century to enable simulation of additional Social Security policy changes. MINT is particularly well suited for studying the distributional effects of reform proposals that are implemented immediately, but also provides valuable insights into proposals that are phased in over time. For example, MINT has been used by SSA, GAO, the Council of Economic Advisors, and OMB. MINT estimates have provided data for numerous congressional policy proposals.

SSA continually assesses the functionality of MINT. MINT is updated frequently to enhance components of the model, add new components, use more recent data, and incorporate the latest assumptions from the Trustees Reports through individual 1 to 2 year contracts. A recently completed contract enhanced MINT to include more recent survey and SSA administrative data and incorporated behavioral responses, model family-level consumption, and improved processing efficiency and turnaround time.

## Supplemental Security Income Program

The MINT project provides quality and productivity improvements that go beyond SSA's staffing resources and expertise. All costs for the development of MINT are charged to our Section 1110 appropriation. However, most MINT analyses are conducted in-house and the costs associated with in-house staff analyses using MINT are funded through our administrative budget.

### *Social Security Programs throughout the World*

The Social Security Programs throughout the World (SSPTW) publication is the product of a cooperative effort between SSA and the International Social Security Association (ISSA). The ISSA is the principal international institution bringing together social security agencies and organizations around the world. The information contained in these volumes is crucial to our efforts and those of researchers in other countries to review different ways of approaching social security challenges that will enable us to adapt our social security systems to the evolving needs of individuals, households and families. These efforts are particularly important as each nation faces major demographic changes, especially the increasing number of aged persons, as well as economic and fiscal issues.

The Office of Research, Evaluation and Statistics has produced the SSPTW since 1937. It is the only source that provides reliable current country specific information on such a large number of foreign social security programs—currently more than 170 countries around the world. Internally, it is used extensively by the Office of International Programs in the preparation of totalization agreements and for determining a country's eligibility under section 202(t) of the Social Security Act; to prepare for international meetings and for internal research activities (e.g. Social Security Bulletin articles, International Update and a monthly newsletter). Externally, it is used by Congress (such as the Senate Special Committee on Aging and the HELP Committee), across other Federal agencies (e.g., the GAO, DOL, and HHS) to prepare reports on a variety of social insurance topics, and by the State Department, which widely distributes copies to its embassies around the world. International Organizations including the World Bank, International Labor Organization, International Monetary Fund and the United Nations, often include SSPTW data in their publications (e.g., the ILO relies on SSPTW for its series World Social Protection Report). In FY 2017, we plan to continue to fund this effort.

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## RELATED FUNDING SOURCES

The Commissioner of Social Security has the authority to conduct research and demonstration projects under section 234 of the Social Security Act. The Commissioner uses trust fund monies to conduct various demonstration projects, including alternative methods of treating work activity of individuals entitled to DI benefits. These demonstration projects, authorized under the 1999 Ticket to Work Act and the Bipartisan Budget Act (BBA) of 2015, P.L. 114-74, are funded from the trust funds, and are not part of the annual research appropriation request. OMB directly apportions section 234 funds. The BBA provides authorization to initiate such projects until December 31, 2021 and to carry out such projects through December 31, 2022. We are currently considering potential demonstration projects that would support the employment efforts of individuals with disabilities, and reduce their dependence on disability benefits. Our Benefit Offset National Demonstration (BOND) requires continued section 234 funding in FY 2017. The BBA also directs SSA to conduct a new demonstration testing a benefit offset

after an allowance for impairment-related work expenses. We are currently developing this demonstration and do not yet have estimates of the FY 2017 costs.

### **EARLY INTERVENTION MENTAL HEALTH DEMONSTRATION (EIMHD)**

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A key challenge for early-interventions is to identify individuals at risk of becoming long-term DI and SSI recipients who would also have the potential to benefit from the intervention methods. This demonstration will test early-intervention methods with a focus on workers with mental illness under the age of 50 who have recently applied for SSI or DI disability benefits and been denied.

Denied applicants often include individuals who are on the margin between employment and receiving disability benefits. Prior research estimates that 40 percent of DI claimants denied at the appeals level end up on the disability rolls within 10 years.<sup>1</sup> With the appropriate health care and employment supports, some of those individuals may remain in the labor market.

The EIMHD will provide participants with an intensive set of behavioral health and related services above and beyond what is available through the individual's existing health plan. Additionally, long-term employment services following the evidence-based Individual Placement and Support (IPS) model will be used to help participants remain in or return to the labor market rather than seek SSA disability benefits.<sup>2</sup> IPS services are delivered by supported employment teams that operate within community mental health agencies and other medical providers, with a key differentiator from other interventions being the linkage between employment and medical services. We will follow an IPS service model similar to that successfully implemented for SSA's MHTS.

The health-related treatment may include behavioral health and related services, medication, and disease management services. The employment-related services could include job placement, and pre- and post-placement support services. We will require service providers to have strong employer contacts and the ability to place participants in sustainable jobs with reasonable wages. Support services may include help with incidentals necessary to secure and maintain employment (such as work clothes or transportation) and low-intensity, long-term services that focus on employment retention once a job is secured (e.g., providing an employment retention coach).

The demonstration will include a 1-year design refinement phase and a 5-year implementation phase. Over that period, it will evaluate impacts on outcomes such as employment, earnings, health, and DI and SSI applications and benefit receipt.

In FY 2015, we released the Request for Proposals for the EIMHD and plan to award a contract in FY 2016. We plan to begin the 1-year design refinement, obtain OMB clearance for surveys, and finalize site selection in FY 2016 and start recruitment in FY 2017.

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<sup>1</sup> See French and Song, "Effect of Disability Receipt on Labor Supply," July 1, 2011, Federal Reserve of Chicago.

<sup>2</sup> The behavioral health and related services would be in addition to base services already available, such as including greater intensity and frequency of services and reimbursement for medication co-pays.



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## APPROPRIATION LANGUAGE

For necessary expenses, including the hire of two passenger motor vehicles, and not to exceed \$20,000 for official reception and representation expenses, not more than

[ \$10,598,945,000 ] *\$11,121,000,000* may be expended, as authorized by section 201(g)(1) of the Social Security Act, *and including the cost of carrying out the Social Security Administration's obligations as required under section 1411 of Public Law 111-148*, from any one or all of the trust funds referred to in such section: *Provided*, That not less than [ \$2,300,000 ] *\$2,500,000* shall be for the Social Security Advisory Board: *Provided further*, That, [ \$116,000,000 may ] *not less than \$59,000,000 shall* be used for the costs associated with conducting continuing disability reviews under titles II and XVI of the Social Security Act and conducting redeterminations of eligibility under title XVI of the Social Security Act: *Provided further*, That, *upon a determination that part of the funds specified in the preceding proviso is not necessary for such reviews and redeterminations, such amounts may be used for other purposes provided herein:*

[ *Provided further*, That the Commissioner may allocate additional funds under this paragraph above the level specified in the previous proviso for such activities but only to reconcile estimated and actual unit costs for conducting such activities and after notifying the Committees on Appropriations of the House of Representatives and the Senate at least 15 days in advance of any such reallocation: *Provided further*, That the acquisition of services to conduct and manage representative payee reviews shall be made using full and open competition procedures:

*Provided further*: That, \$150,000,000 to remain available until expended, shall be for necessary expenses for the renovations and modernization of the Arthur J. Altmeyer Building:] *Provided further*, That unobligated balances of funds provided under this paragraph at the end of fiscal

year [2016] 2017 not needed for fiscal year [2016] 2017 shall remain available until expended to invest in the Social Security Administration information technology and telecommunications hardware and software infrastructure, including related equipment and non-payroll administrative expenses associated solely with this information technology and telecommunications infrastructure: *Provided further*, That the Commissioner of Social Security shall notify the Committees on Appropriations of the House of Representatives and the Senate prior to making unobligated balances available under the authority in the previous proviso: *Provided further*, That reimbursement to the trust funds under this heading for expenditures for official time for employees of the Social Security Administration pursuant to 5 U.S.C. 7131, and for facilities or support services for labor organizations pursuant to policies, regulations, or procedures referred to in section 7135(b) of such title shall be made by the Secretary of the Treasury, with interest, from amounts in the general fund not otherwise appropriated, as soon as possible after such expenditures are made.

In addition, for the costs associated with continuing disability reviews under titles II and XVI of the Social Security Act [and], *including work related continuing disability reviews to determine whether earnings derived from services demonstrate an individual's ability to engage in substantial gainful activity*, for the cost associated with conducting redeterminations of eligibility under title XVI of the Social Security Act, *for the cost of co-operative disability investigation units, and for the cost associated with the prosecution of fraud in the programs and operations of the Social Security Administration by Special Assistant United States Attorneys*, [\$1,426,000,000] \$1,819,000,000 may be expended, as authorized by section 201(g)(1) of the Social Security Act, from any one or all of the trust funds referred to therein: *Provided*, That, of such amount, \$273,000,000 is provided to meet the terms of section 251(b)(2)(B)(ii)(III) of the

Balanced Budget and Emergency Deficit Control Act of 1985, as amended, and  
[\$1,153,000,000] \$1,546,000,000 is additional new budget authority specified for purposes of  
section 251(b)(2)(B) of such Act: *Provided further*, That the Commissioner shall provide to the  
Congress (at the conclusion of the fiscal year) a report on the obligation and expenditure of these  
funds, similar to the reports that were required by section 103(d)(2) of Public Law 104–121 for  
fiscal years 1996 through 2002.

In addition, [\$136,000,000] \$126,000,000 to be derived from administration fees in excess  
of \$5.00 per supplementary payment collected pursuant to section 1616(d) of the Social Security  
Act or section 212(b)(3) of Public Law 93–66, which shall remain available until expended. To  
the extent that the amounts collected pursuant to such sections in fiscal year [2016] 2017 exceed  
[\$136,000,000] \$126,000,000, the amounts shall be available in fiscal year [2017] 2018 only to  
the extent provided in advance in appropriations Acts.

In addition, up to \$1,000,000 to be derived from fees collected pursuant to section 303(c)  
of the Social Security Protection Act, which shall remain available until expended.

*(Departments of Labor, Health and Human Services, and Education, and Related Agencies  
Appropriations Act, 2016.)*

## LANGUAGE ANALYSIS

The Limitation on Administrative Expenses (LAE) appropriation language provides the Social Security Administration (SSA) with the funds needed to administer the Old Age and Survivors Insurance (OASI), Disability Insurance (DI), and Supplemental Security Income (SSI) programs, and to support the Centers for Medicare and Medicaid Services in administering their programs. The LAE account is funded by the OASI, DI, and Medicare trust funds for their share of administrative expenses, by the General Fund of the Treasury for the SSI program's share of administrative expenses, and through applicable user fees. The language provides the limitation on the amounts that may be expended, in total from these separate sources, for the administrative expenses of the agency.

SSA is requesting a total of \$1,819,000,000 in dedicated program integrity funding, including funding for full medical Continuing Disability Reviews (CDR), SSI non-medical redeterminations of eligibility (redeterminations), work related CDRs, cooperative disability investigation (CDI) units, and fraud prosecutions by Special Assistant United States Attorneys (SAUSAs). The FY 2017 program integrity request is comprised of \$273,000,000 in base funding to meet the terms of the Balanced Budget and Emergency Deficit Control Act of 1985, as amended, and \$1,546,000,000 in additional new budget authority. This funding level is consistent with the Bipartisan Budget Act of 2015 (P.L. 114-74).

In addition to the appropriated amounts, SSA is requesting to spend up to \$126,000,000 in SSI State Supplement user fees and up to \$1,000,000 in non-attorney representative fees.

**Table 3.1—Appropriation Language Analysis**

Language Provision	Explanation
<i>“...and including the cost of carrying out the Social Security Administration's obligations as required under section 1411 of Public Law 111–148,...”</i>	The language allows SSA to use LAE resources for some Affordable Care Act activities.
<i>Provided further, That, not less than \$59,000,000 shall be used for the costs associated with conducting continuing disability reviews under titles II and XVI of the Social Security Act and conducting redeterminations of eligibility under title XVI of the Social Security Act: Provided further, That, upon a determination that part of the funds specified in the preceding proviso is not necessary for such reviews and redeterminations, such amounts may be used for other purposes provided herein:</i>	This language carves out funding to support the fully loaded costs of performing 1.1 million CDRs and approximately 2.8 million redeterminations.

Language Provision	Explanation
<p>“<i>Provided further</i>, That unobligated balances of funds provided under this paragraph at the end of fiscal year [2016] 2017 not needed for fiscal year [2016] 2017 shall remain available until expended to invest in the Social Security Administration information technology and telecommunications hardware and software infrastructure, including related equipment and non-payroll administrative expenses associated solely with this information technology and telecommunications infrastructure: <i>Provided further</i>, That the Commissioner of Social Security shall notify the Committees on Appropriations of the House of Representatives and the Senate prior to making unobligated balances available under the authority in the previous proviso...”</p>	<p>The language allows SSA to carryover unobligated balances for non-payroll automation and telecommunications investment costs in future fiscal years.</p>
<p>“In addition, for the costs associated with continuing disability reviews under titles II and XVI of the Social Security Act [and], <i>including work related continuing disability reviews to determine whether earnings derived from services demonstrate an individual’s ability to engage in substantial gainful activity</i>, for the cost associated with conducting redeterminations of eligibility under title XVI of the Social Security Act, <i>for the cost of co-operative disability investigation units, and for the cost associated with the prosecution of fraud in the programs and operations of the Social Security Administration by Special Assistant United States Attorneys</i>, [\$1,426,000,000] \$1,819,000,000 may be expended, as authorized by section 201(g)(1) of the Social Security Act, from any one or all of the trust funds referred to therein: <i>Provided</i>, That, of such amount, \$273,000,000 is provided to meet the terms of section 251(b)(2)(B)(ii)(III) of the Balanced Budget and Emergency Deficit Control Act of 1985, as amended, and [\$1,153,000,000] \$1,546,000,000 is additional new budget authority specified for purposes of section 251(b)(2)(B) of such Act: <i>Provided further</i>, That the Commissioner</p>	<p>The language appropriates \$1,819,000,000 of dedicated program integrity funding for SSA’s full medical CDRs, redeterminations, work related CDRs, CDI units, and fraud prosecutions. That amount comprises a base of \$273,000,000 and additional new budget authority of \$1,546,000,000 for the purposes of an adjustment to the discretionary spending limit as provided in section 251(b)(2)(B) of the Balanced Budget and Emergency Deficit Control Act of 1985.</p>



Language Provision	Explanation
<p>shall provide to the Congress (at the conclusion of the fiscal year) a report on the obligation and expenditure of these funds, similar to the reports that were required by section 103(d)(2) of Public Law 104–121 for fiscal years 1996 through 2002.</p>	
<p>“In addition, [\$136,000,000] <i>\$126,000,000</i> to be derived from administration fees in excess of \$5.00 per supplementary payment collected pursuant to section 1616(d) of the Social Security Act or section 212(b)(3) of Public Law 93–66, which shall remain available until expended. To the extent that the amounts collected pursuant to such sections in fiscal year [2016] <i>2017</i> exceed [\$136,000,000] <i>\$126,000,000</i>, the amounts shall be available in fiscal year [2017] <i>2018</i> only to the extent provided in advance in appropriations Acts.”</p>	<p>The language makes available up to \$126,000,000 collected from states for administration of their supplementary payments to the SSI program. This assumes the fee will increase from \$11.56 per check in FY 2016 to \$11.69 in FY 2017 according to increases established by statute. SSA receives the amount collected above \$5.00 from each fee.</p>
<p>“In addition, up to \$1,000,000 to be derived from fees collected pursuant to section 303(c) of the Social Security Protection Act, which shall remain available until expended.”</p>	<p>The language provides for the use of up to \$1,000,000 derived from fees charged to non-attorneys who apply for certification to represent claimants.</p>

## SIGNIFICANT ITEMS IN APPROPRIATIONS COMMITTEE REPORTS

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The table below includes the significant items in the FY 2016 Joint Committee Report, H.R. 2029, as well as items set forth in House Report 114-195 and Senate Report 114-74.

**Table 3.2— Consolidated Appropriations Act, 2016: Joint Committee Report (H.R. 2029)—  
Significant Items**

<b>Disability Early Intervention Initiative/Functional Assessment of Battery</b>	<b>Actions Taken or To Be Taken</b>
<p>The Disability Early Intervention Initiative will test innovative and evidence-based approaches to improve outcomes for individuals with disabilities who are not yet receiving Social Security disability benefits, but who are likely to be eligible for benefits in the future. The intent of this initiative is to provide a multi-pronged approach, focusing on helping them remain in the workforce. The Social Security Administration (SSA) has partnered with the National Institutes of Health to create a functional assessment tool that is reliable and objective and may inform the disability determination process. One of the major projects of this partnership is the: Functional Assessment Battery. The agreement directs the Social Security Administration (SSA) to provide a report to the Committees on Appropriations of the House of Representatives and the Senate, Committee on Finance of the Senate, and Committee on Ways and Means of the House of Representatives on how the SSA might use the National Institutes of Health's Functional Assessment Battery (FAB) as part of the disability determination process; how it would ensure the validity and accuracy of the FAB before using it for this purpose; and how it would obtain public comment and ensure transparency if the FAB is incorporated into the determination process.</p>	<p>SSA is working to satisfy the requirement.</p>

<b>Disability Early Intervention Initiative/Functional Assessment of Battery</b>	<b>Actions Taken or To Be Taken</b>
<b>Work Incentives Planning and Assistance (WIPA) and Protection and Advocacy for Beneficiaries of Social Security (PABSS)</b>	<b>Actions Taken or To Be Taken</b>
The bill includes not less than \$23,000,000 for the WIPA program and \$7,000,000 for the PABSS program.	We issued PABSS awards notices in October 2015. We plan to issue WIPA award notices in June 2016.
<b>Fraud Risk Performance</b>	<b>Actions Taken or To Be Taken</b>
The Committee strongly encourages SSA to fully implement the recommendations found within the SSA Inspector General report on Fraud Risk Performance Audit. Specifically, the Committee urges SSA to take a risk-based approach to combatting fraud, be more proactive in addressing and mitigating new fraud schemes, and improve the design operating effectiveness of anti-fraud measures. Additionally, the Committee directs SSA to provide a breakout within 60 days of enactment of the funding spent in fiscal year 2015 and the anticipated amount to be spent in fiscal year 2016 on anti-fraud activities. This breakout should include activities that SSA is working on in concert with the SSA Office of Inspector General.	SSA is reviewing the requirement. The agency is including some of this information as part of the 2015 Bipartisan Budget Act Section 845a Report. The report is included in our FY 2017 Congressional Justification – please see last tab.
<b>Report on Medical Listings</b>	<b>Actions Taken or To Be Taken</b>
SSA employs medical listings to make disability determinations, many of which have not been updated for decades. The Committee directs SSA to provide a report within 60 days of enactment to the House Appropriations Subcommittee on Labor, Health and Human Services and Education and the House Ways and Means Subcommittee on Social Security regarding the number of years since the last update and when the agency expects to conduct all of the updates.	SSA is working to satisfy the requirement.
<b>Medical Vocational Guidelines</b>	<b>Actions Taken or To Be Taken</b>
The Committee is encouraged that SSA plans to issue an Advanced Notice of Proposed Rulemaking on the need to update the medical-vocational guidelines, including seeking input	SSA is working to provide a report on its plan for updating the medical vocational guidelines.

**Disability Early Intervention****Initiative/Functional Assessment of Battery****Actions Taken or To Be Taken**

from the Disability Research Consortium; the Institute of Medicine; and other medical, aging, employment, and disability experts. These guidelines play a key role in SSA's disability determination process but have not been updated since they were established in 1978. The Committee directs SSA to provide a report to the Committees on Appropriations of the House of Representatives and the Senate, no later than 60 days after the enactment of this act, on its plan for updating the medical vocational guidelines.

**Report on LAE Expenditures****Actions Taken or To Be Taken**

The Committee directs SSA to provide a report to the House Appropriations Subcommittee on Labor, Health and Human Services, and Education and the House Ways and Means Subcommittee on Social Security within 60 days of enactment detailing how much funding was expended on the following categories in fiscal year 2015:

- Personnel costs by General Schedule grade, Administrative Law Judge personnel costs, Senior Executive Service personnel costs, reemployed annuitant personnel costs, and personnel costs by region
- Information technology costs broken out by hardware/software technology and upgrade/maintenance costs
- Physical infrastructure costs by region and office function
- Overall costs for personnel, time and dollars for the following:
  - OASI, DI and SSI
  - Other SSA missions, including return to work efforts
  - Program Integrity work broken out by OASI, DI and SSI as well as types of spending (data matching, predictive data work and data analytics)
  - Disability Determination Services State costs and federal staff costs

For Personnel costs by General Schedule grade, Administrative Law Judge personnel costs, Senior Executive Service personnel costs, and reemployed annuitant personnel costs, please see Table 3.28 on page 163. For personnel costs by region, please see Table 3.30 on page 165. For Information Technology costs broken out by hardware/software technology and upgrade/maintenance costs, please see Table 3.22 on page 158. For Physical infrastructure costs by region and office function, please see Table 3.13 on page 137 and Table 3.14 on page 138. For Overall costs for personnel, time and dollars for OASI, DI, SSI, and other SSA missions, please see Table 3.7 on page 129. For Program Integrity work broken out by OASI, DI and SSI as well as types of spending, please see Table 3.9 on page 131. For Disability Determination Services State costs and federal staff costs, please see Table 3.12 on page 136.

<b>Disability Early Intervention Initiative/Functional Assessment of Battery</b>	<b>Actions Taken or To Be Taken</b>
<b>Huntington's Disease</b>	<b>Actions Taken or To Be Taken</b>
<p>The Committee urges the Social Security Administration to work with the National Institutes of Health to immediately revise the Huntington's disease (HD) SSDI guidelines, used to determine disability for individuals with the disease, to reflect the most up-to-date medical understandings of the physical, cognitive, and behavioral symptoms. The Committee understands that some believe the current guidelines do not fully recognize the emotional and psychological symptoms of Huntington's disease. Some research sources indicate that the emotional and psychological symptoms appear years before physical symptoms are exhibited. The Committee urges SSA to work with NIH to ensure the SSDI HD guidelines reflect the most current scientific data.</p>	<p>The agency is working to implement the recommendations to revise the HD guidelines used to determine disability for individuals with the disease.</p>
<b>Muscular Dystrophy</b>	<b>Actions Taken or To Be Taken</b>
<p>The Committee is aware that SSA was added to the Muscular Dystrophy Coordinating Committee through the Muscular Dystrophy CARE Act Amendments enacted in September 2014. The Committee requests that the agency provide relevant data within the fiscal year 2017 budget request on the rate at which persons with Duchenne and Becker Muscular Dystrophy utilize SSA programs, particularly those focused on promoting employment and community independence such as the Ticket to Work Program.</p>	<p>Please see page 68 within the SSI section of the CJ for this information.</p>
<b>Continuing Disability Reviews and SSI Redeterminations of Eligibility</b>	<b>Actions Taken or To Be Taken</b>
<p>The agreement includes a total of \$1,542,000,000 for SSA to conduct Continuing Disability Reviews (CDRs) under the Disability Insurance and Supplemental Security Income (SSI) programs, and redeterminations of eligibility under the SSI program. This includes \$1,426,000,000 specified for the base and cap adjustment amounts included in the Budget</p>	<p>SSA will complete program integrity work in FY 2016 in line with this limitation. We plan to complete 850,000 CDRs and 2.522 million redeterminations. As the year progresses, we will continue to analyze our cost assumptions for program integrity work in FY 2016 based on current experience and will report to Congress as appropriate.</p>

<b>Disability Early Intervention Initiative/Functional Assessment of Battery</b>	<b>Actions Taken or To Be Taken</b>
Control Act of 2011, and \$116,000,000 in additional funding provided under SSA's Limitation on Administrative Expenses (LAE) account. The Commissioner may allocate more or less than \$116,000,000 from SSA's regular LAE account for CDRs and redeterminations but only for reconciling estimated and actual unit costs for conducting such activities, and after notifying the Committees on Appropriations of the House of Representatives and the Senate at least 15 days prior to any such reallocation. If less funding is allocated for such activities, the funding will be available for regular activities within the LAE account.	Please see Table 3.8 on page 131 within this section of the CJ for accompanying data on the total costs associated with CDRs and redeterminations for FY 2015 - FY 2017.
<b>Representative Payee Reviews</b>	<b>Actions Taken or To Be Taken</b>
The agreement includes funding for SSA to continue efforts to improve oversight of the representative payee process. In the acquisition of services to conduct and manage representative payee reviews, an eligible entity shall include, but not be limited to, any national organization with significant and demonstrable experience monitoring representative payees, identifying and preventing fraud and abuse, and addressing problems found among individuals with different types of disabilities and among different types of service providers.	SSA's acquisition of services to conduct and manage representative payee reviews will be made using full and open competition procedures.
<b>Medical Improvement Review Standard</b>	<b>Action Taken or To Be Taken</b>
The Committee commends SSA for its work to improve program integrity. However, the Committee is concerned about GAO's testimony to Congress that confusion still exists about the Medical Improvement Review Standard [MIRS] and its exceptions. The Committee directs SSA to submit a report no later than 60 days after the enactment of this act to the Committees on Appropriations of the House of Representatives and the Senate, on its progress in educating Disability Determinations Services in the proper application of the MIRS and its exceptions.	SSA is working to satisfy the reporting requirements.

<b>Disability Hearing Pilot Program</b>	<b>Actions Taken or To Be Taken</b>
The Committee notes that SSA has made positive statements to Congress about its pilot program in Region I that requires administrative law judges to give claimants a 75 day notice before their hearing and requires claimants to submit all evidence 5 days before the hearing subject to good cause exception (also known as "soft" closing of the record). This policy promotes a smoother hearing process, reducing the time it take to hear and adjudicate disability appeals, while still providing assurances that individuals are able to provide all evidence in support of their case. The Committee directs SSA to provide to the Committees on Appropriations of the House of Representatives and the Senate, no later than 60 days after the enactment of this act, an update on this pilot program and any plans to expand the pilot to other regions.	SSA is working to satisfy the reporting requirements.

<b>Vocational Expert (VE) Fees</b>	<b>Actions Taken or To Be Taken</b>
The Committee notes that SSA's OIG has recommended that SSA periodically determine whether VE fees are appropriate to obtain the required level of VE service, which could include benchmark studies with VE fees paid in the national economy or elsewhere by government entities. The Committee strongly encourages SSA to conduct such a review, including comparing fees paid by SSA to those paid by other governmental and non-governmental organizations. The Committee directs SSA to brief the Committees on Appropriations of the House of Representatives and the Senate on its plan to comply with these OIG recommendations.	The agency plans to brief the Appropriations Committees on its plan to comply with OIG recommendations regarding VE fees in March 2016.

<b>Advertising Fees</b>	<b>Actions Taken or To Be Taken</b>
The agreement includes a provision requiring agencies to disclose on advertising materials that such communication is produced at U.S. taxpayer expense.	Please see Table 3.12 on page 136 for this information.

## GENERAL STATEMENT

### LIMITATION ON ADMINISTRATIVE EXPENSES OVERVIEW

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The LAE account funds the operating expenses of the Social Security Administration and its programs: the OASI and DI programs, the SSI program, certain health insurance and Medicare prescription drug functions, and the Special Benefits for Certain World War II Veterans program. With these funds, SSA provides service to millions of Americans in our field offices, via telephone, or through the Internet at [the Social Security Website](#). The LAE account provides the funds SSA needs to perform its core responsibilities, including completing claims and applications for benefits, conducting hearings to review disputed decisions, ensuring benefits continue to be distributed properly, and maintaining the integrity of the trust funds.

SSA currently employs about 65,000 dedicated public service employees through a national network of 1,500 offices. Combined with over 16,000 state employees in the Disability Determination Services (DDS), they demonstrate their commitment to the American public daily by providing the best service possible. SSA's employees take pride in administering agency programs, realizing that the work they do affects the lives of many Americans.

### FY 2017 PRESIDENT'S BUDGET

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#### SSA's Programs

For FY 2017, SSA is requesting LAE budget resources of \$13.067 billion. We will continue to handle high volumes of work and focus on providing quality services, while significantly increasing program integrity efforts. Our budget also ensures that we can invest in technology to be as efficient as possible and effectively serve the public.

As the Baby Boomers continue to retire, it is essential that we have the resources to complete their applications, as well as to handle the ongoing work once they begin receiving benefits. We expect to complete over 5.7 million applications for retirement benefits in FY 2017. We will administer about \$813 billion in OASI benefit payments to a monthly average of approximately 52 million beneficiaries including 89 percent of the population aged 65 and over.

We continue to process stable, but high volumes of initial disability claims. Enactment of the FY 2017 President's Budget will enable us to continue to reduce backlogs in program integrity reviews and stabilize initial disability claims pending. This budget will fund the staff at the 54 State Disability Determination Services (DDS) who will complete over 2.8 million initial disability claims in FY 2017. This budget, combined with our improvements to the hearings process, will enable us to complete 784,000 hearings, with an annual average processing time of 555 days in FY 2017. See Table 3.34 in the back of this section for more details on the disability appeal workload. In FY 2017, SSA will pay about \$149 billion in Disability Insurance benefits



to a monthly average of approximately 11 million disabled workers and their family members per month.

The SSI program is a Federal assistance program administered by SSA that guarantees a minimum level of income for aged, blind, or people with disabilities. It is a safety net for individuals with little or no Social Security or other income and limited resources. We estimate we will pay about \$56 billion in Federal benefits to approximately 8.2 million SSI recipients in FY 2017. Including State supplementary payments, SSA expects to pay a total of about \$59 billion and administer payments to over 8.4 million recipients.

SSA assists the Centers for Medicare and Medicaid Services (CMS) in administering the Medicare Hospital Insurance (HI), Supplementary Medical Insurance (SMI), and the Prescription Drug programs. The Affordable Care Act (ACA) (P.L. 111-148) also created additional responsibilities for SSA, such as administering the income related monthly adjustment amount (IRMAA) reduction in Part D Subsidy for high-income beneficiaries.

In FY 2009, Congress appropriated funding through the Medicare Improvements Patients and Providers Act (MIPPA) to SSA for activities related to the implementation of changes to the Low-Income Subsidy (LIS) Prescription Drug program. This funding is available until expended, and we estimate we will spend \$6 million for LIS work in FY 2017.

In FY 2015, Congress passed the Medicare Access and CHIP Reauthorization Act of 2015 (MACRA). This bill prohibits displaying, coding, or embedding Social Security numbers on a beneficiary's Medicare card. In order to fund implementation costs to comply with this provision, SSA will receive \$98 million funded incrementally from FY 2015 to FY 2018.

SSA also collaborates with the Department of Homeland Security in administering the E-Verify program through verifying the employment eligibility of newly-hired employees by electronically checking employee names, Social Security numbers, dates of birth, U.S. citizenship status, and resolving SSA-related discrepancies with the employee when we are unable to electronically verify that information.

### **Program Integrity**

SSA receives special dedicated funding for two types of program integrity work: CDRs, which are periodic reevaluations to determine if beneficiaries continue to meet SSA's standards of disability or have returned to work and no longer qualify for benefits, and SSI redeterminations, which are periodic reviews of non-medical factors of eligibility, such as income and resources.

The Budget Control Act of 2011 (BCA) allows increases to the Federal Government's annual spending caps through FY 2021 for program integrity purposes. If Congress appropriates funds for our program integrity work, the discretionary spending limit may increase by a corresponding amount up to a specified level. The Bipartisan Budget Act of 2015 (BBA) increased the cap adjustments proposed in the BCA by a net \$484 million between FY 2017 – FY 2021. The BBA also expanded the uses of the cap adjustment funds to include cooperative disability units and fraud prosecutions. It also clearly defines the use of funds for work related CDRs. In FY 2017, the BBA allows a maximum cap adjustment of \$1,546 million for program integrity funding

above a \$273 million base. With a \$1,819 million total appropriation for program integrity, we would conduct 1,100,000 full medical CDRs and 2,822,000 SSI redeterminations in FY 2017. At these volumes, we would complete over 250,000 more medical CDRs compared to FY 2016. In FY 2016, we plan to complete 850,000 CDRs and 2,522,000 redeterminations. See Table 3.8 for information on the consolidated accounting of the total funding required for CDRs and redeterminations for FY 2015 through FY 2017.

Our CDRs and SSI redeterminations ensure that beneficiaries continue to meet the eligibility requirements to receive payments. These reviews save billions of program dollars with only a comparatively small investment of administrative funds. Our current estimates indicate that medical CDRs conducted in FY 2017 will yield a return on investment (ROI) of about \$8 on average in net Federal program savings over 10 years per \$1 budgeted for dedicated program integrity funding, including Old-Age, Survivors, and Disability Insurance (OASDI), SSI, Medicare and Medicaid program effects. Similarly, our estimates indicate that non-medical redeterminations conducted in 2017 will yield a ROI of about \$3 on average of net Federal program savings over 10 years per \$1 budgeted for dedicated program integrity funding, including SSI and Medicaid program effects.<sup>1</sup>

The Budget assumes the full cost of performing CDRs in 2017 and beyond, to ensure that sufficient resources are available to account for spending on these activities.

The increased cap funding authorized through 2021 in the BBA, if fully provided in the appropriations process, is estimated to eliminate our backlog of CDRs by the end of 2019. The Budget assumes additional legislation will be passed that continues the cap adjustment through 2026 in order to avoid developing a backlog of reviews during the budget window. Please refer to the Budget Process chapter in the Analytical Perspectives volume for a more details.

## Anti-Fraud

SSA engages in a variety of activities to prevent, detect, and prosecute fraudulent activity. We established an Office of Anti-Fraud Programs (OAFP) in FY 2015. This office provides

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<sup>1</sup> ROI calculations for the President's budget use estimates and projections that precede the start of the actual budget year by at least eight months. These assumptions are subsequently refined based on the actual appropriation and actual costs incurred through the year for the CDR and non-medical redetermination workloads. For CDRs, the numerator represents the estimated program savings resulting from completion of all planned medical CDRs. The estimated savings do not include any assumption of program savings resulting from work CDRs. The denominator includes that portion of the dedicated PI administrative funding projected for CDRs, including any PI funds that may be needed for work CDRs. (For FY 2017, the CDR ROI is:  $\$8,618\text{M}/\$1,068\text{M}=8.07$ ) For SSI non-medical redeterminations, the numerator represents the estimated program savings resulting from completion of all planned reviews. The denominator includes that portion of the dedicated PI administrative funding projected for SSI non-medical redeterminations. (For FY 2017, the SSI non-medical redetermination ROI is:  $\$2,280\text{M}/\$726\text{M}=3.14$ ) For reports to Congress after the close of a fiscal year, the ROIs are based on the actual work accomplished. For the numerator, program savings for the ten-year budget window still rely on actuarial models that project future savings and may include cases worked that still have appeals pending. For the denominator, we look to our Cost Analysis System for details on the total administrative dollars expended. For SSI non-medical redeterminations, the denominator is all administrative costs incurred for the work completed. For medical CDRs, the denominator includes administrative expenses for all medical reviews conducted, both full medical reviews as well as our CDR mailers. This also includes the costs for hearings and appeals of medical CDR decisions in the subject year.

centralized oversight of and accountability for our efforts to prevent, deter, and detect fraud. OAFP increases our efficiency and enhances our ability to combat fraud by sharing knowledge, using data analytics and industry-standard business processes, and centralizing our deployment of training and communications. Our National Anti-Fraud Committee works with all of the Regional Anti-Fraud Committees to enhance existing fraud prevention efforts and implement new mitigation strategies, while also providing guidance and support to OAFP.

Our efforts include continuing to bolster our Cooperative Disability Investigation (CDI) program. CDI units are highly successful at detecting fraud before we make a disability decision. The CDI program links our Office of the Inspector General and local law enforcement with Federal and State workers who handle disability cases. In FY 2015, the program consisted of 36 units covering 31 states and the Commonwealth of Puerto Rico. We will continue to expand this program in FY 2016 and FY 2017. The BBA requires SSA to expand the CDI program to cover all States and Territories no later than October 1, 2022. This requirement will be subject to the availability of funding and participation of local law enforcement agencies.

Another anti-fraud activity includes Access to Financial Institutions (AFI), which is a program that identifies excess resources in financial accounts - a leading cause of SSI payment errors. AFI verifies bank account balances with financial institutions for purposes of determining SSI eligibility. In addition to verifying alleged accounts, AFI detects undisclosed accounts by using a geographic search to generate requests to other financial institutions. We currently use the AFI system in all 50 States, the District of Columbia, and the Commonwealth of the Northern Mariana Islands for essentially all SSI non-medical redeterminations and full applications where there is an allegation of financial resources above the current AFI resource tolerance level. The BBA expands the use of AFI and grants us the ability to verify financial information for all overpaid individuals (Title 2 or Title 16). The BBA requires the Commissioner to obtain an individual's authorization to obtain financial institution records before determining whether recovery of such individual's overpayment may be waived under the "defeats the purpose" provision.

In addition to these efforts, we will continue to support our centralized fraud prevention units, which are comprised of disability examiners dedicated to reviewing and analyzing fraud cases. We are also strengthening and modernizing our representative payee program to ensure we appoint suitable representative payees for our beneficiaries and that representatives managing funds use these funds appropriately. We will continue to explore data analytics to detect and prevent fraud by determining common characteristics and patterns of anomalous activity, and we will improve death data processing by working to centralize and capture all death information in one system to prevent erroneous payments.

### **Information Technology (IT) Modernization**

IT plays a critical role in our day-to-day operations. Most of our IT funding is used for ongoing operational costs such as our National 800 Number service and our online services, both of which help us keep pace with the recent increases in claims. In FY 2015, our IT infrastructure supported the payment of more than \$930 billion in benefits to nearly 67 million people and the

maintenance of hundreds of millions of Social Security numbers and related earnings records for nearly every American.

However, the database systems our agency uses today are 40 years old and are no longer the best solution to administer our programs. For several years, we worked to modernize our IT in small pieces at a time, but we have exhausted nearly all of these small efforts. We are now at a point where we must undertake a larger, multiyear effort. Our FY 2017 Budget requests multiyear funding of \$300 million, spread over four years, to undertake an IT modernization project that will bring our systems into the modern world.

### **Disability Case Processing System**

By enhancing the technological infrastructure that supports disability case processing nationwide, SSA aims to improve both efficiency and effectiveness by rendering timely and accurate disability decisions. The Disability Case Processing System (DCPS) will replace 54 independently operated, outdated systems across the DDSs, which are the state agencies that make disability determinations for SSA.

The new system will allow for faster and more accurate case processing, reduce administrative costs, and provide structured data that will support our fraud analytics efforts. Implementation will look different in the various sites and does not mean that 100 percent of their staffs will be using DCPS. Our tentative phased implementation schedule includes two early adopters of DCPS in FY 2016. In FY 2017, 12 to 18 of the remaining DDSs will implement DCPS, and in FY 2018 approximately 40 to 46 of the remaining DDSs will implement DCPS. We have not finalized our implementation plan, which is an agile based approach.

## FUNDING REQUEST

Our FY 2017 LAE budget request of \$13.067 billion will allow us to balance our important service and stewardship work, and address the critical agency priorities outlined in Vision 2025. The table below provides dollars and workyears funded by this budget:

**Table 3.3—Budgetary Request**

	FY 2015 Actual	FY 2016 Enacted	FY 2017 Estimate
<b>Budget Authority</b> (in millions)			
<b>Limitation on Administrative Expenses (LAE)</b>	\$11,806	\$12,162	\$13,067
<b>Research and Demonstrations</b>	\$83	\$101	\$58
<b>Office of the Inspector General (OIG)</b>	\$103	\$106	\$112
<b>Total Budget Authority<sup>1</sup></b>	<b>\$11,992</b>	<b>\$12,368</b>	<b>\$13,237</b>
<b>Workyears</b>			
Full-Time Equivalents <sup>2</sup>	63,394	64,860	66,140
Overtime	2,831	674	2,200
Lump Sum	246	298	298
<b>Total SSA Workyears</b>	<b>66,471</b>	<b>65,832</b>	<b>68,638</b>
<b>Total Disability Determination Services (DDS) Workyears</b>	<b>14,925</b>	<b>15,270</b>	<b>16,000</b>
<b>Total SSA/DDS Workyears</b>	<b>81,396</b>	<b>81,102</b>	<b>84,638</b>
OIG Workyears	533	543	564
<b>Total SSA/DDS/OIG Workyears</b>	<b>81,929</b>	<b>81,645</b>	<b>85,202</b>

When states choose to take over administration of their own SSI state supplementation payments, SSA loses some user fee revenue. Over the last 5 years, three states have either fully or partially opted out of SSA's administration of their supplementation payments. Rhode Island partially opted out in January 2011, leaving us with the more difficult categories to administer. Massachusetts and Utah fully opted out in April 2012 and January 2014, respectively. Most recently, New York began administering its own state supplementation program beginning on October 1, 2014. The user fee estimates for FY 2016 and FY 2017 reflect this change. New York represented about 30 percent of the federally-administered SSI state supplementation benefits paid by SSA. The offsetting collections from other LAE funding sources are adjusted to accommodate the user fee revenue changes within our total LAE request.

<sup>1</sup> Totals may not add due to rounding.

<sup>2</sup> FY 2016 and FY 2017 FTE totals do not include FTEs for MACRA implementation.

## PERFORMANCE TARGETS

The President's FY 2017 request will allow SSA to achieve the following key performance targets:

**Table 3.4—Key Performance Targets**

FY 2017 Performance Table	FY 2015 Actual	FY 2016 Enacted <sup>1</sup>	FY 2017 Request
<b>Selected Workload Measures</b>			
Retirement and Survivors Claims Completed (thousands)	5,327	5,586	5,732
Initial Disability Claims Completed (thousands)	2,759	2,695	2,810
Disability Reconsiderations Completed (thousands)	723	702	715
Hearings Completed (thousands)	663	703	784
National 800 Number Calls Handled (millions)	37	34	38
Average Speed of Answer (ASA) (seconds)	617	945	675
Agent Busy Rate (percent)	7.5%	9.5%	7.0%
Social Security Numbers (SSN) Completed (millions)	16	16	16
Annual Earnings Items Completed (millions)	266	264	265
Social Security Statements Issued (millions) <sup>2,3</sup>	50	38	44
<b>Selected Outcome Measures</b>			
Initial Disability Claims Receipts (thousands)	2,756	2,807	2,817
Hearings Receipts (thousands)	746	730	729
Initial Disability Claims Pending (thousands)	621	733	740
Disability Reconsiderations Pending (thousands)	144	136	137
Hearings Pending (thousands)	1,061	1,087	1,033
Average Processing Time for Initial Disability Claims (days)	114	113	113
Average Processing Time for Disability Reconsiderations (days) <sup>4</sup>	113	N/A	109
Annual Average Processing Time for Hearings Decisions (days)	480	540	555
Disability Determination Services Production per Workyear	307	307	314
Office of Disability Adjudication and Review Production per Workyear	95	94	98
Other Work/Service in Support of the Public - Annual Growth of Backlog (workyears)	N/A	(2,000)	(2,700)
<b>Selected Program Integrity Performance Measures</b>			
Periodic Continuing Disability Reviews (CDR) Completed (thousands)	1,972	1,950	2,200
Full Medical CDRs (included above, thousands)	799	850	1,100
Supplemental Security Income (SSI) Non-Medical Redeterminations Completed (thousands)	2,267	2,522	2,822

<sup>1</sup> FY 2016 is a 53-week year for management information purposes. After the close of the year, we will report both 52 and 53-week actual performance data. Our budgeted performance goals are full-year goals based on the workyears we are able to support with funds available in FY 2016.

<sup>2</sup> The Social Security Statements (SSS) Issued measure includes paper statements only; it does not include electronic statements issued.

<sup>3</sup> The original estimate for Social Security Statements Issued measure in FY 2016 President's Budget was 45 million. This has been reduced by ~6.6 million, as a result of the agency sending out the scheduled SSS for FY 2016 October in FY 2015 September. Therefore, the FY 2016 Enacted number has been adjusted to ~38 million.

<sup>4</sup> We developed management information for Average Processing Time for Disability Reconsiderations in FY 2013. FY 2014 was the first full fiscal year for which data was available for this measure. Now that we have had the opportunity to analyze at least two years of actual data, this year we developed a performance target for FY 2017.

SSA's budget is fully integrated with its Annual Performance Plan (APP), which is included as the second to last tab in this *Justification of Estimates for Appropriations Committees*, and online at [our website](#). The budget estimates are linked to key performance above and support all of the more detailed measures outlined in the APP.

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## RECENT ACCOMPLISHMENTS

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We continue to be an efficient organization; in FY 2016, our administrative costs are about 1.3 percent of the benefit payments we pay each year. We are proud to have maintained our efficiency. In FY 2015, we:

- Paid over \$930 billion to more than 67 million beneficiaries;
- Handled approximately 37 million calls on our National 800 Number;
- Served about 40 million visitors in our 1,200 field offices nationwide;
- Completed over 8 million claims for benefits and more than 660,000 hearing dispositions;
- Handled over 35 million changes to beneficiary records;
- Issued over 16 million new and replacement Social Security cards;
- Performed almost 2 billion automated Social Security number verifications;
- Posted about 266 million wage reports;
- Handled over 18,000 cases in Federal District Courts;
- Completed over 2.2 million SSI non-medical redeterminations;
- Completed 799,000 full medical CDRs; and
- Completed approximately 3 million overpayment actions.

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## PRIORITY GOALS

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We serve the American people in a wide variety of ways. In support of the Administration's performance improvement efforts, we have embraced the power of goal setting as a way to improve our performance and accountability to the American people.

As required by the GPRA Modernization Act of 2010, we established the following ambitious and outcome-focused Agency Priority Goals (APG), linked directly to our overarching strategic goals and objectives set forth in our Fiscal Year 2014-2018 Agency Strategic Plan.

- **Improve customer service and convenience by increasing online services.**
  - In 2016, we will increase the number of transactions by 25 million over 2015. This increase will result in 112.1 million transactions.
- **Increase customer satisfaction with our services.**
  - In 2016, our combined customer satisfaction score for our internet services will remain above the excellent threshold (over 80 points) on average, with an average score of at least 84.5.
  - In 2016, our combined customer satisfaction rating (as Excellent, Very Good, or Good) for our office and telephone services will average at least 80.

- **Reduce the disability hearings pending.**
  - In FY 2016, we will decide 99% of cases that begin the fiscal year at 430 days old or older (our 252,000 oldest cases).
- **Reduce the percentage of improper payments made under the SSI program.**
  - In FY 2016, ensure that 95 percent of our payments are free of overpayment.

We have specific measures and milestones to monitor our progress. Additionally, through our quarterly internal review process, our executives have candid discussions regarding progress, any challenges we must overcome, and strategies that will support goal achievement. APGs are two-year goals to advance progress toward achieving longer-term strategic goals and objectives.

## NATIONAL SUPPORT CENTER

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In FY 2009, Congress provided \$500 million for the construction and partial equipping of a new National Support Center (NSC) as part of the American Recovery and Reinvestment Act (Recovery Act). We are currently transitioning our nationwide computer operations from the National Computer Center (NCC) to the NSC. Our systems maintain demographic, wage, and benefit information on almost every American. The data housed at the NCC are critical national economic and information resources and essential to providing service to the millions of individuals who count on us each day. While once a state-of-the-art data center designed for mainframe use, the NCC is over 30 years old and the facility infrastructure systems have exceeded their useful life. With these Recovery Act funds, we took timely action to ensure a new facility was built and operational as the NCC nears the end of its functional life.

### **Projected Milestone Schedule**

On December 28, 2012, we received a Presidential waiver allowing us to retain and continue to obligate funds appropriated for expenses for the replacement of our NCC. As of September 30, 2015, we have obligated \$447 million and we expect to spend the remaining ARRA funds by the end of FY 2016. The General Services Administration and the Social Security Administration provided the following schedule of key milestones.

<b><u>Planned</u></b>	<b><u>Actual</u></b>	<b><u>Milestone</u></b>
Aug 2010	Aug 2010	Program of Requirements
Feb 2011	Feb 2011	Recommend Site
Sep 2011	Aug 2011	Acquire Site
Mar 2012	Jan 2012	Award Design-Build Construction
July 2014	July 2014	Complete Construction
Oct 2014	Sept 2014	Final Commissioning/Contingency
Mar 2015	Oct 2014	Begin Transition of IT Services
Aug 2016	TBD	

We began moving the IT services from the NCC to the NSC beginning in October 2014, and we will complete the transfer in August 2016. Preparatory efforts are under way to virtualize and consolidate significant portions of our IT equipment, perform application and asset inventory planning, and formulate a concise migration plan so that we can meet this goal.



**Actual and Planned Obligations for the New NSC**

The following table provides actual and planned obligations for the NSC as of January 7, 2016.

**Table 3.5—Actual and Planned Obligations for the New NSC****(Dollars in thousands)**

<b>FY 2009</b>	<b>FY 2010</b>	<b>FY 2011</b>	<b>FY 2012</b>	<b>FY 2013</b>	<b>FY 2014</b>	<b>FY 2015</b>	<b>FY 2016</b>
<b><u>Actual</u></b>	<b><u>Actual</u></b>	<b><u>Actual</u></b>	<b><u>Actual</u></b>	<b><u>Actual</u></b>	<b><u>Actual</u></b>	<b><u>Actual</u></b>	<b><u>Planned</u></b>
\$1,330.4	\$1,850.8	\$387,699.5	(\$30,856.2) <sup>1</sup>	\$39,191.0	\$59,797.7 <sup>2</sup>	(\$12,451) <sup>3</sup>	\$53,437.8

<sup>1</sup> In FY 2012, there were \$27.5 million in obligations and a recovery from previous construction obligations of \$58.4 million, resulting in a net recovery of \$30.9 million.

<sup>2</sup> In FY 2014, there were \$69.8 million in obligations and a recovery from previous construction obligations of \$10 million, resulting in a net obligation of \$59.8 million.

<sup>3</sup> In FY 2015, there were \$42.7 million in obligations and a recovery from previous construction obligations of \$55.1 million, resulting in a net recovery of \$12.5 million. Numbers don't add due to rounding.

## MAJOR BUILDING RENOVATIONS AND REPAIR COSTS

A number of SSA facilities need renovation or repair to comply with current building codes, including health and safety standards to ensure a safe work environment. SSA is also actively pursuing opportunities to reduce our real estate footprint by reconfiguring and consolidating space for optimal space utilization. This exhibit describes our major building renovations, repairs, and other associated costs in support of these goals.

Building	FY 2016 (in millions)	FY 2017 (in millions)	FY 2018 (in millions)
Altmeyer (Woodlawn, MD)	\$13	\$137	
NCC Third Floor (Woodlawn, MD)	\$22.5	\$3.85	
Security West (Woodlawn, MD)	\$24		\$20.4
Frank Hagel Building (Richmond, CA)		\$12.7	
Addabbo (New York, NY)		\$13.7	
MATSSC (Philadelphia, PA)		\$9.045	

### **Altmeyer Building**

The Arthur J. Altmeyer federal office building is over 55 years old and requires major upgrades to address health and safety issues, meet current accessibility standards, improve space utilization, and provide a comfortable, energy efficient working environment that meets 21<sup>st</sup> century standards. The Altmeyer renovation project involves full interior and exterior renovation of the existing building including infrastructure, electrical system, and space. The improved space utilization would create space for about 300 to 350 additional staff, for a total of 800 occupants.

The renovation for which we received \$150 million in fiscal year 2016 includes the following:

- Taking the building down to the support structure (concrete columns and floor slabs),
- Full abatement of hazards (asbestos, lead paint, etc.),
- Building systems modernizations, and
- Space reconfiguration to achieve an office space utilization rate of 149 square feet per person for post-renovation occupancy.

### *Timeline and Costs*

Timeline	Milestones	Cost (in millions)
FY 2016	Funding appropriated; GSA begins solicitation for design services contractor	\$13
FY 2017	GSA awards contract for design services and begins solicitation for construction contractor	\$137
FY 2019	GSA awards contract for construction services; executives and staff vacate the building; construction begins	N/A
FY 2021	Occupy renovated building	N/A

### **National Computer Center – Third Floor Renovation**

The National Computer Center (NCC) Third Floor Renovation Project follows the 2016 migration of SSA's primary data center operations from that space to the National Support Center. The planned renovation involves approximately 75,000 Usable Square Feet (USF).

The SSA Headquarters Master Plan, completed in September 2013, identified this project as integral to the goal of creating a dense campus and reducing leased space. The renovation will provide office space for approximately 500 people and free up swing space on campus for staff from the Altmeyer Building during that renovation. The office configuration identified in the NCC Feasibility Study provides for a more efficient layout that achieves a utilization rate of approximately 160 USF per person.

GSA accepted an FY 2015 RWA for \$1.7 million from SSA for the design phase of the project and is working with one of their IDIQ Architecture and Engineering firms, WRA, to complete the design. This phase is projected to be completed in August 2016.

#### *Timeline and Costs*

Timeline	Milestones	Cost (in millions)
FY 2016	Construction funding	\$22.5
FY 2017	Furniture design and acquisition and move cost funding needed	\$3.85
FY 2018	Construction and furniture installation completed; occupy renovated space	N/A

### **Security West**

We plan to optimize space for the Office of Disability Operations (ODO) components housed in the Security West building and consolidate with the Office of Central Operations training center when the Security West lease expires in 2020. This consolidation will reduce our real estate footprint, improve operational efficiency, allow greater flexibility for functional groups, and enhance security. This effort supports the vision of the SSA Headquarters Campus Master Plan, completed in September 2013, to make more efficient use of leases and house, and staff more efficiently on the Main Campus and in the surrounding Woodlawn, Maryland area.

A recently completed Program of Requirements (POR) recommends housing staff in multiple leases to provide strategic flexibility and accommodate a limited real estate market. The POR achieves a 40 percent reduction in space; we currently lease 759,222 usable square feet (USF), and the new requirement is 444,300 USF.

*Timeline and Costs*

Timeline	Milestones	Cost (in millions)
FY 2016*	Funding needed for tenant improvements and construction management services.	\$24
FY 2018	GSA awards lease; funding needed for furniture design and acquisition. (\$19.1) Complete design and begin construction; funding needed for move costs. (\$1.3)	\$20.4
FY 2019	Occupy new leased space	N/A

\*Timeline and milestones for FY 2016 are tentative, dependent on available funding

**Frank Hagel Federal Building**

The six-story Frank Hagel Federal Building (FHFB), Richmond, CA, was completed and occupied in 1975. Over time, modifications to the interior space to accommodate staffing and work process changes adversely affected fire egress, heating, ventilation and air conditioning (HVAC) operation, electrical and lighting distribution, resulting in health, safety, and code compliance issues, which potentially expose employees to an unsafe work environment. GSA identified these deficiencies as high risk in a feasibility study/Building Evaluation Report completed in FY 2014.

We initiated a Space Utilization Analysis and Feasibility Study to identify and analyze efficient and cost effective options for housing SSA staff in the area. Study findings document needed renovations.

To address immediate, pressing issues, we plan to renovate two floors, updating the electrical and lighting distribution, HVAC, and fire safety systems, and realigning space. The renovations will bring these systems in compliance with current building and life safety codes. We expect to need similar amounts in future years until we complete renovations.

*Timeline and Costs*

Timeline	Milestones	Cost (in millions)
FY 2017	Renovations	\$12.7

**Addabbo Building**

The Addabbo Federal Building, Jamaica/Queens, NY, which is over 27 years old, needs FY 2017 funding for five repair line items to address issues with aging infrastructure. These include repairing or upgrading main electrical switchgear, step-down transformers, and windows on the

ground and second floors. The emergency control center project improves security by renovating a dysfunctional space, improving lines of sight, and increasing threat protection. The child care center window project adds blast resistant glass to the recently renovated indoor child playground area. These needs were identified through ongoing building evaluations.

*Timeline and Costs*

Timeline	Milestones	Cost (in millions)
FY 2017	Repairs	\$13.7

**Midatlantic Social Security Center (MATSSC)**

The MATSSC, Philadelphia, PA, which is over 40 years old, needs FY 2017 funding for two repair line items to address water intrusion issues. The building has experienced water intrusions from the plaza for many years resulting in numerous leaks in the basement areas, some causing problems with the electrical infrastructure and potential beginnings of structural damage. The other project will address ground water drainage, which places increasing burden on aging and failing sump pumps. Failure to address and resolve these deficiencies could result in building closure.

*Timeline and Costs*

Timeline	Milestones	Cost (in millions)
FY 2017	Repairs	\$9.045

## **SSA-RELATED LEGISLATION ENACTED FEBRUARY 3, 2015 – FEBRUARY 9, 2016**

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### **FY 2016**

#### ***The Federal Improper Payments Coordination Act of 2015 (P.L. 114-109, enacted December 18, 2015)***

- The bill provides that Federal agencies shall review, as appropriate, SSA's death records through the Do Not Pay (DNP) initiative. However, the bill does not amend section 205(r) of the Social Security Act, and thus does not permit the use of SSA's full file of death information by the DNP system.

#### ***The Bipartisan Budget Act of 2015 (P.L. 114-74, enacted November 2, 2015)***

- The act reallocates funds from the Old-Age and Survivors Insurance (OASI) trust fund to the Disability Insurance (DI) trust fund to ensure payment of full disability benefits into 2022.
- The act also suspends the debt limit until March 15, 2017; partially rolls back the sequester of discretionary spending scheduled for FY 2016 and FY 2017; and reduces the amount of increase in Medicare Part B premiums for certain beneficiaries in 2016.
- The bill provides adjustments to civil monetary penalties (CMPs) and makes reforms to the Social Security Program.

### **FY 2015**

#### ***The Medicare Access and CHIP Reauthorization Act of 2015 (P.L. 114-10 enacted April 16, 2015)***

- The law reauthorizes the Children's Health Insurance Program (CHIP) and repeals the Medicare sustainable growth rate.
- The act also requires the Secretary of Health and Human Services (the Secretary), in consultation with the Commissioner of Social Security (Commissioner) to establish procedures to ensure that a Social Security Number (SSN) or an SSN-derivative is not displayed, coded, or embedded on the Medicare card.

## **MEDICARE ACCESS AND CHIP REAUTHORIZATION ACT (MACRA)**

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On April 16, 2015, the President signed the Medicare Access and CHIP Reauthorization Act of 2015 (MACRA) (Public Law 114-10). Title V, section 501, prohibits displaying, coding, or embedding Social Security numbers (SSN) on beneficiaries' Medicare cards. The Centers of Medicare and Medicaid Service (CMS) will issue Medicare cards with a new Medicare Beneficiary Identifier (MBI) that replaces SSNs. CMS plans to issue the new cards in a phased approach from May 2018 to April 2019.

Congress appropriated the Social Security Administration (SSA) \$98 million to fund the implementation costs to comply with the provisions of MACRA. Beginning fiscal year (FY) 2015, we receive the funding incrementally through FY 2018. The funding is available in the following amounts:

- FY 2015 - \$27 million (available through FY 2018);
- FY 2016 - \$22 million (available through FY 2018);
- FY 2017 - \$22 million (available through FY 2018); and
- FY 2018 - \$27 million (available until expended).

SSA does not anticipate intensive systems changes to support CMS in the SSN Removal Initiative and implementation of MACRA. However, we expect a significant impact on our workload processing components due to undeliverable mail, inquiries from the public, and requests for replacement cards. CMS outreach activities and phased Medicare card issuance will not begin until 2018. Therefore, we do not foresee an impact to our field operations or major costs incurred until that same year. SSA will have limited spending in FY 2015-2017 for planning, inquiries, and system updates.

## **IMPLEMENTATION OF THE BIPARTISAN BUDGET ACT OF 2015**

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The Bipartisan Budget Act of 2015 (P.L. 114-74) (BBA) was enacted on November 2, 2015. The BBA contained numerous provisions affecting SSA. Below is a brief summary.

### **301. Debt Collection Improvements**

This provision amends the Communications Act of 1934 to authorize the use of automated telephone equipment to call cellular telephones for the purpose of collecting debts owed to the U.S. Government. In addition, it authorizes the Federal Communications Commission, in consultation with the Department of the Treasury, to issue regulations to limit the number and duration of any such calls.

### **601. Maintaining 2016 Medicare Part B Premium and Deductible Levels Consistent with Actuarially Fair Rates**

This section establishes the 2016 monthly Part B premium for enrollees not subject to the "hold harmless" provision. It requires these enrollees to pay an additional \$3 to cover the cost of

setting the premium rate, requires enrollees subject to an Income-Related Monthly Adjustment Amount to pay an additional charge that is higher than \$3, and extends those provisions through 2017 if there is no Social Security cost-of-living-allowance increase that year.

#### 701. Civil Monetary Penalty (CMP) Inflation Adjustments

Section 701 requires the head of each Federal agency to adjust CMPs within its jurisdiction for inflation each year, based on the cost-of-living increase in the Consumer Price Index (CPI). By July 1, 2016, affected agencies are to establish the first inflation adjustment based on the percentage by which the CPI for 2015 exceeds the CPI of the year the CMP was first established, or last adjusted. The provision also requires affected agencies to include information about CMPs and adjustments in their Agency Financial Report.

#### 811. Expansion of Cooperative Disability Investigations Units (CDIUs)

This provision requires SSA to establish CDIUs to cover all 50 States, D.C., Puerto Rico, Guam, the Northern Mariana Islands, the Virgin Islands, and American Samoa, subject to funding and participation of local law enforcement agencies. SSA is to submit annual progress reports to the House Committee on Ways and Means and the Senate Finance Committee until nationwide coverage is achieved.

#### 812. Exclusion of Certain Medical Sources of Evidence

Section 812 excludes evidence provided by people convicted of certain felonies, excluded from participation in Federal health care programs, or assessed with a civil monetary penalty for submission of false evidence. The provision also includes a good cause exception as determined by SSA.

#### 813. New and Stronger Penalties

This provision increases the penalty for conspiracy to commit Social Security fraud and certain offenses committed by people violating positions of trust. It also requires SSA to add new language to applications for benefits, and to update language in publications.

#### 814. References to Social Security and Medicare in Electronic Communications

Section 814 includes electronic and internet communications in the prohibitions from misusing Social Security or Medicare symbols, emblems, or names, and treats each dissemination, viewing, or accessing of a communication as a separate violation. Conforming amendments to regulations at 20 CFR Part 498 are required to reflect this modification.

#### 815. Change to Cap Adjustment Authority

This provision adjusts discretionary spending limits for FY2017 - FY2021. It contains additional specifications on the activities covered by the discretionary spending limits and have specifically included the costs of Cooperative Disability Investigations Units and fraud prosecutions by U.S.



Attorneys. It also clearly defines the use of the fund for work related continuing disability reviews.

#### 821. Temporary Reauthorization of Disability Insurance Demonstration Project Authority

Section 821 extends authority to initiate disability insurance demonstration projects through December 31, 2021, and continues such projects through December 31, 2022.

#### 822. Modification of Demonstration Project Authority

This section requires SSA to ensure all participation in demonstration projects is voluntary, and to obtain informed written consent from all participants. It also revises reporting requirements for demonstration projects, and amends the annual reporting deadline to the House Committee on Ways and Means and the Senate Committee on Finance to September 30, 2016 (formerly June 9).

#### 823. Promoting Opportunity Demonstration Project

This provision requires SSA to establish a five-year demonstration project to test a benefit offset of \$1 for every \$2 of earnings in excess of a specific threshold.

#### 824. Use of Electronic Payroll Data to Improve Program Administration

Section 824 permits SSA to establish exchanges with payroll data providers to obtain wage data to administer the disability and SSI programs and prevent improper payments. It authorizes SSA to require claimants to provide authorization to obtain payroll data. The agency is to publish a Federal Register notice describing exchanges with payroll providers created under this section, and publish regulations implementing SSA's access to and use of information held by payroll providers.

#### 825. Treatment of Earnings Derived from Services

For purposes of an initial determination of Title II disability, this section establishes a rebuttable presumption that earnings were earned in the month in which the services were performed; in any other case, it establishes the rebuttable presumption that earnings were earned in the month in which such earnings were paid.

#### 826. Electronic Reporting of Earnings

This provision requires SSA to establish and implement a system permitting disability insurance beneficiaries to report their earnings electronically.

#### 831. Closure of Unintended Loopholes (Aggressive Claiming)

Section 831 automatically deems a claimant who applies for retirement benefits to have applied for any spousal benefit for which he or she is eligible, and automatically deems a claimant who

applies for a spousal benefit based on age to have applied for his or her retirement benefit if he or she is eligible. It also prohibits a person from receiving retroactive benefits for a period of voluntary suspension or benefits based on the earnings of an individual who has suspended his or her benefits during the suspension, and prohibits an individual whose benefits are suspended from receiving benefits on any other record during the suspension.

#### 832. Requirement for Medical Review

This section requires SSA to make every reasonable effort to ensure that a qualified physician (or psychiatrist or psychologist in mental cases) has completed the medical portion of the case review unless good cause is shown. This provision also removes single decision maker (SDM) authority in all disability processing sites, requiring licensed physicians review all disability determinations.

#### 833. Reallocation of Payroll Tax Revenue

This provision increased the portion of the payroll tax on wages and self-employment income allocated to the DI Trust Fund by 0.57 percent, effective January 1, 2016 through December 31, 2018.

#### 834. Access to Financial Information for Waivers and Adjustments of Recovery

Section 834 requires SSA to obtain a claimant's authorization to obtain financial institution records before waiving overpayment recovery under the "defeats the purpose" provision, and permits SSA to refuse the waiver if the claimant refuses to grant such authorization.

#### 841. Interagency Coordination to Improve Program Administration

This section requires SSA and the Office of Personnel Management to enter into an agreement that will allow SSA to withhold past-due disability benefits to offset any Federal Employee Retirement System disability annuity overpayment caused by such disability benefits.

#### 842. Elimination of Quinquennial Determinations Relating to Wage Credits for Military Service Prior to 1957

This provision eliminates the requirement for quinquennial determinations for pre-1957 military service wage credits after the 2010 determination.

#### 843. Certification of Benefits Payable to a Divorced Spouse of a Railroad Worker to the Railroad Retirement Board

Section 843 allows SSA to electronically certify to the Railroad Retirement Board benefits due to a divorced spouse of a railroad worker.

844. Technical Amendments to Eliminate Obsolete Provisions

This section removes two obsolete provisions of the Social Security Act related to Medicare, the former §226(i) and §226A(c).

845. Reporting Requirements to Congress

This provision requires SSA to submit three new annual reports to Congress: Fraud and Improper Payment Prevention Report, to be submitted with the agency's annual budget; Work-Related Continuing Disability Review Report, to be submitted to the House Committee on Ways and Means and the Senate Committee on Finance; and Overpayment Waiver Report, to be submitted to the House Committee on Ways and Means and the Senate Committee on Finance.

846. Expedited Examination of Administrative Law Judges (ALJs)

Section 846 allows SSA to request additional examinations for ALJs from the Office of Personnel Management, the first exams would be held by April 1, 2016, and other exams no later than December 31, 2022. SSA will pay all costs associated with ALJ exams.

## BUDGETARY RESOURCES

The LAE account represents SSA's administrative budget for carrying out its responsibilities under the Social Security Act. This includes administering the OASI, DI, SSI and Special Benefits for Certain WWII Veterans programs and supporting the Centers for Medicare and Medicaid Services in administering the HI, SMI, and Medicare Part D programs. The President's Budget for the LAE account in FY 2017 is \$13.067 billion.

### AMOUNTS AVAILABLE FOR OBLIGATION

**Table 3.6—Amounts Available for Obligation<sup>1,2</sup>**  
(dollars in thousands)

	FY 2015 Actual	FY 2016 Enacted	FY 2017 Estimate
<b>LAE</b>			
LAE Appropriation	\$11,805,945	\$12,161,945	\$13,067,000
<b>Unobligated Balance, start-of-year</b>	\$469,609	\$180,208	\$262,000
Recoveries and Transfers	\$39,754	\$25,308	\$25,308
Unrealized Non-Attorney User Fees	-\$811	\$0	\$0
<b>Subtotal LAE Resources</b>	<b>\$12,314,496</b>	<b>\$12,367,461</b>	<b>\$13,354,308</b>
Unobligated Balance, lapsing	-\$91,277	\$0	\$0
Unobligated Balance, end-of-year (LAE Carryover) <sup>3</sup>	-\$56,625	-\$162,308	-\$25,308
<b>Total Obligations, LAE</b>	<b>\$12,166,594</b>	<b>\$12,205,153</b>	<b>\$13,329,000</b>
<b>American Recovery and Reinvestment Act Resources (ARRA)<sup>4</sup></b>			
<b>National Support Center Unobligated Balances, start-of-year</b>	\$40,987	\$53,438	\$0
National Support Center Estimated Recovery	\$55,127	\$0	\$0
National Support Center Unobligated Balances, end-of-year	-\$53,438	\$0	\$0
<b>Obligations, Recovery Act</b>	<b>\$42,676</b>	<b>\$53,438</b>	<b>\$0</b>
<b>MIPPA – LIS</b>			
<b>Unobligated Balances, start-of-year</b>	<b>\$11,820</b>	<b>\$11,744</b>	<b>\$5,872</b>
Unobligated Balances, end-of-year	-\$11,744	-\$5,872	\$0

Table Continues on the Next Page

<sup>1</sup> Totals may not add due to rounding.

<sup>2</sup> Totals do not include reimbursables.

<sup>3</sup> The majority of the FY 2016 unobligated balance, end-of-year (LAE Carryover), comprises funding for the Altmeyer renovation (\$137M). Please refer to the Major Building Renovations exhibit on page 118 for additional information.

<sup>4</sup> SSA received a Presidential waiver from rescission allowing for the use of ARRA NSC funds until expended.

<b>Obligations, MIPPA – LIS</b>	<b>\$77</b>	<b>\$5,872</b>	<b>\$5,872</b>
<b>State Children’s Health Insurance Program (SCHIP)</b>			
<b>Unobligated Balances, start-of-year</b>	<b>\$2,074</b>	<b>\$2,051</b>	<b>\$1,026</b>
Unobligated Balances, end-of-year	-\$2,051	-\$1,026	\$0
<b>Obligations, SCHIP</b>	<b>\$23</b>	<b>\$1,026</b>	<b>\$1,026</b>
<b>Medicare Access and CHIP Reauthorization Act (MACRA)<sup>1</sup></b>			
<b>Unobligated Balances, start-of-year</b>	<b>\$0</b>	<b>\$26,983</b>	<b>\$44,150</b>
Expenditure Transfers from Trust Funds	\$27,000	\$22,000	\$22,000
Unobligated Balances, end-of-year	-\$26,983	-\$44,150	-\$61,317
<b>Obligations, MACRA</b>	<b>\$17</b>	<b>\$4,833</b>	<b>\$4,833</b>

### BUDGET AUTHORITY AND OUTLAYS

The LAE account is funded by the Social Security Trust Funds, the General Fund, the Medicare Trust Funds, and applicable user fees. Section 201(g) of the Social Security Act provides that SSA determine the share of administrative expenses that should have been borne by the appropriate trust funds for the administration of their respective programs and the General Fund for administration of the SSI program. SSA calculates the administrative costs attributable to each program using its Government Accountability Office approved cost analysis system. In FY 2009, SSA received additional funds from the General Fund of the Treasury, provided by the Recovery Act and the MIPPA. SSA will also receive \$98 million funded incrementally from FY 2015 to FY 2018 for implementation costs associated with the MACRA provisions.

**Table 3.7—Budget Authority and Outlays**  
(dollars in thousands)<sup>2</sup>

	<b>FY 2015<sup>3</sup></b>	<b>FY 2016<sup>4</sup></b>	<b>FY 2017<sup>5</sup></b>
	<b>Actual</b>	<b>Enacted</b>	<b>Estimate</b>
OASI and DI Trust Funds <sup>6</sup>	\$5,344,291 <sup>7</sup>	\$5,596,112 <sup>8</sup>	\$5,702,038 <sup>9</sup>
HI and SMI Trust Funds	\$1,755,376	\$1,777,800	\$2,001,330
SSA Advisory Board	\$2,300	\$2,300	\$2,500

**Table Continues on the Next Page**

<sup>1</sup> Congress appropriated SSA \$98 million to fund the implementation costs to comply with the provisions of the Medicare Access and CHIP Reauthorization Act of 2015. SSA will receive the funding incrementally. The available funding amount for each fiscal year is as follows: FY 2015 - \$27 million (available through FY 2018); FY 2016 - \$22 million (available through FY 2018); FY 2017 - \$22 million (available through FY 2018); and FY 2018 - \$27 million (available until expended).

<sup>2</sup> Totals may not add due to rounding.

<sup>3</sup> In FY 2015 our administrative costs were about 1.3 percent of the benefit payments we paid.

<sup>4</sup> In FY 2016 our administrative costs are about 1.3 percent of the benefit payments we plan to pay.

<sup>5</sup> In FY 2016 our administrative costs are about 1.3 percent of the benefit payments we plan to pay.

<sup>6</sup> OASDI includes funding for administration of the Special Benefits for Certain World War II Veterans.

<sup>7</sup> The total includes \$2,785,301 in DI and \$2,558,990 in OASI costs.

<sup>8</sup> The total includes \$2,924,160 in DI and \$2,671,952 in OASI costs.

<sup>9</sup> The total includes \$2,964,663 in DI and \$2,737,375 in OASI costs.

## Limitation on Administrative Expenses

	FY 2015 Actual	FY 2016 Enacted	FY 2017 Estimate
SSI Administrative Expenses	\$4,578,978	\$4,648,733	\$5,234,132
SSI State Supplement User Fees	\$124,000	\$136,000	\$126,000
Non-Attorney Representative User Fees	\$1,000	\$1,000	\$1,000
MIPPA – LIS	N/A	N/A	N/A
MACRA	\$27,000	\$22,000	\$22,000
Recovery Act	N/A	N/A	N/A
<b>Total Budget Authority</b>	<b>\$11,832,945</b>	<b>\$12,183,945</b>	<b>\$13,089,000</b>
OASI and DI Trust Funds <sup>1</sup>	\$5,387,876 <sup>2</sup>	\$5,680,158 <sup>3</sup>	\$5,771,443 <sup>4</sup>
HI and SMI Trust Funds	\$1,771,000	\$1,806,100	\$2,026,600
SSI Administrative Expenses	\$4,809,424	\$4,708,042	\$5,282,857
SSI State Supplement User Fees	\$124,000	\$136,000	\$126,000
Non-Attorney Representative User Fees	\$1,000	\$1,000	\$1,000
MIPPA – LIS	\$77	\$5,872	\$5,872
MACRA	\$0	\$4,833	\$4,833
Recovery Act - Workload Processing	\$0	\$0	\$0
Recovery Act - Economic Recovery	\$0	\$0	\$0
Recovery Act - New NSC	\$63,131	\$47,100	\$43,600
<b>Total Administrative Outlays</b>	<b>\$12,156,508</b>	<b>\$12,389,105</b>	<b>\$13,262,205</b>

<sup>1</sup> OASDI includes funding for administration of the Special Benefits for Certain World War II Veterans.

<sup>2</sup> The total includes \$2,750,176 in DI and \$2,637,700 in OASI costs.

<sup>3</sup> The total includes \$2,963,158 in DI and \$2,717,000 in OASI costs.

<sup>4</sup> The total includes \$2,996,443 in DI and \$2,775,000 in OASI costs.

### PROGRAM INTEGRITY

The following table provides a consolidated account of the total funding required for CDRs and redeterminations for FY 2015 through FY 2017. For more information about SSA's program integrity efforts, please refer to page 107.

**Table 3.8—Program Integrity  
(dollars in millions)**

	<b>FY 2015 Actual<sup>1</sup></b>	<b>FY 2016 Estimate<sup>2</sup></b>	<b>FY 2017 Estimate<sup>3</sup></b>
Full Medical CDRs Completed	799,013	850,000	1,100,000
SSI Non-Medical Redeterminations Completed	2,266,992	2,522,000	2,822,000
Funding			
Dedicated Program Integrity Funding	\$1,396	\$1,426	\$1,819
Related LAE Funding <sup>4</sup>	\$9	\$100 <sup>5</sup>	\$59

The following table satisfies SSA's requirement directed by the House Report.

**Table 3.9 - FY 2015 SSA Program Integrity (PI) Spending  
(dollars in thousands)**

	<b>Total PI Obligations<sup>6</sup></b>
OASI	\$ 139,700
DI	\$ 241,100
SSI	\$ 912,600
HI	\$ 52,900
SMI	\$ 59,100
<b>Total</b>	<b>\$ 1,405,400</b>

<sup>1</sup> FY 2015 actual represents the combined costs of CDRs and SSI redeterminations in FY 2015, including the \$1.396 billion in the base and cap adjustment (as authorized by the Budget Control Act) and an additional \$9 million from LAE. The FY 2015 Omnibus authorized the use of up to \$131 million from LAE for Program Integrity activities.

<sup>2</sup> FY 2016 estimate represents \$1.426 billion in the base and cap adjustment (as authorized by the Bipartisan Budget Act) for dedicated program integrity funding and an additional \$116 million from LAE. We estimate needing \$100 million of the \$116 million to fully fund the PI workload.

<sup>3</sup> FY 2017 estimate represents \$1.819 billion in the base and cap adjustment (as authorized by the Bipartisan Budget Act) for dedicated program integrity funding and an additional \$59 million from LAE.

<sup>4</sup> Funding reflects the fully loaded costs of performing CDRs and SSI redeterminations.

<sup>5</sup> The FY 2016 Omnibus authorizes the use of up to \$116 million from LAE; SSA estimates using \$100 million from LAE.

<sup>6</sup> Represents the full cost of completing Continuing Disability Reviews and SSI Redeterminations as authorized by the Budget Control Act of 2011 (PL 112-25). Continuing Disability Review (CDR) costs include the cost of processing Medical and Work CDRs and excludes the cost of Medical CDR appeals, which is not consistent with costs reported in the CDR Report to Congress. For a description of anti-fraud activities, please see the Budget Overview.

## KEY ASSUMPTIONS AND COST DRIVERS

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We continue to do everything we can to reduce our operating costs. Nevertheless, as our beneficiary population increases each year, our costs continue to rise. While some of our programs have discrete cost-drivers associated with them, the majority of cost-drivers affect all programs.

We formulated this budget to address the following challenges:

- High demand for services due to the aging population, see [Social Security Beneficiary Statistics](#);
- Disability appeals hearings backlog;
- Complex disability process, see [Social Security Disability](#);
- Growth in non-traditional SSA workloads (e.g., Medicare, ACA, and verifications for other programs);
- Combatting waste, fraud and abuse;
- Reducing improper payments and completing cost-effective program integrity work, see [Social Security Improper Payments](#);
- Finding additional efficiencies and streamlining business processes;
- Modernizing our service delivery;
- Modernizing computer systems;
- Cyber threats; and
- Rising infrastructure costs.

Please see the performance table 3.4 for clarity for projected work completed for our major workloads, as well as our productivity numbers.



## ANALYSIS OF CHANGES

The FY 2017 request for the LAE account represents a \$1.1 billion increase over the FY 2016 level. The following tables provide a summary of the changes from the FY 2016 level to the FY 2017 President's Budget.

**Table 3.10—Summary of Changes from FY 2016 to FY 2017<sup>1</sup>**  
(dollars in thousands)

	<b>FY 2016 Enacted</b>	<b>FY 2017 Estimate</b>	<b>FY16 to FY17 Change</b>
<b>Total LAE</b>	<b>\$12,367,461</b>	<b>\$13,354,308</b>	<b>+ \$986,847</b>
Appropriation	\$12,161,945	\$13,067,000	+ \$905,055
Amounts Available From Prior Year Unobligated Balances	\$205,516	\$287,308	- \$81,792
<b>Obligations, LAE</b>	<b><u>\$12,205,153</u></b>	<b><u>\$13,329,000</u></b>	<b>+ <u>\$1,123,847</u></b>
Unobligated Balance, end-of- year <sup>2,3</sup>	\$162,308	\$25,308	-\$137,000
<b>Recovery Act Obligations</b>	<b><u>\$53,438</u></b>	<b><u>\$0</u></b>	<b>- <u>\$53,438</u></b>
National Support Center	\$53,438	\$0	- \$53,438
<b>MIPPA - LIS Obligations</b>	<b><u>\$5,872</u></b>	<b><u>\$5,872</u></b>	<b><u>\$0</u></b>
<b>SCHIP Obligations</b>	<b><u>\$1,026</u></b>	<b><u>\$1,026</u></b>	<b><u>\$0</u></b>
<b>MACRA<sup>3</sup></b>	<b><u>\$4,833</u></b>	<b><u>\$4,833</u></b>	<b><u>\$0</u></b>
<b>Obligations, Total</b>	<b><u>\$12,270,321</u></b>	<b><u>\$13,340,731</u></b>	<b>+ <u>\$1,070,410</u></b>

<sup>1</sup> Totals do not include reimbursables and may not add due to rounding.

<sup>2</sup> Unobligated Balance end-of-year reflects \$25,308,063 in FY 2015 Delegated Buildings carryover.

<sup>3</sup> The majority of the FY 2016 unobligated balance, end-of-year comprises funding for the Altmeyer renovation (\$137M). Please refer to the Major Building Renovations exhibit on page 118 for additional information.

<sup>3</sup> Congress appropriated SSA \$98 million to fund the implementation costs to comply with the provisions of the Medicare Access and CHIP Reauthorization Act of 2015. SSA will receive the funding incrementally. The available funding amount for each fiscal year is as follows: FY 2015 - \$27 million (available through FY 2018); FY 2016 - \$22 million (available through FY 2018); FY 2017 - \$22 million (available through FY 2018); and FY 2018 - \$27 million (available until expended).

**Table 3.11—Explanation of LAE Budget Changes from FY 2016 to FY 2017**  
(dollars in thousands)<sup>1</sup>

	FY 2016		Change from FY 2016	
	Federal WYs <sup>2</sup>	Obligations	Federal WYs <sup>2</sup>	Obligations
<b><u>BUILT-IN INCREASES</u></b>				
<b><u>Payroll Expenses</u></b>	65,832	\$6,896,741		\$220,824
Increases due to periodic step increases, health benefits, career ladder promotions, and new employees hired under the Federal Employees Retirement System				125,093
Three-month effect of assumed Federal pay increase effective January 2016 – 1.3%				20,326
Nine-month effect of assumed Federal pay increase effective January 2017 – 1.6%				75,406
<b><u>Non-Payroll Costs</u></b>				
Mandatory growth in non-payroll costs, including higher costs of rent, security, and guard services		\$1,874,854		\$69,114
<b><u>State Disability Determination Services</u></b>				
Mandatory growth in State DDS costs, including pay raises and the cost of medical evidence		\$2,372,662		\$29,667
<b>Subtotal, Built-In Increases</b>				<b>+\$319,605</b>
<b><u>PROGRAM INCREASES</u></b>				
<b><u>Net Increase in WYs<sup>3</sup></u></b>			2,806	\$301,370
<b><u>Non-Payroll Costs</u></b>		\$125,037		\$16,063
<b><u>Net Increase in State Disability Determination Services</u></b>				\$111,670
<b><u>Social Security Statements Mailed</u></b>		\$22,237		\$2,696

Table Continues on the Next Page

<sup>1</sup> Totals may not add due to rounding.

<sup>2</sup> Excludes workyears associated with MACRA funding.

<sup>3</sup> The FY 2017 WYs increase is largely due to the necessary overtime needed to process Program Integrity.

	FY 2016		Change from FY 2016	
	Federal WYs	Obligations	Federal WYs	Obligations
<b><u>Funding for IT<sup>1</sup></u></b>		\$720,413		\$352,196
<b>Subtotal, Program Increases</b>			2,806	<b>+\$783,995</b>
<b>Total Increases</b>			<b>+2,806</b>	<b>\$1,103,600</b>
<b><u>BUILT-IN DECREASES</u></b>				
<b><u>Payroll Expenses</u></b>				
Decrease due to two fewer paid days				-\$48,545
<b><u>PROGRAM DECREASES</u></b>				
<b><u>Decreases in Obligations Funded from Other Prior-Year Unobligated Balances</u></b>		\$180,208		-\$55,208
<b><u>Recovery Act – New NSC Resources</u></b>				
Non-personnel Costs		\$53,438		-\$53,438
<b>Total Decreases</b>				<b>-\$157,191</b>
<b><u>OTHER OBLIGATIONS</u></b>				
<b><u>MIPPA – LIS</u></b>		\$5,872		\$0
<b><u>State Children’s Health Insurance Program (SCHIP)</u></b>		\$1,026		\$0
<b><u>Altmeyer</u></b>		\$13,000		\$124,000
<b><u>Medicare Access &amp; CHIP Reauthorization Act<sup>2</sup> (MACRA)</u></b>		\$4,833		\$0
<b>Total LAE Obligations, Net Change</b>	<b>65,832</b>	<b>\$12,270,321</b>	<b>+2,806</b>	<b>+\$1,070,410</b>

<sup>1</sup> Planned obligations for Information Technology also include obligations funded from prior-year unobligated balances in the amounts of \$180 million in FY 2016 and \$125 million in FY 2017. The FY 2017 IT funding increase represents the amount needed to bring our agency spending to historical levels, and also includes funding for IT Modernization and Cyber Security.

<sup>2</sup> Congress appropriated SSA \$98 million to fund the implementation costs to comply with the provisions of the Medicare Access and CHIP Reauthorization Act of 2015. SSA will receive the funding incrementally. The available funding amount for each fiscal year is as follows: FY 2015 - \$27 million (available through FY 2018); FY 2016 - \$22 million (available through FY 2018); FY 2017 - \$22 million (available through FY 2018); and FY 2018 - \$27 million (available until expended).

## BUDGETARY RESOURCES BY OBJECT

Table 3.12—Budgetary Resources by Object<sup>1,2,3,4</sup>

(dollars in thousands)

	FY 2016	FY 2017	Change
Personnel Compensation			
Permanent positions	\$4,940,108	\$5,167,063	\$226,955
Positions other than permanent	\$139,150	\$145,111	\$5,961
Other personnel compensation	\$104,929	\$203,647	\$98,718
Special personal service payments	\$5,387	\$5,509	\$122
Subtotal, personnel compensation	\$5,189,573	\$5,521,330	\$331,757
Personnel Benefits	\$1,718,899	\$1,860,791	\$141,892
Travel and transportation of persons	\$24,096	\$24,372	\$277
Transportation of things	\$5,751	\$5,816	\$65
Rent, communications, and utilities			
Rental payments to GSA	\$716,412	\$714,659	- \$1,753
Rental payments to others	\$438	\$440	\$1
Communications, utilities, misc.	\$446,651	\$516,724	\$70,072
Printing and reproduction	\$22,386	\$22,633	\$247
Other services (DDS, guards, etc.)	\$3,803,312	\$4,138,146	\$334,835
Supplies and materials	\$28,305	\$28,617	\$312
Equipment	\$197,640	\$252,430	\$54,790
Land and structures	\$73,141	\$210,777	\$137,636
Grants, subsidies and contributions	\$17,305	\$17,495	\$191
Insurance claims and indemnities	\$26,208	\$26,497	\$289
Interest and dividends	\$4	\$4	\$1
<b>Total Obligations</b>	<b>\$12,270,321</b>	<b>\$13,340,731</b>	<b>\$1,070,409</b>
Resources not being obligated in the current year (carrying over or lapsing)	\$213,355	\$86,625	- \$126,731
<b>Total Budgetary Resources</b>	<b>\$12,483,677</b>	<b>\$13,427,355</b>	<b>\$943,679</b>
Payments to State DDS (funded from other services and communications, utilities, and misc.)	\$2,372,662	\$2,514,000	\$141,338

<sup>1</sup> Totals do not include reimbursables and may not add due to rounding.

<sup>2</sup> The obligations include the base LAE appropriation, LIS, SCHIP, NSC, MACRA, and the Altmeyer Renovation. Total budgetary resources in the table reflect FY 2016 and FY 2017 projections of spending by object class. Resources are not managed at the object class level and SSA has the flexibility within the LAE account to modify projected spending during the budget execution process.

<sup>3</sup> As required by the FY 2016 Omnibus Report provisions, we note that the total FY 2015 DDS obligations are \$2.262B, which includes personnel costs as well as medical and other workload support costs.

<sup>4</sup> As required by FY 2016 Omnibus General Provision 524, the Office of Communications estimates \$4 million of FY 2016 funds to be obligated for advertising.

The following tables satisfy SSA's requirement directed by the House Report.

**Table 3.13 — FY 2015 Physical Infrastructure Costs by Component**  
(dollars in thousands) <sup>1</sup>

Components	LAE One Year				Total Physical Infrastructure
	Rental Payment to GSA	Communications Utilities & Misc. Charges	Operations & Maintenance of Facilities <sup>2</sup>	Operations & Maintenance of Equipment	
Office of Operations	\$517,858	\$26,742	\$180,623	\$45	\$725,268
Office of Systems	\$0	\$0	\$1	\$0	\$1
Office of Disability Adjudication and Review	\$106,096	\$3,781	\$41,143	\$17	\$151,037
Office of Human Resources	\$0	\$2	\$335	\$1	\$337
Office of Retirement and Disability Policy	\$0	\$29	\$1	\$0	\$30
Office of the Chief Strategic Officer	\$0	\$1	\$0	\$0	\$1
Office of Budget, Finance, Quality and Management	\$4,454	\$103	\$545	\$0	\$5,103
Office of Budget, Finance, Quality and Management – Agency Level	\$79,974	\$155,280	\$84,394	\$499	\$320,147
Office of General Counsel	\$2,237	\$61	\$248	\$1	\$2,548
Office of General Counsel – Agency Level	\$0	\$48	\$0	\$0	\$48
Disability Determination Services	\$0	\$36,158	\$183	\$0	\$36,341
Information Technology Systems	\$0	\$245,496	\$0	\$378,661	\$624,158
Social Security Advisory Board	\$280	\$8	\$6	\$0	\$294
<b>Subtotal LAE One Year</b>	<b>\$710,899</b>	<b>\$467,710</b>	<b>\$307,480</b>	<b>\$379,225</b>	<b>\$1,865,314</b>
	LAE No Year				
Delegated Buildings	\$0	\$20,300	\$30,357	\$0	\$50,657
Information Technology Systems	\$0	\$0	\$0	\$438,292	\$438,292
National Support Center	\$0	\$4,100	\$11,950	\$16,661	\$32,710
<b>Subtotal LAE No Year</b>	<b>\$0</b>	<b>\$24,399</b>	<b>\$42,307</b>	<b>\$454,953</b>	<b>\$521,659</b>
<b>Grand Total <sup>3</sup></b>	<b>\$710,899</b>	<b>\$492,109</b>	<b>\$349,787</b>	<b>\$834,178</b>	<b>\$2,386,973</b>

<sup>1</sup> Totals may not add due to rounding.

<sup>2</sup> Includes guard services.

<sup>3</sup> Includes reimbursables.

**Table 3.14 — FY 2015 Physical Infrastructure Costs by Region**  
(dollars in thousands) <sup>1</sup>

Regions	LAE One Year and No Year				
	Rental Payment to GSA	Communications Utilities & Misc. Charges	Operations & Maintenance of Facilities <sup>2</sup>	Operations & Maintenance of Equipment	Total Physical Infrastructure
Boston	\$25,456	\$1,928	\$9,823	\$6	\$37,213
New York	\$85,446	\$5,959	\$34,878	\$16	\$126,299
Philadelphia	\$53,441	\$5,084	\$34,177	\$21	\$92,724
Atlanta	\$117,873	\$13,446	\$34,396	\$18	\$165,734
Chicago	\$94,321	\$8,298	\$38,981	\$39	\$141,640
Dallas	\$65,735	\$4,607	\$21,544	\$22	\$91,908
Kansas City	\$30,097	\$3,042	\$5,536	\$14	\$38,689
Denver	\$14,003	\$1,241	\$6,914	\$5	\$22,164
San Francisco	\$100,034	\$7,156	\$36,289	\$31	\$143,509
Seattle	\$24,896	\$1,444	\$8,372	\$3	\$34,716
Headquarters <sup>3</sup>	\$99,596	\$439,903	\$118,877	\$834,002	\$1,492,378
<b>Total <sup>4</sup></b>	<b>\$710,899</b>	<b>\$492,109</b>	<b>\$349,787</b>	<b>\$834,178</b>	<b>\$2,386,973</b>

<sup>1</sup> Totals may not add due to rounding.<sup>2</sup> Includes guard services.<sup>3</sup> Includes State DDSs, Social Security Advisory Board, ITS, NSC, and Delegated Buildings.<sup>4</sup> Includes reimbursables.

## BACKGROUND

### AUTHORIZING LEGISLATION

The LAE account is authorized by section 201(g) of the Social Security Act. The authorization language makes available for expenditure, out of any or all of the Trust Funds, such amounts as Congress deems appropriate for administering Title II, Title VIII, Title XVI, and Title XVIII of the Social Security Act for which SSA is responsible and Title XVIII of the Act for which the Secretary of the Department of Health and Human Services is responsible.

**Table 3.15—Authorizing Legislation**  
(dollars in thousands)

	<b>2015 Amount Authorized</b>	<b>2015 Actual<sup>1</sup></b>	<b>2016 Amount Authorized</b>	<b>2016 Enacted<sup>2</sup></b>	<b>2017 Amount Authorized</b>	<b>2017 Estimate<sup>3</sup></b>
<b>Title II, Section 201(g)(1) of the Social Security Act</b>	Indefinite	\$11,805,945	Indefinite	\$12,161,945	Indefinite	\$13,067,000

<sup>1</sup> The FY 2015 appropriation included \$1,396 million in dedicated funding for program integrity, \$124 million for SSI State Supplement user fees, and up to \$1 million from fees collected pursuant to section 303(c) of the Social Security Protection Act (P.L. 108-203).

<sup>2</sup> The FY 2016 appropriation included \$1,426 million in dedicated funding for program integrity, \$136 million for SSI State Supplement user fees, and up to \$1 million from fees collected pursuant to section 303(c) of the Social Security Protection Act (P.L. 108-203).

<sup>3</sup> The FY 2017 request includes \$1,819 million in dedicated funding for program integrity, \$126 million for SSI State Supplement user fees, and up to \$1 million from fees collected pursuant to section 303(c) of the Social Security Protection Act (P.L. 108-203).

## APPROPRIATION HISTORY

The table below includes the amount requested by the President, passed by the House and Senate Committees on Appropriations, and ultimately appropriated for the LAE account, including any rescissions and supplemental appropriations, for the last 10 years. The annual appropriation includes amounts authorized from SSI State Supplement user fees and, beginning in FY 2007, non-attorney representative user fees.

**Table 3.16—Appropriation History Table**

Fiscal Year	Budget Estimate to Congress	House Committee Passed	Senate Committee Passed	Enacted Appropriation
<b>2007</b>	\$9,496,000,000 <sup>1</sup>	\$9,293,000,000 <sup>2</sup>	\$9,093,000,000 <sup>3</sup>	<b>\$9,297,573,000</b> <sup>4</sup>
<b>2008</b>	\$9,596,953,000 <sup>5</sup>	\$9,696,953,000 <sup>6</sup>	\$9,721,953,000 <sup>7</sup>	\$9,917,842,000 <sup>8</sup>
Rescission <sup>9</sup>				-\$173,264,731
Final				<b>\$9,744,577,269</b>
Economic Stimulus Act <sup>10</sup>				\$31,000,000
<b>2009</b>	\$10,327,000,000 <sup>11</sup>	--- <sup>12</sup>	\$10,377,000,000 <sup>13</sup>	<b>\$10,453,500,000</b> <sup>14</sup>
MIPPA – Low Income Subsidy <sup>15</sup>				\$24,800,000
Recovery Act <sup>16</sup>				\$1,090,000,000
<b>2010</b>	\$11,451,000,000 <sup>17</sup>	\$11,446,500,000 <sup>18</sup>	\$11,446,500,000 <sup>19</sup>	\$11,446,500,000 <sup>20</sup>
Rescission <sup>21</sup>				-\$47,000,000
<b>2011</b>	\$12,378,863,280 <sup>22</sup>	--- <sup>23</sup>	\$12,377,000,000 <sup>24</sup>	\$11,446,500,000 <sup>25</sup>
Rescission <sup>26</sup>				-\$22,893,000
Final				<b>\$11,423,607,000</b>
<b>2012</b>	\$12,522,000,000 <sup>27</sup>	--- <sup>28</sup>	\$11,632,448,000 <sup>29</sup>	\$11,474,978,000 <sup>30</sup>
Rescission <sup>31</sup>				\$21,688,000
Final				<b>\$11,453,290,000</b> <sup>32</sup>
<b>2013</b>	\$11,760,000,000 <sup>33</sup>	--- <sup>34</sup>	\$11,736,044,000 <sup>35</sup>	\$11,453,290,000 <sup>36</sup>
Rescission				-\$21,394,476 <sup>37</sup>
Sequestration				-\$386,329,494 <sup>38</sup>
Final				<b>\$11,045,566,321</b> <sup>39</sup>
<b>2014</b>	<u>\$12,296,846,000</u>	--- <sup>40</sup>	\$11,697,040,000 <sup>41</sup>	<b>\$11,697,040,000</b> <sup>42</sup>
LAE	\$11,069,846,000 <sup>43</sup>			
PIAE	\$1,227,000,000 <sup>44</sup>			
<b>2015</b>	\$12,024,000,000 <sup>45</sup>	--- <sup>46</sup>	--- <sup>47</sup>	<b>\$11,805,945,000</b> <sup>48</sup>
<b>2016</b>	\$12,513,000,000 <sup>49</sup>	\$11,817,945,000 <sup>50</sup>	\$11,620,945,000 <sup>51</sup>	<b>\$12,161,945,000</b> <sup>52</sup>
<b>2017</b>	\$13,067,000,000 <sup>53</sup>			

<sup>1</sup> Includes a total of \$490,000,000 in funding designated for continuing disability reviews in FY 2007. Total consists of \$289,000,000 in base funding and \$201,000,000 in additional funds. Includes up to \$119,000,000 from user fees paid by states for Federal administration of SSI State Supplement payments. Also includes up to \$1,000,000 from fees collected pursuant to section 303(c) of the Social Security Protection Act (P.L. 108-203).

<sup>2</sup> H.R. 5647.

<sup>3</sup> S. 3708.

<sup>4</sup> Revised Continuing Appropriations Resolution, 2007 (P.L. 110-5).



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- <sup>5</sup> Includes a total of \$477,000,000 in funding designated for SSI redeterminations and continuing disability reviews (CDRs). The base and cap adjustment requests for 2008 include both CDRs and SSI redeterminations, whereas previous cap adjustment requests were for CDRs only. Total consists of \$264,000,000 in base funding and \$213,000,000 in additional funds. Includes up to \$135,000,000 from user fees paid by states for Federal administration of SSI State Supplement payments. Also includes up to \$1,000,000 from fees collected pursuant to section 303(c) of the Social Security Protection Act (P.L. 108-203).
- <sup>6</sup> H.R. 3043.
- <sup>7</sup> S. 1710.
- <sup>8</sup> Consolidated Appropriations Act, 2008 (P.L. 110-161). Includes up to \$132,641,550 from user fees paid by states for Federal administration of SSI State Supplement payments. Also includes up to \$982,530 from fees collected pursuant to section 303(c) of the Social Security Protection Act (P.L. 108-203).
- <sup>9</sup> A total of \$173,264,731 was rescinded by the Consolidated Appropriations Act, 2008 (P.L. 110-161).
- <sup>10</sup> Economic Stimulus Act (P.L. 110-185) provides funds for work related to rebate checks for Title II beneficiaries and disabled veterans.
- <sup>11</sup> Total includes \$504,000,000 in funding designated for SSI redeterminations and continuing disability reviews – \$264,000,000 in base funding and \$240,000,000 in additional funds. Includes up to \$145,000,000 from user fees paid by states for Federal administration of SSI State Supplement payments. Also includes up to \$1,000,000 from fees collected pursuant to section 303(c) of the Social Security Protection Act (P.L. 108-203).
- <sup>12</sup> The House Committee on Appropriations did not report a bill.
- <sup>13</sup> S. 3230.
- <sup>14</sup> Omnibus Appropriations Act, 2009 (P.L. 111-8). Total includes \$504,000,000 in funding designated for SSI redeterminations and continuing disability reviews – \$264,000,000 in base funding and \$240,000,000 in additional funds. After enactment of the FY 2009 appropriation, \$1,378,700 was transferred from LAE to OIG.
- <sup>15</sup> From the General Fund of the Treasury, the Medicare Improvements for Patients and Providers Act (MIPPA) (P.L. 110-275) provides \$24,800,000 for activities related to the implementation of changes to the Low-Income Subsidy program. The MIPPA total does not include \$24,100,000 for Medicare Savings Program outreach and transmittal of data to states. Also not included is the Children's Health Insurance Program Reauthorization Act (P.L. 111-3), which appropriated to SSA \$5,000,000 to provide states the option to verify citizenship or nationality for the purposes of determining Medicaid or Children's Health Insurance Program eligibility.
- <sup>16</sup> The American Recovery and Reinvestment Act (Recovery Act) (P.L. 111-5) provides SSA \$500,000,000 to process growing disability and retirement workloads, \$500,000,000 to replace the National Computer Center, and \$90,000,000 to administer the \$250 economic recovery payments for eligible Social Security and Supplemental Security Income beneficiaries.
- <sup>17</sup> Total includes \$758,000,000 in funding designated for SSI redeterminations and continuing disability reviews – \$273,000,000 in base funding and \$485,000,000 in additional funds. Includes up to \$165,000,000 from user fees paid by states for Federal administration of SSI State Supplement payments. Also includes up to \$500,000 from fees collected pursuant to section 303(c) of the Social Security Protection Act (P.L. 108-203).
- <sup>18</sup> H.R. 3293.
- <sup>19</sup> H.R. 3293, reported from Committee with an amendment.
- <sup>20</sup> Consolidated Appropriations Act, 2010 (P.L. 111-117). Total includes \$758,000,000 in funding designated for SSI redeterminations and continuing disability reviews – \$273,000,000 in base funding and \$485,000,000 in additional funds. The enacted amount matches the President's request, after accounting for a technical adjustment resulting from CBO's scoring of user fees. Total includes up to \$160,000,000 from user fees paid by states for Federal administration of SSI State Supplement payments, and \$1,000,000 from fees collected pursuant to section 303(c) of the Social Security Protection Act (P.L. 108-203).

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- <sup>21</sup> \$47,000,000 of Recovery Act Economic Recovery Payment administration funds rescinded by section 318 of P.L. 111-226.
- <sup>22</sup> Total includes \$796,000,000 in funding designated for SSI redeterminations and continuing disability reviews – \$283,000,000 in base funding and \$513,000,000 in additional funds. Includes up to \$185,000,000 from user fees paid by states for Federal administration of SSI State Supplement payments and up to \$500,000 from fees collected pursuant to section 303(c) of the Social Security Protection Act (P.L. 108-203). Includes \$1,863,280 to increase SSA’s acquisition workforce capacity and capabilities.
- <sup>23</sup> The House Committee on Appropriations did not report a bill.
- <sup>24</sup> S. 3686.
- <sup>25</sup> Department of Defense and Full-Year Continuing Appropriations Act, 2011 (P.L. 112-10).
- <sup>26</sup> A total of \$22,893,000 was rescinded by the Department of Defense and Full-Year Continuing Appropriations Act, 2011 (P.L. 112-10). The table does not display a \$200,000,000 rescission of no-year IT funds enacted in the Additional Continuing Appropriations Amendments, 2011 (P.L. 112-6) or a \$75,000,000 rescission of no-year IT funds enacted in the Department of Defense and Full-Year Continuing Appropriations Act, 2011 (P.L. 112-10).
- <sup>27</sup> Total includes \$938,000,000 in funding designated for SSI redeterminations and continuing disability reviews – \$315,000,000 in base funding and \$623,000,000 in additional funds. Includes up to \$163,000,000 from user fees paid by states for Federal administration of SSI State Supplement payments and up to \$1,000,000 from fees collected pursuant to section 303(c) of the Social Security Protection Act (P.L. 108-203). Includes \$1,863,000 to increase SSA’s acquisition workforce capacity and capabilities.
- <sup>28</sup> The House Committee on Appropriations did not report a bill. Appropriations Chairman Rehberg introduced H.R. 3070, which included \$12,041,494,000.
- <sup>29</sup> S. 1599.
- <sup>30</sup> Consolidated Appropriations Act, 2012 (P.L. 112-74). Total includes \$483,484,000 for continuing disability reviews and SSI redeterminations appropriated in the Disaster Relief Appropriations Act (P.L. 112-77).
- <sup>31</sup> A total of \$21,688,000 was rescinded by the Consolidated Appropriations Act, 2012 (P.L. 112-74).
- <sup>32</sup> The FY 2012 enacted LAE Budget Authority is \$11,453 million. However, effective April 1, 2012, Massachusetts will assume control of its State Supplementary payments reducing the estimated SSI user fees by approximately \$7.1 million. The resulting available SSI user fee funding for FY 2012 is approximately \$154 million. The available LAE funding for FY 2012 is approximately \$11,446 million.
- <sup>33</sup> Total includes \$1,024,000,000 in funding designated for SSI redeterminations and continuing disability reviews – \$273,000,000 in base funding and \$751,000,000 in additional funds. Includes up to \$170,000,000 from user fees paid by states for Federal administration of SSI State Supplement payments and up to \$1,000,000 from fees collected pursuant to section 303(c) of the Social Security Protection Act (P.L. 108-203).
- <sup>34</sup> The House Committee on Appropriations did not report a bill. The Committee posted a draft bill which included \$10,684,414,000 for LAE.
- <sup>35</sup> S. 3295.
- <sup>36</sup> At the time the Budget was formulated we had not received a full year appropriation for FY 2013. We were operating under a six month CR (P.L. 112-175) that funded agency operations at \$11,520,000,000 if annualized. This represents a 0.612 percent increase from the FY 2012 enacted level. Funding was reduced to the FY 2012 enacted level of \$11,453,290,000 under a full year CR (P.L. 113-6).
- <sup>37</sup> As per BDR 13-19, SSA was subject to an Across-the-Board (ATB) Reduction/Rescission of .2% of LAE. Both Base and Cap Program Integrity funds were exempt from this reduction.
- <sup>38</sup> Under P.L. 112-175, all non-SSI funding was reduced by 5% after sequestration was triggered by Congress.
- <sup>39</sup> Agency funding post sequestration (P.L. 112-175) and ATB reduction (BDR 13-19) was \$407,723,000 lower than the original CR funding level (P.L. 113-6).

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- <sup>40</sup> The House Committee on Appropriations did not report a bill. The LAE appropriation of \$11,697,040,000 for FY 2014 was incorporated into H.R. 3547.
- <sup>41</sup> S. 3533.
- <sup>42</sup> Consolidated Appropriations Act, 2014 (P.L. 113-76). Total includes \$1,197,000,000 for continuing disability reviews and SSI redeterminations. Includes up to \$171,000,000 from user fees paid by states for Federal administration of SSI State Supplement payments and up to \$1,000,000 from fees collected pursuant to section 303(c) of the Social Security Protection Act (P.L. 108-203).
- <sup>43</sup> Total includes \$273,000,000 in funding designated for SSI redeterminations and continuing disability reviews. Includes up to \$173,000,000 from user fees paid by states for Federal administration of SSI State Supplement payments and up to \$1,000,000 from fees collected pursuant to section 303(c) of the Social Security Protection Act (P.L. 108-203).
- <sup>44</sup> The FY 2014 President's Budget included a legislative proposal to create a new Program Integrity Administrative Expenses (PIAE) account and provide a more reliable stream of mandatory program integrity funding. The FY 2014 PIAE request was \$1,227,000,000. With the addition of \$273,000,000 requested for program integrity as part of the LAE, the total program integrity request for FY 2014 was \$1,500,000,000.
- <sup>45</sup> Total includes \$1,396,000,000 in dedicated funding designated for SSI redeterminations and continuing disability reviews – \$273,000,000 in base funding and \$1,123,000,000 in funds outside the discretionary caps as authorized by the BCA, as well as \$131,000,000 from LAE to assist in program integrity work. Includes up to \$124,000,000 from user fees paid by states for Federal administration of SSI State Supplement payments and up to \$1,000,000 from fees collected pursuant to section 303(c) of the Social Security Protection Act (P.L. 108-203).
- <sup>46</sup> The House Committee on Appropriations did not report a bill. .
- <sup>47</sup> The Senate Committee on Appropriations did not report a bill.
- <sup>48</sup> Consolidated and Further Continuing Appropriations Act, 2015 (P.L. 113-235). Total includes \$1,396,000,000 for continuing disability reviews and SSI redeterminations. Includes up to \$124,000,000 from user fees paid by states for Federal administration of SSI State Supplement payments and up to \$1,000,000 from fees collected pursuant to section 303(c) of the Social Security Protection Act (P.L. 108-203).
- <sup>49</sup> Total includes \$1,439,000,000 in dedicated funding designated for SSI redeterminations and continuing disability reviews – \$273,000,000 in base funding and \$1,166,000,000 in funds outside the discretionary caps as authorized by the BCA. Includes up to \$136,000,000 from user fees paid by states for Federal administration of SSI State Supplement payments and up to \$1,000,000 from fees collected pursuant to section 303(c) of the Social Security Protection Act (P.L. 108-203).
- <sup>50</sup> H.R. 3020.
- <sup>51</sup> S.1695.
- <sup>52</sup> Consolidated Appropriations Act, 2016 (P.L. 114-113). Total includes \$1,426,000,000 for continuing disability reviews and SSI redeterminations. Includes up to \$124,000,000 from user fees paid by states for Federal administration of SSI State Supplement payments and up to \$1,000,000 from fees collected pursuant to section 303(c) of the Social Security Protection Act (P.L. 108-203).
- <sup>53</sup> The FY 2017 request includes \$1,819 million in dedicated funding for program integrity - \$273,000,000 in base funding and \$1,546,000 in funds outside the discretionary caps as authorized by the BCA. Additionally, the LAE account carves out funding to support the fully loaded costs of performing 1.1 million CDRs and approximately 2.8 million redeterminations, \$126 million for SSI State Supplement user fees, and up to \$1 million from fees collected pursuant to section 303(c) of the Social Security Protection Act (P.L. 108-203).

## ADDITIONAL BUDGET DETAIL

### SIZE AND SCOPE OF SSA'S PROGRAMS

SSA's administrative budget is driven by the programs we administer—both in terms of the amount of work performed and the number of people needed to process it—and by our continuing efforts to improve service, stewardship and efficiency.

Between the three major programs SSA administers—OASI, DI, and SSI—Federal benefit payment outlays totaled \$931.2 billion in FY 2015; under current law, Federal benefit payment outlays are expected to increase to \$978.0 billion in FY 2016 and \$1,018 billion in FY 2017. At approximately 1.3 percent of total outlays, SSA's administrative expenses<sup>1</sup> continue to be a small fraction of overall program spending, demonstrating the agency's cost-conscious approach to managing its resources.

**Table 3.17—Federal Benefit Outlays<sup>2,3</sup>**  
(dollars in billions)

	<b>FY 2015 Actual</b>	<b>FY 2016 Estimate</b>	<b>FY 2017 Estimate</b>
Old-Age and Survivors Insurance	\$733.7	\$772.0	\$812.6
Disability Insurance	\$142.8	\$146.4	\$149.2
Supplemental Security Income	\$54.6	\$59.6	\$56.2
<b>Total Outlays</b>	<b>\$931.2</b>	<b>\$978.0</b>	<b>\$1,018.0</b>

Paralleling the growth in benefit payment outlays, the number of Federal beneficiaries of the three major programs SSA administers is expected to increase from 64.8 million in FY 2015 to 66.5 million in FY 2016 and 68.4 million in FY 2017.

<sup>1</sup> SSA's calculation of discretionary administrative expenses excludes Treasury administrative expenses which are mandatory outlays.

<sup>2</sup> Totals may not add due to rounding.

<sup>3</sup> Totals do not include payments to recipients of Special Benefits for World War II Veterans.

**Table 3.18—Beneficiaries<sup>1,2,3</sup>**  
(average in payment status, in millions)

	<b>FY 2015 Actual</b>	<b>FY 2016 Estimate</b>	<b>FY 2017 Estimate</b>
Old-Age and Survivors Insurance	48.3	50.1	51.8
Disability Insurance	10.9	10.9	11.0
Supplemental Security Income <sup>2</sup>	8.2	8.2	8.2
Concurrent Recipients <sup>4</sup>	-2.6	-2.6	-2.6
<b>Total Beneficiaries</b>	<b>64.8</b>	<b>66.5</b>	<b>68.4</b>

### FULL TIME EQUIVALENTS AND WORKYEARS

The following table summarizes the LAE Federal and State workyears requested for FY 2017.

**Table 3.19—SSA Supported Federal and State Workyears<sup>5,6</sup>**

	<b>FY 2015 Actual</b>	<b>FY 2016 Estimate</b>	<b>FY 2017 Estimate</b>
Federal Full-Time Equivalents (FTEs)	63,394	64,860	66,140
Federal Overtime/Lump Sum Leave	3,077	972	2,498
<b>Total SSA Workyears (excludes OIG)</b>	<b>66,471</b>	<b>65,832</b>	<b>68,638</b>
Total State DDS Workyears	14,925	15,270	16,000
<b>Total SSA/DDS Workyears (excludes OIG)</b>	<b>81,396</b>	<b>81,102</b>	<b>84,638</b>

### SOCIAL SECURITY ADVISORY BOARD

This budget includes \$2.5 million for the Social Security Advisory Board in FY 2017. The *Social Security Independence and Program Improvements Act of 1994* mandated the creation of a seven-member Advisory Board to make recommendations on policies and regulations relating to SSA's major programs: OASDI and SSI. The Board is required by law to meet at least four times per year. For more information about the Social Security Advisory Board, please see their website: [Social Security Advisory Board](#).

<sup>1</sup> Totals do not include recipients of Special Benefits for World War II Veterans.

<sup>2</sup> Does not include recipients who only receive a Federally Administered State supplementary payment and no Federal benefit.

<sup>3</sup> Totals may not add due to rounding.

<sup>4</sup> Recipients receiving both DI and SSI benefits.

<sup>4</sup> Recipients receiving both DI and SSI benefits.

<sup>5</sup> Includes all workyears funded by MIPPA and the Children's Health Insurance Program (CHIP) Reauthorization Act of 2009.

<sup>6</sup> Excludes workyears associated with Medicare Access and CHIP Reauthorization Act of 2015 funding.

## IT FUND TABLES

**Table 3.20— LAE Expired Balances & No-Year IT Account  
(in thousands)**

<b><u>LAE Expired Accounts</u></b>	<b><u>Amounts</u></b>
LAE unobligated balance from FY 2011-2014	\$187,400
LAE unobligated balance available from FY 2015	\$91,300
Total LAE unobligated balance from FY 2011-2015	\$278,700 <sup>1</sup>
Amounts projected for prior year adjustments	-\$128,000 <sup>22</sup>
<b>Total LAE unobligated balance available for transfer from FY 2011-2015</b>	<b>\$150,700</b>
<b>No-Year ITS Account</b>	
Carryover from funds transferred in FY 2014 for FY 2015	\$255,000
Carryover from FY 2014 (Unobligated Balances)	\$8,601
Total carryover from FY 2014 to FY 2015	\$263,601
Funds transferred in FY 2015 for FY 2015	\$205,800
Total FY 2015 no-year ITS funding available	\$469,401
FY Est. 2015 Obligations	-\$438,292
Recoveries in FY 2015	\$0
<b>Total carryover into FY 2016</b>	<b>\$31,109</b>
Funds available for transfer in FY 2016 for FY 2016	\$150,700
<b>Total FY 2016 no-year ITS funding available</b>	<b>\$181,809<sup>3</sup></b>

<sup>1</sup> Reflects adjustments to the unobligated balances for these years. Balances as of 9/30/2015.

<sup>2</sup> We believe it is essential that these funds remain in the expired LAE accounts (FY 2011-2015) to cover potential upward adjustments. Otherwise, SSA could face an anti-deficiency violation.

<sup>3</sup> \$181.8 million is available based on actual carryover, however we have only allocated \$180.3 million to date.

## ITS BUDGET AUTHORITY

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SSA's FY 2017 Information Technology Systems (ITS) budget provides resources for the acquisition and maintenance of automated data processing (ADP) and telecommunications hardware and software, as well as ADP support services and related contractual services. SSA reviews all information technology (IT) spending to ensure it includes only those projects and activities that are most crucial for the agency's operations and/or have the highest payback. No-year funding is an essential portion of the total annual IT budget.

The SSA CFO and CIO affirm that the CIO had a significant role in reviewing planned IT support for program objectives and significant increases and decreases in IT resources; and the SSA CIO and CFO affirm that the IT Portfolio includes appropriate estimates of all IT resources included in the budget request.

The table below displays ITS budget authority, split by type of funding, and obligations from FY 2015 through FY 2017.

**Table 3.21—ITS Budget by Activity<sup>1</sup>**

<b>Limitation of Administrative Expenses</b>	<b>FY 2015 Actual</b>	<b>FY 2016 Enacted</b>	<b>FY 2017 Estimate</b>
One-Year	\$867,582,552	\$720,113,900	\$1,072,609,500
No-Year	\$438,291,745	\$180,300,000	\$125,000,000
Subtotal	\$1,305,874,297	\$900,413,900	\$1,197,609,500
<b>Recovery Act (National Support Center)</b>	\$27,838,363	\$53,437,800	\$0
<b>Total</b>	\$1,333,712,660	\$953, 851,200	\$1,197,609,500

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<sup>1</sup> Includes base and cap Program Integrity. Excludes Reimbursable Authority. One-year funds include regular one-year, base CDRs, and additional CDRs.

Below are some of our significant accomplishments during FY 2015:

- **Annual Benefit Change and Annual Benefit Statements (COLA and BRI):** On November 21, 2014, the agency implemented Cost of Living Adjustment (COLA) Adjustment and Medicare premium rate changes, and generated Annual Benefit Statements (SSA-1099) for beneficiaries' tax purposes. These changes are made annually and in FY 2015, the 1.7% COLA change alone involved over 58 million accounts.
- **Notices and Special Notice Option (SNO):** Beginning in November 2014, all SSA produced Medicare notices deemed in scope of the *American Council of the Blind v. Astrue* court decision are now available to claimants in different SNO formats. The notices offered are:
  - Target Notice Architecture Automated Notices (TNA) create automated personalized notices for the public in a format similar to MS Word, with customized mainframe fonts for bolding, underlining, special characters and character height. The notice application programs provide the text and fill-in data to TNA's processes in a consistent format. In addition to supplying the notice content, the application programs pass the language of preference to TNA. Most TNA notices are available in both English and Spanish.
  - Central Image Print Architecture Notices (CIPA) enable the personnel in the Office of Disability Adjudication and Review (ODAR) Hearings Offices to send a variety of notice types through an automated print process.
  - AURORA PSC Notices uses a manual notice system that creates and completes Title II notices for the Program Service Centers (PSC) that could not be completed in an automated fashion by batch processing operations.
  - NOTICE.DLL Notices allow the submission of notices in MS Word format to a VSAM file and then subsequently upload and store the notice in ORS (the Online Retrieval System).
  - Document Processing System Notices (DPS) is a manual notice system and a web-based intranet application. Field Offices, Teleservice Centers and some units in Program Service Centers utilize National, Regional and Local templates and UTIs (Universal Text Identifier) to create custom notices to claimants and beneficiaries.
  - Public Information Request System (PIRS) pamphlets utilize a web-based intranet application that provides SSA field office (FO) employees with user-friendly screens for entering requests from the public for SSA's forms and pamphlets.
  - Special Notice Options (SNO) provide formats that are accessible to the blind or visually impaired in a manner other than first-class print mail.
  - Record Specifications (RecSpec) are notices SSA sends only in data streams to a print vendor/SNO vendor. The vendor then disburses the data to the locations specified on the SSA notices.



For fiscal year 2015, this budget supported the printing of over 136 million notices. Included is a summary of the notice counts:

<b>System / Type</b>	<b>FY 2015 Notice Totals</b>
TNA Automated Notices	117,769,859
CIPA Notices	6,503,908
AURORA PSC Notices	2,194,682
NOTICE.DLL Notices	1,272,179
DPS Notices	6,596,685
PIRS Pamphlets	782,208
SNO Notices:	863,680 (total)
Braille	28,112
Data CD	25,525
Audio CD	35,227
Large Print	774,816
RecSpec Notices:	228,560 (total)
Braille	11,617
Data CD	16,852
Audio CD	12,413
Large Print	187,678
<b>Total:</b>	<b>136,211,761</b>

- **Public Facing Integrity Review (PFIR):** On 11/01/14, released Public Facing Integrity Review (PFIR) Release 2.1 into production. This release provided a new web front end for PFIR users who are reviewing and managing cases. Seven (7) new criteria sets were implemented to aid in detecting potential fraud in the Electronic Access process. Existing criteria for My Direct Deposit internet transactions were enhanced. PFIR supports the agency's ability to deter, detect, and investigate instances of internet fraud and abuse.
- **B Stop Fraud Indicator:** Implemented the B-Stop Fraud Identifier. This project developed a fraud indicator that enables SSA to classify alleged Electronic Funds Transfer (EFT) fraud cases via the existing B Stop non-receipt process. This indicator provides the Bureau of Fiscal Service (BFS) with a way to distinguish and prioritize the alleged fraud cases from other non-receipt cases. In addition, for the "B-Stop" Fraud Identifier project, the Payment History (PHUS) Query was updated to display this new fraud indicator.
- **Records Management System for Media Neutral Claims 2:** In compliance with National Archives and Records Administration (NARA) requirements and agency record retention schedules, DCS successfully implemented their destruction software for three systems, Modernized Integrated Disability Adjudicative System (MIDAS), Case Processing Management System (CPMS), and Case Processing Management System Management Information CPMS MI). The agency changed its claims file disposition strategy in May 2015 to simplify the disposition rules and implement big bucket scheduling using simplified categories. Under the new strategy, these systems will implement their destruction software under their projects. This multi-component effort aligns with the National Archives and Records Administration (NARA) General Records Schedule 20 rule 2B.
- **Automated Publishing of Public Information (APPI):** In October 2015, the APPI project was implemented in production. This project provides an automated mechanism whereby SSA-approved data for public consumption is automatically published on SSA.gov, and is accessible via Data.gov. The APPI project continues the Agency's efforts to comply with the President's Open Government Directive as outlined in SSA's 2010 Open Government Plan, which stipulates the agency's goals and objectives to increase openness in its programs and operations. SSA is committed to increasing transparency through information sharing and accountability.
- **Electronic Records Express (ERE):** Effective May 2015, this redesigned project provided a consistent user experience. It reduced the cost of burning and mailing CDs to the Appointed Representatives community and implemented functionality supporting the Digital Recording Acquisition Project (DRAP). This effort also improved support for Management Information (MI) processing and reporting. It allows us to process additional document types for Disability Determination Services (DDS).
- **Legal Automated Workflow System (LAWS):** In March 2015, we released a modernized matter (case) management system that provides an automated electronic workflow for the Office of the General Counsel (OGC). This functionality allows OGC

to share and transfer its workloads between offices and gives them the ability to integrate with agency systems including Appeals Review Processing System (ARPS), Claims File Record Management System (CFRMS), the electronic folder, and Document Management Architecture (DMA). Additionally, in June another release allowed processing without updating the notice of suit date in the Appeals Review Processing System (ARPS).

- **Electronic Bench Book (eBB):** In April, we released eBB 5.0, allowing a printable summary of case information (Case Information Summary) to be used by an Administrative Law Judge (ALJ) during a hearing. Changes were also implemented to support Internet Explorer 11.
- **Annual Wage Reporting and AccuWage TY14:** On 10/24/2014, we released a new version of AccuWage 2014 into production. This release incorporated options allowing users to test both W-2 (Initial) and W-2C (Correction) submissions through one unified interface. AccuWage is a downloadable SSA application that is used by employers and submitters of wage reports to check the file against the specifications for electronically filing forms W2 and W2c. This enhancement will aid in increasing the accuracy of wage files being sent to the agency. On 01/10/2015, we implemented the major architectural release of the multi-year Annual Wage Reporting (AWR) Redesign into production. This release included software to increase processing capability to 100 million W-2s per week and up to 20 million W-2's per day. Core earnings processes written in COBOL (Common Business Oriented Language) were redesigned and replaced with newer technology.
- **Social Security Online Accounting and Reporting System (SSOARS):** On 10/03/2015, we provided an eWork release that supports Benefit Offset National Demonstration (BOND) beneficiaries' transition into normal Work Continuing Disability Review (W-CDR) rules without the need for a final closing Work Review. This release adds new fraud language to notices SSA-3033, SSA-2708, and L725. Corrections were made for a defect that looks up the office address of beneficiaries who have a foreign address.
- **Human Resources Services Portal:** On 11/22/2014, we implemented Human Resources Portal Release 2.0 into production. This release included the implementation of the Minority Serving Institutions Reporting System (MSIRS), which is the first application within the HR Portal. MSIRS is a web-based application used for tracking agency contributions to organizations including colleges and universities. The data collected in MSIRS will generate the agency's Minority Serving Institutions Report. In addition, the HR Portal release included additional hyperlinks related to Human Resources websites.
- **iAppeals Revitalization and Attachment Utility:** We successfully implemented a release on March 14, 2015 to revise and improve the language throughout the iAppeals application. This release provided a look and feel similar to newer eService applications. It revised the introductory pages and consolidated information, providing a central location for navigation instructions and requirements to complete the iAppeal. It also included the development of a new checklist and tutorial video.

The Attachment Utility was successfully implemented on March 14, 2015. This release developed an attachment allowing users to upload supporting documents and house them in a repository. Additionally, Claims Representatives (CR) will be notified of documents pending in the repository they can send to the electronic folder, print, or print and delete. The CR will also be able to change the document type. The attachment utility should be reusable with other Internet Disability Reports (IDR).

- Dynamic Help - Customer Engagement Tools:** On August 1, 2015 we implemented Dynamic Help which provides a context-aware help application (contact SSA menu) for facilitating mySSA user interactions with agency staff over multiple online communication channels while visiting SSA.gov or using an SSA online application. The first iteration will offer Web Callback and may be limited to authenticated [my Social Security](#) users.
- Web Callback – Customer Engagement Tools:** This Agile development project was successfully implemented on September 19, 2015. Web Callback provides architecture and screen(s) to support a web feature that allows [my Social Security](#) user requests for return phone calls from agency technicians. Users can access this tool through the Dynamic Help Menu application interface.
- MySSA Internet 1099/1042S Application (1099):** - To improve the Social Security Benefit Statement (SSA-1099-R/SSA-1042S) process, SSA implemented a new web application that allows immediate online viewing, printing, saving, mailing and downloading of the 1099 and 1042S through the [my Social Security](#) portal. Effective January 31, 2015, the Internet 1099/1042S application was migrated to operate behind eAccess and within the [my Social Security](#) portal. This improvement resulted in improved service to beneficiaries, reduced cost to the agency for mailings, and reduced workloads for operational personnel.
- Machine-Readable Downloadable Social Security Statement:** This project was successfully implemented on July 25, 2015, releasing code to create a machine-readable, downloadable Social Security (SS) Statement that the public can access. It is housed on the [my Social Security](#) portal. The statement contains the same information in the current statement (estimated benefits, earnings history, etc.), but is in a format that is easily read by software applications.
- MySSA Internet Replacement Card (iMRC):** We successfully implemented iMRC in May 2015. The key objective of this release was placement of the existing Internet Medicare Replacement Card (IMRC) functionality within the [my Social Security](#) portal. It entailed application screen changes, Management Information (MI) report changes, and added Google Analytics functionality. This release will allow Medicare beneficiaries to request a Medicare Replacement Card via their [my Social Security](#) portal account. The beneficiary will receive the card by mail. Placing IMRC within the [my Social Security](#) portal supports the Agency Priority Goal to increase the number of MySSA registrations.

- **Title II Treasury Report on Receivables Rel 2:** In September 2015, we implemented the Treasury Report on Receivables Phase II (TROR II) project for FY 2015. The TROR report will replace the existing Aging Report and automatically generate data for Title II Accounts Receivables balances. DCBFQM will use the TROR report to supply data to the Department of Treasury on T2 overpayments. This project will help meet some of the legislative requirements outlined in the DATA Act of 2014.
- **Terminate T2 Beneficiaries Age 115 in Long-Term Suspense-Phase 2:** In September 2015, we released software for Phase 2, which reduces opportunities to commit fraud by resuming and redirecting benefits on suspended claims through automation for beneficiaries that do not have a date of death reported on the Master Beneficiary Record (MBR) and there are no additional beneficiaries in non-terminated payment status on the MBR. Phase 2 also supports the recommendation set forth in the Office of the Inspector General (OIG) audit A-09-09-29111 titled, “Aged Beneficiaries Whose Benefits Have Been Suspended for Address or Whereabouts Unknown.” This project is automating monthly identification, selection and processing of Title II Master Beneficiary Records (MBR) with long-term benefit suspensions (seven years or more) for address or whereabouts unknown. In addition, the beneficiary must be age 115 or older. The nightly batch processes will manage the selected records. These processes will change the suspension status (S) to a termination status (T9) with a reason for termination of “AgeTRM”.
- **International Payments -68 South Korea and Indonesia:** On 05/15/2015, we successfully implemented International Payments for South Korea and Indonesia by adding Routing and Transmittal Number (RTN) 68 to the Daily Update Master Accounting System (DUMAS). This enhancement provided International Direct Deposit (IDD) to beneficiaries in all countries utilizing RTN ‘68’ -- including South Korea and Indonesia.
- **Rep Payee System Redesign Enhancements:** On 09/12/2015, we successfully implemented an override option that allows technicians to post full or partial repayment of misused funds during the 45-day period after release of the Advance Notification for Repayment of the Misused Funds. On 09/30/2015, we successfully improved Electronic Representative Payee Accounting (eRPA) search/display functionality and eRPA management information (MI) to allow users to access all pending records to allow for timely case processing and better fraud detection and prevention.
- **Ticket Operations Provider Support System (iTOPSS):** On 01/17/2015, a new Web application for iTOPSS was implemented. The Employer Network (EN) Portal was updated to request payments, view payments already made, and it added a beneficiary earnings display. We utilize the Global Functions Web application allows the system to assign a ticket and open a Vocational Rehabilitation (VR) case. Among database changes to accommodate new functionality, the new Ticket Rate has been added to the application. On 02/28/2015, the Employer Networks (EN)s were given the capability to use the Portal to update Timely Progress Review (TPR), check which beneficiaries are

assigned to them, request payments, assign and unassign tickets. This release is another milestone in agency's migration from the MaxStar system.

- **Ensuring Release of Withheld Benefits:** In September 2015, we successfully completed the release of a new MI system. The system captures and stores detailed information on Title 2 transactions that could lead to a beneficiary being entitled to retroactive benefits (back pay). For the release, several new software modules and new database tables were created to capture and store the back pay transactions. By implementing the Management Information System for Ensuring the Release of Withheld benefits, Field Office and Processing Service Center management will be able to better manage this workload and ensure and improve the timely payment of Social Security retroactive benefits. On 09/23/2015, we implemented enhancements to support Representative Payee control and tracking and several new Regular Transcript Attainment and Selection (RETAP) alerts were successfully moved into production. New Management Information (MI) was provided via the Management Information Services Facility (MISF), which allows updated tracking reports to include cases processed by the Office of International Operations (OIO). As a result of the release, OIO is provided with data categorized by the regional Federal Benefit Officer's (RFBO) region and reporting Federal Benefit Units (FBUs)."
- **Social Security Electronic Remittance System (SERS):** In December 2014, the national rollout of SERS Release 1.0 was completed. SERS provides field offices with an automated solution to collect, track, record and report fees collected for providing various non-programmatic services to individuals and third parties. The fee for services is paid by check or credit card and is passed in real time to the Social Security Online Accounting and Reporting System (SSOARS). Credit card information is processed in an encrypted manner without storing any credit card information in any SSA system. SERS replaces manual business processes and promotes standardized electronic business practices and fee collection procedures in field offices by providing a streamlined remittance process and an automated system solution to collect fees for services. SERS addresses the agency's vision to eliminate cash transactions, use card swipe and check scanner technology, and adopt processes that are prevalent throughout the banking and retail sectors. In addition, SERS sufficiently addresses OIG audit recommendations and complies with the requirements of OMB Circular A-25, pertaining to user charges.
- **Certificate of Coverage (COC)/WebCOC:** In December 2014, changes were implemented to the COC and WebCOC application to support the addition of the Slovak Republic. These certificates are legal documents which exempt U.S. employees from paying foreign Social Security taxes when temporarily working overseas. Each determination involves research on country- specific provisions of the Totalization agreements.
- **Health Information Technology (HIT) Release 11.0:** SSA's Health IT provides health care organizations the ability to share medical information with us electronically. It streamlines the disability determination process by allowing us to request and obtain medical records electronically, and it enables computerized decision support. HIT has demonstrated the potential to increase efficiencies in the disability program and

dramatically improve service to the public. During the 1st quarter of FY2015, we provided a combination of software releases and partner expansion to further the HIT initiative. The following sites went into the production environment:

10/01/2014 - University of Iowa  
 10/10/2014 - Presbyterian HealthCare – New Mexico  
 10/24/2014 - Carilion Clinic - Virginia  
 11/10/2014 - Sentara Healthcare – Virginia and North Carolina  
 12/01/2014 - Memorial Care - California  
 12/18/2014 – Martin Health – Florida  
 12/19/2014 – Legacy Health – Oregon and Washington

Using the Medical Evidence Gathering and Analysis through Health IT (MEGAHIT) application allows SSA to request, receive, and analyze electronic medical records in a fully automated manner, resulting in faster decisions on disability claims. During the 1st quarter of FY 2015, DCS provided a combination of software releases and partner expansion to further the HIT initiative. The following sites went into the production environment:

01/29/2015 - Mercy Health  
 02/17/2015 - Essentia Health  
 03/11/2015 - Oregon Health & Science SSM Health.

During the 3rd quarter of FY2015 , we again provided a combination of software releases and partner expansion to further the Health Information Technology (HIT) initiative. The following sites went into the production environment: 04/09/2015 - Stanford Hospital and Clinics; 05/04/2015 - Cedars-Sinai Health System Legacy Health. On 05/02/2015, HIT successfully implemented software release 10.2 into their production environment. This release makes Document Conversion Enterprise (DCE) the default document conversion mechanism. It includes changes to support the removal of Windows 2003 servers as required by the Office of Telecommunications and Systems Operations (OTSO).

- **Affordable Care Act (ACA) Release 3.0:** In October 2014, we successfully implemented and modified operational procedures necessary to allow mainframe architecture to be available 24 x 7 for the Affordable Care Act (ACA) application. The implementation of the 24 x 7 mainframe architecture will improve the availability of the verification portion of the ACA application by 25% compared to FY2014. On 11/1/2014, we implemented a release of the Affordable Care Act (ACA)-High Availability Project into production. This release established a new web service process between the Centers for Medicare and Medicaid Services (CMS) and the Social Security Administration (SSA) location in Durham, NC. The web service is used by CMS to receive SSN verifications, citizenship data, death data, and incarceration data at the SSA Durham Location, when the SSA Baltimore, Maryland facility is unavailable. CMS will use this data during the eligibility and enrollment to help determine if an individual qualifies for programs and benefits such as Advanced Premium Tax Credits, Cost Sharing Reductions, Medicaid, Children’s Health Insurance Program, and Basic Health

Plans. On 11/15/2014, the agency successfully processed ACA transactions at both the Baltimore and Durham data centers, around the clock without issue. This improved availability allows CMS to continue the ACA application process without interruption.

- **Providing Current Prisoner Information to Do Not Pay (DNP):** On 02/11/2015, SSA successfully transferred a Do Not Pay (DNP) “Gap” file to the Treasury’s Bureau of Fiscal Service (BFS). The Gap file contained an extraction of prisoner data from the Prisoner Update Processing System (PUPS) from 9/23/2014 through 2/6/2015 and contained 771,609 records. The agency previously sent an initial transfer of prisoner data to BFS on 9/24/2014.

Below is a list of our agency portfolios and their vision statements:

- **Administrative and Mission Support:** The Administrative and Missions Support portfolio aims to develop IT capabilities that support and enable core business functions across the agency. The investments in the Administrative and Missions Support portfolio will improve our responsiveness to the American public through enhancing our services and programs, modernizing our information technology, and building a model workforce.
- **Core Services:** The Core Services Portfolio will provide Innovative Quality Service to the public, Strengthen the Integrity of Our Programs, and Partner with Other Agencies and Organizations to Improve the Customer’s Experience and Align with the Administration’s One-Government Approach. We will transform the way we deliver service to the public and Enhance the Customer’s Experience by striving to Complete the Customer’s Business at the First Point of Contact. Core Services Portfolio investments will enhance and execute plans to modernize our legacy systems and streamline workloads for our frontline employees, maintain system performance, and Continuously Strengthen our Cyber Security Program and IT services.
- **Disability and Appeals:** The Disability and Appeals Process portfolio promotes efficient and effective IT systems that increase the quality, timeliness and consistency of disability decisions and services. These systems will facilitate the accurate collection, processing, and flow, of data and information that will allow our employees to provide quality service to disabled applicants and beneficiaries. The portfolio will help ensure we make the correct disability decision at the correct time, and apply disability policy and procedures consistently across all adjudicative levels.
- **IT Infrastructure:** The Infrastructure Portfolio provides us with the information technology stability and flexibility that we need in order to meet and sustain current operational requirements, adapt to changes in business operations, and plan for future growth and demand in our workloads.

Our reliance on information technology and electronic data continues to increase with each new workload and each new service delivery channel. The portfolio seeks to address the rising demands on our infrastructure by not only continuing to deliver high levels of end-to-end availability, stability, security and performance but also by instituting new and/or enhanced technologies to remain current with industry standards.



Through anticipation of the technology demands of our strategic objectives and investments, the portfolio strives to ensure a ready environment with each application delivery as well as improvements and enhancements to application portfolios.

- **IT Program Integrity:** The Program Integrity Portfolio supports SSA's goals to strengthen the integrity of the Social Security programs, deliver innovative quality services, and ensure reliable, secure and efficient Information Technology (IT) services. We seek to continually improve our comprehensive quality review and financial management programs in accordance with all laws and regulations. This includes accurately and timely paying benefits to our recipients and beneficiaries, detecting and preventing fraud wherever it may occur, and minimizing improper payments.

In January 2015, SSA introduced a chief technology officer to lead SSA's technology change, and balance change with service delivery reliability.

The agency currently manages 14 major OMB 300 exhibits. They are:

- Customer Engagement Tools (CET)
- Disability Case Processing System (DCPS)
- DDS Automation (DDSA)
- Earnings Redesign
- Electronic Services
- Financial Accounting System (FACTS)
- Infrastructure Operations and Maintenance (O&M)
- Infrastructure Modernization
- Intelligent Disability (iDib)
- IT Modernization
- National Support Center (NSC)
- Smart Claims
- SSI Modernization
- Title II

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**INFORMATION TECHNOLOGY COSTS BY TYPE**


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The following table satisfies SSA's requirement directed by the House Report.

**Table 3.22 — FY 2015 Information Technology Costs  
(Actual dollars)**

<b>ITS</b>	<b>Costs</b>
Maintenance & Lease	\$317,600,780
Contractor Support	\$503,997,154
Inter Agency Agreements	\$12,869,077
Software	\$44,656,327
Hardware	\$217,757,074
Telecommunications	\$244,532,887
<b>Total<sup>1</sup></b>	<b>\$1,341,413,299</b>

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**DIGITAL SERVICES TEAM**


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SSA is working with OMB to provide exceptional digital services. The success rate of government digital services improves when agencies have digital service experts on staff with modern design, software engineering, and product management skills. To ensure the agency can effectively build and deliver important digital services, the Budget includes \$5,500,000 for staffing costs to build a Digital Service team that will focus on transforming the agency's digital services with the greatest impact to citizens and businesses so they are easier to use and more cost-effective to build and maintain.

These digital service experts will bring private sector best practices into the disciplines of design, software engineering, and product management to maximize the agency's most important services. The positions will be term-limited, to encourage a continuous influx of up-to-date design and technology skills to the agency. The digital service experts will be recruited from among America's leading technology enterprises and startups, and will join with the agency's top technical and policy leaders to deliver meaningful and lasting improvements to the services the agency provides to citizens and businesses.

This digital service team will build on the success of the United States Digital Service team inside of OMB, created in 2014. Since launching, this small OMB team has collaborated with Federal agencies to implement cutting edge digital and technology practices on the nation's highest impact programs.

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<sup>1</sup> Does not include personnel costs.

### SSA E-GOV CONTRIBUTIONS

SSA supports many E-Government initiatives. These initiatives serve citizens, businesses, and Federal employees by delivering high-quality services more efficiently and by providing services that might not otherwise be available. These initiatives are included in the agency's IT budget.

**Table 3.23 – SSA E-Gov Contributions (in thousands)<sup>1</sup>**

	<b>FY 2015 Actuals</b>	<b>FY 2016 Estimate</b>	<b>FY2017 Estimate</b>
Disaster Assistance Improvement Plan	\$56	\$56	\$56
E-Federal Health Architecture LoB	\$100	\$100	\$100
E-Rulemaking	\$17	\$24	\$34
Financial Management LoB	\$67	\$67	\$67
Geospatial LoB	\$25	\$25	\$25
GovBenefits.gov	\$209	\$381	\$378
Grants.gov	\$27	\$26	\$25
Grants Management LoB	\$345	\$353	\$400
Human Resources Management LoB	\$130	\$130	\$130
Integrated Acquisition Environment (IAE)	\$104	\$104	\$857
Budget Formulation LoB	\$55	\$55	\$55
<b>Total</b>	<b>\$1,135</b>	<b>\$1,321</b>	<b>\$2,127</b>

Social Security remains an active participant to the following E-Government initiatives:

**Disaster Assistance Improvement Plan** provides a unified point of access to disaster management-related information, mitigation, response, and recovery information.

**E-Federal Health Architecture Line of Business (LoB)** supports integration of the agency's health information systems into the emerging Nationwide Health Information Network (NHIN).

**E-Rulemaking** improves collaboration across government on regulatory matters and provides a central web-based environment for the public to review and comment on SSA regulatory actions while reducing administration costs.

**Financial Management LoB** reduces non-compliant systems by leveraging common standards and shared service solutions in Federal financial operations.

**Geospatial LoB** maximizes geospatial investments by leveraging resources and reducing redundancies. Offering a single point of access to map related data will allow SSA to improve mission delivery and increase service to citizens.

<sup>1</sup> In FY 2015 and FY 2016, funds were paid from LAE. In FY 2017, funds are paid in the IT budget.

**GovBenefits.gov** helps to promote awareness of SSA's benefit programs to the public, assisting SSA in its strategic goals of delivering citizen-centric world-class service and strengthening public understanding of Social Security programs.

**Grants.gov** provides a single, online portal and central storehouse of information on grant programs for all Federal grant applicants.

**Grants Management LoB** is developing solutions to standardize and streamline the grants management process government-wide. Grants Management LoB is pursuing a consortia based approach to share operations and maintenance costs, and development, modernization, and enhancement costs across agencies, decreasing the burden that any one grant-making agency must bear. Business processes, as available through consortium lead agencies, will decrease agency reliance on manual and paper-based grants processing.

**Human Resources Management LoB** provides common core functionality to support the strategic management of Human Capital government-wide.

**Integrated Acquisition Environment and IAE - Loans and Grants** create a secure environment to facilitate the acquisition of goods and services.

**Budget Formulation LoB** supports the Federal Government's effort to improve agency budgeting through collaboration and information sharing.

**Table 3.24 – Other SSA Expenses/Service Fees Related to E-Gov Projects (in thousands)**

	<b>FY 2015</b>	<b>FY 2016</b>	<b>FY 2017</b>
	<b>Actual</b>	<b>Estimate</b>	<b>Estimate</b>
Recruitment One-Stop	\$368.2	\$368.0	\$406.0
Enhanced Human Resource Integration	\$1,022.3	\$1,074.1	\$1,127.7
E-Payroll	\$16,510.1	\$16,727.2	\$16,867.1
E-Travel	\$772.2	\$850.0	\$850.0
<b>Total</b>	<b>\$18,672.8</b>	<b>\$19,019.3</b>	<b>\$19,250.8</b>

In addition to making annual contributions to the managing partners of certain E-Gov projects, SSA also funds various ongoing business services that are related to E-Gov projects. These funds are part of SSA's ongoing budget and pay for services provided by other agencies under authority of the Economy Act.

**Recruitment One-Stop** provides an online portal ([USAJobs](#)) through which citizens can easily search for employment opportunities throughout the Federal Government.

**Enhanced Human Resource Integration** initiative develops policies and tools to streamline and automate the electronic exchange of standardized human resource data needed for the creation of an official employee record across the Executive Branch.

**E-Payroll** standardizes and consolidates government wide Federal civilian payroll services and processes.

**E-Travel** provides a government wide standard set of world-class travel management services to consolidate Federal travel, minimize cost, and improve customer satisfaction.

## CYBERSECURITY

To address cyber threats, we collaborate with the White House National Security staff, the Federal Chief Information Officer, the Department of Homeland Security's (DHS) United States Computer Emergency Response Team, and various law enforcement agencies.

**Table 3.25 – Cybersecurity Costs (in millions)<sup>1</sup>**

	<b>FY 2017</b>
Detect, Analyze and Mitigate Intrusions	\$21.4
Protecting Networks and Information	\$41.9
Continuous Monitoring	\$22.7
Shaping the Cyber Environment	\$0.9
<b>Total</b>	<b>\$86.9</b>

Our cybersecurity program continues to evolve our detection, protection, and intelligence capabilities for strengthening the agency's defenses against evolving threats and cyber-attacks. Our program incorporates these security capabilities into a comprehensive, multi-layered defensive approach for ensuring the privacy of the American public and proper issuance of nearly a trillion dollars in benefits. For FY 2017, our cybersecurity program plans to focus on the following key areas.

1. **Detect, Analyze, and Mitigate intrusions** – For FY 2017, our budget is focused on improving our incident detection capabilities through the detection, analysis, and mitigation of risky user behavior.
  - **User Behavior Analysis Solution** – In FY 2017, SSA plans to evaluate and procure a User Behavior Analysis (UBA) solution that will improve the agency's ability to detect threats to SSA's network based on suspicious behavior. UBA solution determines risk behavior by analyzing information in several log repositories that regularly monitor computer, user, and network activities. UBA solution will assist the agency with detecting threats such as unusual network activities, and unauthorized user access activities. Finally, the UBA solution will assist the agency by assessing the risk associated with each detected anomalous behavior. UBA solution will accomplish this by providing customized risk scoring and risk thresholds in detected activity.

<sup>1</sup> Does not include non-IT cybersecurity related costs.

2. **Protecting Networks and Information** – For FY 2017, our agency continues to invest in protection of our networks and information through the enhancement of our agency’s internal network access control capabilities.
  - **Network Access Control (NAC)** – In FY 2017, SSA plans to further its internal network protection capabilities for detecting and protecting against unauthorized network devices, and strengthening agency devices by enforcing security compliance to existing agency standards. SSA plans to leverage funding through Department of Homeland Security (DHS) funding for continuous monitoring program development, but our agency plans to prioritize the development of network protections to meet our unique business needs.
3. **Continuous Monitoring** – Our agency continues to mature its continuous monitoring program capabilities by focusing on endpoint security for 2017.
  - **Desired State Software Solution** – In FY 2017, SSA plans to procure a desired state software solution for ensuring the integrity of our endpoints. The desired state solution will actively prevent against threats such as malicious software (e.g. viruses, worms, etc.), and from malicious and improper configuration changes. This desired state solution should actively prevent unauthorized software from installing or executing, and rollback any unauthorized security configuration changes.
4. **Shaping the Cybersecurity environment** – Our agency seeks to strengthen its own cybersecurity workforce by improving access to quality cybersecurity training.
  - **Cyber Training Academy Program – Cyber Academy** – In a continuing effort to evolve the agency’s Information Security Training Program, SSA plans to establish a Cyber Academy designed to meet the training needs of our diverse cybersecurity workforce. The Cyber Academy seeks to provide a broad curriculum of abilities, allowing them to fulfill their required security functions. In addition to enhancing specialized role-based security training for individuals with significant information security responsibilities, the Cyber Academy will provide a better alignment of security training courses with individual’s roles, consistent cybersecurity training throughout the agency, and ensure we support current Federal laws, policies and regulations.

## EMPLOYMENT

The following table provides a detailed view of the full-time equivalent employment levels.

**Table 3.26—Detail of Full-Time Equivalent Employment<sup>1,2</sup>**

	<b>FY 2015 Actual</b>	<b>FY 2016 Estimate</b>	<b>FY 2017 Estimate</b>
Limitation on Administrative Expenses Accounts	63,170	64,560	64,840
Reimbursable Work	224	300	300
	<b>63,394</b>	<b>64,860</b>	<b>66,140</b>

The following table lists the Average Grade and Salary for SSA employees for FY 2015. It includes averages for Executive Service (ES) and General Service (GS) employees.

**Table 3.27—Average Grade and Salary**

	<b>FY 2015 Actual</b>
Average ES Salary	<b>\$172,300</b>
Average GS/WG Grade	<b>11</b>
Average GS/WG Salary	<b>\$69,400</b>

<sup>1</sup> Includes all workyears funded by MIPPA and the Children's Health Insurance Program (CHIP) Reauthorization Act of 2009.

<sup>2</sup> Excludes workyears associated with Medicare Access and CHIP Reauthorization Act of 2015 funding.

The following table satisfies SSA's requirement directed by the House Report.

**Table 3.28 — FY 2015 Personnel Costs by Grade  
(Actual dollars – Table Continues on Next Page)**

<b>General Schedule (GS) Grade</b>	<b>Salaries</b>	<b>Benefits</b>	<b>Total</b>
GS – 1	\$54,865	\$6,171	\$61,036
GS – 2	\$200,828	\$48,209	\$249,037
GS – 3	\$892,208	\$211,359	\$1,103,567
GS – 4	\$10,193,278	\$3,231,083	\$13,424,362
GS – 5	\$114,857,461	\$36,801,767	\$151,659,228
GS – 6	\$88,363,250	\$28,915,018	\$117,278,268
GS – 7	\$171,713,244	\$55,670,791	\$227,384,035
GS – 8	\$507,098,815	\$177,746,920	\$684,845,735
GS – 9	\$318,079,680	\$102,174,938	\$420,254,618
GS – 10	\$31,486,157	\$9,089,048	\$40,575,205
GS – 11	\$1,196,574,979	\$384,972,165	\$1,581,547,143
GS – 12	\$1,055,771,146	\$315,315,140	\$1,371,086,287
GS – 13	\$752,503,392	\$223,406,915	\$975,910,307
GS – 14	\$344,780,854	\$97,887,417	\$442,668,272
GS – 15	\$109,122,817	\$28,851,212	\$137,974,029
<b>Subtotal GS Grades<sup>1</sup></b>	<b>\$4,701,692,976</b>	<b>\$1,464,328,153</b>	<b>\$6,166,021,129</b>
<b>Administrative Law Judge (ALJ)</b>	<b>\$232,875,700</b>	<b>\$63,610,135</b>	<b>\$296,485,835</b>
<b>Senior Executive Services (SES)</b>	<b>\$25,578,455</b>	<b>\$5,879,339</b>	<b>\$31,457,794</b>
<b>Grand Total<sup>2</sup></b>	<b>\$4,960,147,131</b>	<b>\$1,533,817,627</b>	<b>\$6,493,964,757</b>

<sup>1</sup> Includes \$48,213,193 for Reemployed Annuitant (RA) Personnel Costs.

<sup>2</sup> Does not include all payroll costs. Only includes GS Grades (including RAs), ALJs, and SES personnel costs requested in the report language.



**Table 3.29—Historical Staff-On-Duty by Major SSA Component<sup>1</sup>**

	<b>FY 2014 Actual</b>	<b>FY 2015 Actual</b>
Field Offices	29,682	29,400
Teleservice Centers	4,535	4,604
Processing Centers	10,674	10,521
Regional Offices	1,797	1,853
<b>Operations Subtotal<sup>1</sup></b>	<b>46,688</b>	<b>46,378</b>
Office of Disability Adjudication and Review	10,473	11,032
Systems	3,177	3,197
Headquarters <sup>2</sup>	4,764	5,089
<b>SSA Total</b>	<b>65,102</b>	<b>65,696</b>

The following table satisfies SSA's requirement directed by the House Report.

**Table 3.30 — FY 2015 Personnel Costs by Region  
(Actual dollars)**

<b>Regions</b>	<b>Salaries</b>	<b>Benefits</b>	<b>Total</b>
Boston	\$161,911,411	\$50,157,666	\$212,069,077
New York	\$405,118,301	\$118,946,045	\$524,064,346
Philadelphia	\$470,256,210	\$145,397,961	\$615,654,171
Atlanta	\$797,700,116	\$257,084,761	\$1,054,784,877
Chicago	\$592,478,176	\$184,229,422	\$776,707,598
Dallas	\$427,743,457	\$141,023,761	\$568,767,217
Kansas City	\$235,379,130	\$76,383,728	\$311,762,858
Denver	\$92,201,634	\$29,722,486	\$121,924,120
San Francisco	\$569,974,312	\$177,595,803	\$747,570,114
Seattle	\$155,368,013	\$49,687,732	\$205,055,746
Headquarters	\$1,052,016,371	\$303,588,262	\$1,355,604,632
<b>Total<sup>3</sup></b>	<b>\$4,960,147,131</b>	<b>\$1,533,817,627</b>	<b>\$6,493,964,757</b>

<sup>1</sup> Includes full time, part time, and temporary employees.

<sup>2</sup> Headquarters includes counts for Operations Support Staff, Disability Case Processing System, Office of Appellate Operations, GSA Delegations, and the Social Security Advisory Board.

<sup>3</sup> Does not include all payroll costs. Only includes GS Grades (including RAs), ALJs, and SES personnel costs requested in the report language.

## PHYSICIANS' COMPARABILITY ALLOWANCE

Physicians' Comparability Allowance (PCA) permits agencies to provide allowances to certain eligible Federal physicians who enter into service agreements with their agencies to address recruitment and retention problems (5 U.S.C. 5948). The following worksheet provides details on usage of PCA within SSA from FY 2015-2017.

**Table 3.31—Physicians' Comparability Allowance Worksheet**

		PY 2015 (Actual)	CY 2016 (Estimates)	BY 2017 <sup>1</sup> (Estimates)
1) Number of Physicians Receiving PCAs		2	2	2
2) Number of Physicians with One-Year PCA Agreement		0	0	0
3) Number of Physicians with Multi-Year PCA Agreements		2	2	2
4) Average Annual PCA Physician Pay (without PCA payment)		158,700	158,700	158,700
5) Average Annual PCA Payment		30,000	30,000	30,000
6) Number of Physicians Receiving PCAs by Category (non-add)	Category I Clinical Position			
	Category II Research Position			
	Category III Occupational Health			
	Category IV-A Disability Evaluation			
	Category IV-B Health and Medical Admin.	2	2	2

Maximum annual PCA amount paid to each category of physician:

See tables 3.32 and 3.33 for the maximum annual PCA amount paid to each category of SSA physicians. The amounts shown on the tables have allowed us to successfully recruit and retain our medical officers.

Recruitment and retention problem(s) for each category of physician:

SSA has had no medical officer (MO) accessions and 1 MO separation in fiscal year 2015.

SSA continues to offer PCAs to our MOs in order to recruit and retain the highly specialized physicians that we need. MOs are critical to our mission as they possess specialized skills required to write, revise, update, and develop agency medical policy, including medical policy that is used for evaluating claims for disability benefits under the Social Security disability insurance program or payments under the Supplemental Security Income program.

The PCA helps to compensate for the decrease in salary that a physician accepts when becoming a civil servant. Our MOs accept a reduction in income under the General Schedule (GS) pay scale, which is capped at the GS 15/step 10.

Also, PCAs continue to be a point of importance among our MOs and are a key factor in our ability to retain our current MOs and recruit new ones. If we do not retain the PCA, our MOs may elect to find employment in other areas or agencies where PCAs are offered.

SSA must continue to offer PCAs in order to recruit new physician MOs and retain the ones we have as we compete for their services with other government agencies.

<sup>1</sup> FY 2017 data will be approved during the FY 2018 budget cycle.

Degree to which recruitment and retention problems were alleviated at SSA through the use of PCAs in the prior fiscal year:

SSA was able to retain its medical officers by continuing to offer PCAs.

## MAXIMUM PHYSICIAN'S COMPARABILITY ALLOWANCES

**Table 3.32 Maximum Physician's Comparability Allowances- 1-Year Contract**

CATEGORY	PHYSICIANS WITH 24 MONTHS OR LESS OF SERVICE			PHYSICIANS WITH MORE THAN 24 MONTHS OF SERVICE		
	GS-13	GS-14	GS-15/SES	GS-13	GS-14	GS-15/SES
1. Occupational Health	*	*	*	*	*	*
2a. Disability Evaluation	*	*	*	*	*	*
2b. Administration	\$8,000	\$9,000	\$10,000	\$12,000	\$18,000	\$24,000

**Table 3.33—Maximum Physician's Comparability Allowances - 2-Year Contract**

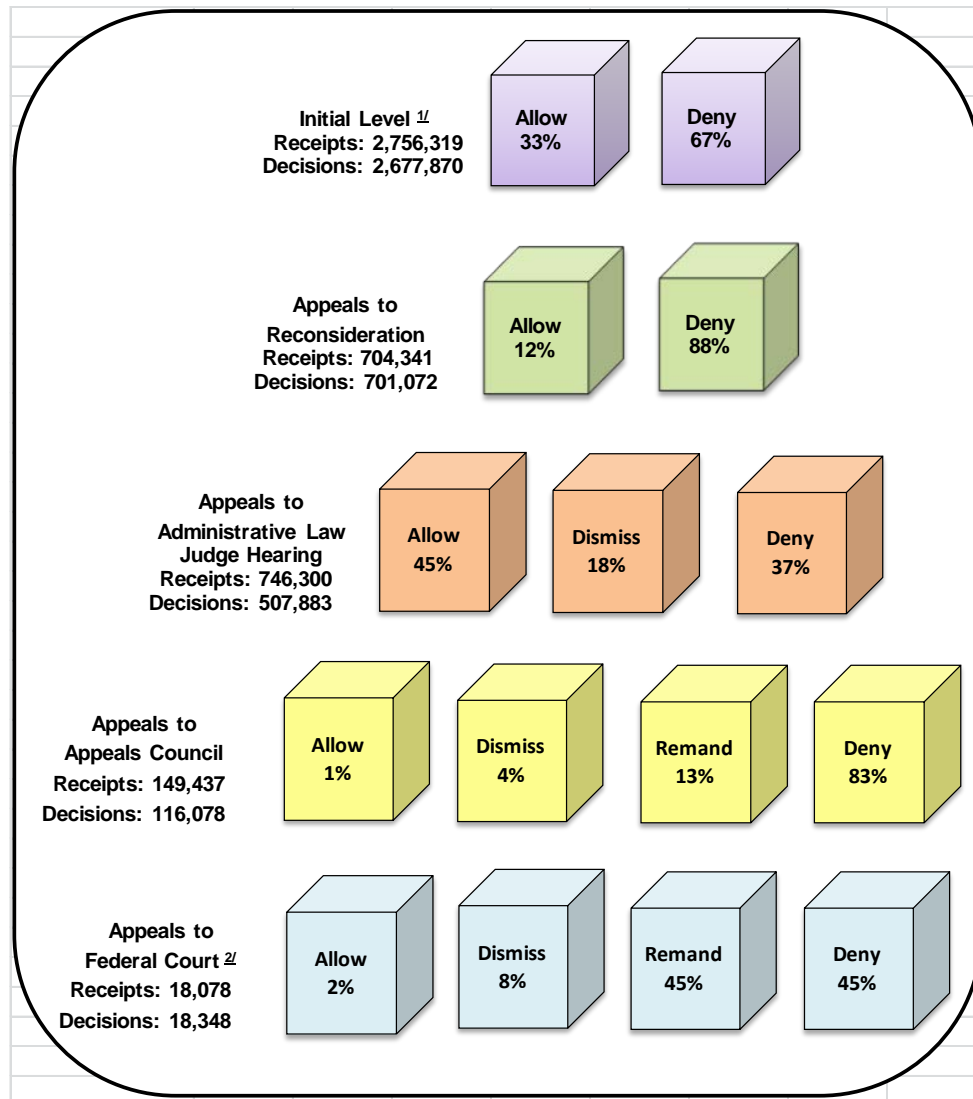
CATEGORY	PHYSICIANS WITH 24 MONTHS OR LESS OF SERVICE			PHYSICIANS WITH MORE THAN 24 MONTHS OF SERVICE		PHYSICIANS WITH MORE THAN 24 MONTHS BUT NOT MORE THAN 48 MONTHS OF SERVICE	PHYSICIANS WITH MORE THAN 48 MONTHS OF SERVICE
	GS-13	GS-14	GS-15/SES	GS-13	GS-14	GS-15/SES	GS-15/SES
1. Occupational Health	*	*	*	*	*	*	*
2a. Disability Evaluation	*	*	*	*	*	*	*
2b. Administration	\$12,000	\$13,000	\$14,000	\$18,000	\$24,000	\$27,000	\$30,000

\* SSA currently is not experiencing any recruitment or retention problems for the categories of Occupational Health and Disability Evaluation; therefore, no related maximum allowances have been established for these categories. Maximum allowances have been set for the category of Administration because the Commissioner has determined that there is a significant problem recruiting and retaining physicians for a few positions in this category in the Office of Disability Policy.

## FY 2015 DISABILITY WORKLOAD

The following table provides data on the FY 2015 disability claims and appeals workload.

**Table 3.34—FY 2015 Workload Data Disability Appeals\***



\*Includes Title II, Title XVI, and concurrent initial disability determinations and appeals decisions issued in FY 2015, regardless of the year in which the initial claim was filed, and regardless of whether the claimant ever received benefits (in a small number of cases with a favorable disability decision benefits are subsequently denied because the claimant does not meet other eligibility requirements.) Does not include claims where an eligibility determination was reached without a determination of disability. If a determination or appeals decision was made on Title II and Title XVI claims for the same person, the results are treated as one concurrent decision.

<sup>1/</sup> About 24% of initial level denials are issued in States that use the Disability Prototype process, which eliminates the reconsideration step of the appeals process. The first level of appeal for these cases is a hearing before an Administrative Law Judge.

<sup>2/</sup> Federal Court data includes appeals of Continuing Disability Reviews.

NOTE: Due to rounding, data may not always total 100%.

Prepared by: SSA, ODPMI (Office of Disability Program Management Information) January 14, 2014; Office of Budget, January 29, 2014  
Data Sources:

A) Initial and Reconsideration Data: SSA State Agency Operations Report

B) Administrative Law Judge and Appeals Council data: SSA Office of Disability Adjudication and Review (ODAR)

C) Federal Court data: SSA Office of General Counsel

## LEGISLATIVE PROPOSALS

1. **Use the Death Master File to Prevent Federal Improper Payments.** SSA receives about 2.5 million reports of death each year from many sources, such as family members, funeral homes, financial institutions, and the States. SSA is authorized to share all of the death information it maintains with Federal and State agencies that administer Federally-funded benefits, State agencies administering State-funded programs, and Federal and State agencies using the information for statistical and research activities. Currently, the Department of the Treasury's (Treasury) Do Not Pay Portal only receives a limited file, which excludes State death information. This proposal would increase the amount of death information available to Federal agencies for use in preventing improper payments by authorizing SSA to share all of the death information it maintains with Do Not Pay.
2. **Authorize SSA to Conduct a New Continuing Disability Review when Fraud Is Involved in a Prior Continuing Disability Review.** SSA is required to redetermine an individual's entitlement to disability benefits if there is reason to believe that fraud or similar fault were involved in the individual's application for benefits. During this redetermination, SSA must disregard any evidence where there is reason to believe that fraud or similar fault were involved in the providing of such evidence. This proposal would apply a similar requirement if SSA believes that fraud or similar fault were involved in a prior continuing disability review (CDR). This proposal would authorize SSA to conduct immediately a new CDR to determine continuing eligibility if there is reason to believe that fraud or similar fault was involved in a prior CDR. During this review, SSA would be authorized to disregard any evidence if there is reason to believe that fraud or similar fault was involved in the providing of such evidence.
3. **Authorize SSA to Use All Collection Tools to Recover Funds in Certain Scenarios, Such as When Someone Improperly Cashes a Beneficiary's Check or Removes a Benefit from a Joint Account.** Current law provides SSA only limited authority to recover certain incorrect payments that do not meet the statutory definition of an overpayment. Such incorrect payments include when someone improperly cashes a beneficiary's check or improperly removes benefit funds from a joint account after a beneficiary's death. For example, payments in excess of the amount due or paid after death are considered overpayments. Specifically, if a benefit payment of this nature is made to a joint account of the deceased worker and the other account holder is entitled to a spousal benefit, based on the deceased worker's record, it is considered an overpayment. However, if the other joint account holder is entitled to benefits on his/her

own record or not entitled to benefits, the improper payment is deemed an incorrect payment; a designation which limits SSA's recovery tools. The Budget proposes a consistent treatment, deeming them both as overpayments and subjecting them to the same broader range of collection procedures. This proposal would authorize SSA to use all of its overpayment collection tools, such as credit bureau reporting and administrative wage garnishment, to recover these incorrect payments.

4. **Allow SSA to Use Commercial Databases to Verify Real Property Data in the SSI Program.** This proposal would reduce improper payments by authorizing SSA to conduct data matches with private commercial databases that maintain data on ownership of real property (i.e., land and buildings), which can be a countable resource for SSI beneficiaries. The proposal would authorize SSA to use that information to automatically determine eligibility for benefits, after proper notification. Beneficiaries would be required to consent to allow SSA to access these databases as a condition of benefit receipt. All other current due process and appeal rights would be preserved.
5. **Increase from \$10 to 10 Percent the Minimum Amount SSA Can Withhold from a Monthly Old-Age, Survivors, and Disability Insurance Benefits to Recover an Overpayment.** When a beneficiary receives more Old-Age, Survivors, and Disability Insurance (OASDI) benefits than he or she should have, SSA can recover this overpayment by reducing the beneficiary's monthly benefit going forward. Depending on the beneficiary's financial circumstances, SSA may decide to recover less than the full amount of the monthly benefit until the overpayment is repaid in full. However, SSA is required to recover at least \$10 per month. This proposal would require SSA to recover at least 10 percent of the monthly OASDI benefit when recovering an overpayment. The SSI program already uses the 10 percent rule to recover overpayments.
6. **Exclude SSA Debts from Discharge in Bankruptcy.** Debts due to an overpayment of OASDI or SSI benefits, and certain Medicare-related debts that SSA also collects, are generally dischargeable in bankruptcy. This proposal would exclude such debts from discharge in bankruptcy, except when it would cause an undue hardship.
7. **Lower Electronic Wage Reporting Threshold to Five Employees.** SSA processes W-2 forms for Treasury. Currently, Treasury requires businesses that file 250 or more W-2s per calendar year to file electronically. This proposal would modify the Internal Revenue Code so that Treasury can require businesses that employ five or more employees to file electronically. This change would be phased-in over three years and would increase the efficiency and accuracy of this process, because electronic returns are completed more rapidly, and are generally more accurate, than scanned or keyed returns.

8. **Move from Annual to Quarterly Wage Reporting.** Employers report wages annually to SSA. However, from 1939 to 1977, SSA received wage reports on a quarterly basis. Increasing the frequency of wage reporting could enhance tax administration. More frequent reporting would also facilitate implementation of automated enrollment of employees in existing workplace pensions and be the foundation for the creation of a system of automatic workplace retirement accounts for workers who do not currently have access to a retirement plan. Furthermore, more frequent reporting may improve program integrity by providing timelier wage data for use by Federal, income-tested programs. This proposal would restructure the Federal wage reporting process by requiring employers to report wages on a quarterly basis<sup>1</sup>.
9. **Modify the treatment of certain debt referrals to the Treasury Offset Program:** The Budget proposal has two parts. First, the proposal would forgive a limited group of older debts that would have been impacted by implementation of the Food, Conservation, and Energy Act of 2008 provision (section 14219 of Public Law 110-246), which eliminated the prior 10-year statute of limitations for collection of legally enforceable, non-tax debts through TOP. This group includes debts from both former childhood beneficiaries and others. For similar debts that would not have been immediately impacted by the implementation of the regulation, SSA will continue to consider forgiveness on a case-by-case basis using its existing administrative authority. Second, going forward SSA will only be able to refer debts for former childhood beneficiaries to TOP if SSA has initiated collections within 10 years of an overpayment being incurred. This is intended to ensure that individuals are not surprised by a TOP collection that occurs years after a debt was incurred when individuals may have difficulty remembering the circumstances of the error.

The Budget proposals ensure that the Administration maintains its commitment to reducing improper payments, while preventing former debtors from being surprised by the abrupt seizure of their tax refunds, sometimes decades after the original overpayments were made. While Congress considers the legislative proposals, SSA will begin the gradual process of restarting TOP referrals for those debts not impacted by the Administration's proposals.<sup>2</sup>

10. **Strengthening Child Support Enforcement and Establishment.** SSA reduces a child's monthly SSI benefit by up to two thirds of any monthly child support payment he or she also receives. The President's Budget includes several proposals aimed at increasing and improving child support collections and program efficiency. By

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<sup>1</sup> This proposal would have no effect on the reporting of self-employment income.

<sup>2</sup> The budget assumes the proposal costs \$50 million over 10 years. The Office of the Chief actuary is working on a detailed estimate of this proposal.



increasing the amount of child support collected, these proposals would result in savings to the SSI program.

## **Improve Efficiency**

11. **Improve Collection of Pension Information and Transition after ten years to an Alternative Approach based on Years of Non-Covered Earnings.** Current law requires SSA to reduce OASDI benefits when someone also receives a pension based on work that was not covered by Social Security. SSA currently has a matching agreement with the Office of Personnel Management (OPM) to obtain information on Federal government retirees who receive a pension from work not covered by Social Security. However, SSA generally lacks a way to receive similar information from State and local governments. As a result, many of these pensions go unreported, leading to improper payments. The Budget re-proposes legislation that would improve reporting for non-covered pensions by including up to \$70 million for administrative expenses, \$50 million of which would be available to the States, to develop a mechanism so that the Social Security Administration could enforce the offsets for the Windfall Elimination Provision (WEP) and Government Pension Offset (GPO). This proposal would require State and local government pension payers to report information on pensions paid for non-covered work to SSA through an automated data exchange. In addition, the Budget proposes to transition after ten years to an alternative approach, which would adjust Social Security benefits based on the extent to which workers have non-covered earnings. SSA now collects data on non-covered employment and could calculate the offset without any disclosure from the individual.
12. **Establish Workers' Compensation Information Reporting.** Current law requires SSA to reduce an individual's Disability Insurance (DI) or SSI benefit if he or she receives workers' compensation (WC) or public disability benefits (PDB). SSA currently relies upon beneficiaries to report when they receive these benefits. This proposal would improve efficiency and program integrity by requiring States, local governments, and private insurers that administer WC and PDB to provide this information to SSA. Furthermore, this proposal would also provide for the development and implementation of a system to collect this information from States, local governments, and insurers.
13. **Eliminate Dedicated Accounts.** Under current law, if the retroactive SSI benefits due a child exceed six times the maximum monthly SSI benefit, plus any optional State SSI supplement, then SSA must deposit the benefits into a special account, called a "dedicated account." The child's representative payee—who is typically a parent—can expend funds from such an account only for education, health care, and certain other expenses. These restrictions are often considered intrusive and confusing, and oversight

of these accounts is labor-intensive for both SSA and representative payees. This proposal would eliminate dedicated accounts.

14. **Provide Mandatory Funding Dedicated to Modernizing SSA's Information Technology.** This proposal would provide SSA with \$240 million in mandatory funding over fiscal years 2018, 2019, and 2020 dedicated to modernizing SSA's information technology (IT), specifically its core databases, programming languages, and IT infrastructure. These systems are becoming antiquated, and the staff experienced in maintaining these systems are approaching retirement and are difficult to replace. SSA would use the proposed funds to invest in complex, multi-year IT projects necessary to update these systems in accordance with modern design principles.

### **Improve Benefits and Promote Work Opportunity**

15. **Extend SSI Time Limits for Qualified Refugees.** Refugees and certain other humanitarian immigrants who are disabled or elderly are potentially eligible for SSI benefits for up to seven years from the date they attained their immigration status, and without time limit if they become naturalized. Congress acknowledged that humanitarian immigrants might be unable to attain citizenship within the seven-year period of SSI eligibility, even if they apply for naturalization as soon as they are eligible. Accordingly, Congress temporarily extended the time-limited SSI eligibility period from seven years to nine years for fiscal years 2009-2011. However, effective October 2011, the SSI eligibility period for refugees and other humanitarian immigrants reverted to seven years. This proposal would underscore the nation's commitment to refugees, asylees, and other humanitarian immigrants—who come to America with very little and frequently have nowhere else to go—by again extending the time limit from seven to nine years during fiscal years 2017 and 2018.
16. **Conform Treatment of State and Local Government Earned Income Tax Credits and Child Tax Credits for SSI.** When determining someone's eligibility for, and benefit amounts under, the SSI program, SSA excludes Federal earned income tax credits (EITC) and child tax credits (CTC). However, the law requires SSA to count State EITCs and CTCs for SSI purposes. This proposal would simplify administration of the SSI program by excluding State EITCs and CTCs, in the manner in which similar, Federal tax payments are excluded.
17. **Terminate Step Child Benefits in the Same Month as His or Her Parent's Benefits Terminate.** A parent and stepchild may receive benefits on the record of a worker, but if the marriage terminates by divorce, they are no longer eligible for benefits. When a stepchild's parent is divorced, spousal benefits terminate in the month before the month of the final divorce. However, benefits for the stepchild terminate one month later, in the month of the final divorce. This proposal would fix this discrepancy by ending

benefits for the stepchild in the same month as the parent, in the month before the final divorce.

18. **Create an Interagency Coordinating Council on Workforce Attachment.** This proposal would create and fully fund an interagency council comprising Federal agencies involved in improving the well-being of people with health impairments and disabilities, including the Office of Management and Budget; the Departments of Education, Health and Human Services, Labor, and the Treasury; and the Social Security Administration. The council's mission would be to improve workforce attachment for people with health impairments and disabilities, and its duties would include developing and maintaining a strategic plan to improve work outcomes, evaluating and recommending improvements to Federal programs, designing and overseeing demonstration projects, and improving interagency coordination.

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**APPROPRIATION LANGUAGE**

For expenses necessary for the Office of Inspector General in carrying out the provisions of the Inspector General Act of 1978, [\$29,787,000] \$31,000,000, together with not to exceed [75,713,000] \$81,000,000, to be transferred and expended as authorized by section 201(g)(1) of the Social Security Act from the Federal Old-Age and Survivors Insurance Trust Fund and the Federal Disability Insurance Trust Fund.

In addition, an amount not to exceed 3 percent of the total provided in this appropriation may be transferred from the “Limitation on Administrative Expenses,” Social Security Administration, to be merged with this account, to be available for the time and purposes for which this account is available: *Provided*, That notice of such transfers shall be transmitted promptly to the Committees on Appropriations of the House of Representatives and the Senate at least 15 days in advance of any transfer. (*Departments of Labor, Health, and Human Services, and Education, and Related Agencies Appropriations Act, 2016*).

## GENERAL STATEMENT

### OVERVIEW

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The FY 2017 President's Budget for the SSA Office of the Inspector General (OIG) is \$112,000,000 in total budget authority and 560 FTE. This is \$6,500,000 above the funding received from the Consolidated Appropriations Act, 2016 (P.L. 114-113).

The FY 2017 budget request will support spending at an operating level that will allow our auditors and investigators to meet their productivity goals. The budget request will provide funding for a 560 FTE staffing level, the President's proposed pay raise, payroll increases (e.g., within-grade increases, scheduled promotions, health benefits, etc.), and other related support costs.

OIG employees on duty have dropped from 610 in FY 2006 to 526 at the end of FY 2015, a decrease of 84 employees. Our current budget request assumes OIG will add additional staff in support Cooperative Disability Investigations (CDI) unit expansion, and provides ongoing support for the major initiatives already in place. OIG will continue to meet its homeland security responsibilities through audit and investigative activities that focus on strengthening the enumeration process and combating SSN misuse.

This FY 2017 budget includes \$727,000 for training, which satisfies all FY 2017 training requirements for OIG. OIG will contribute to the Council of the Inspectors General on Integrity and Efficiency (CIGIE) in FY 2017, and \$253,000 has been requested for that purpose.

Table 4.1—Justification

	FY 2015 Actual	FY 2016 Enacted	FY 2017 Estimate	FY16 to FY17 Change
FTE	528	540	560	+20
Appropriation	\$ 103,350,000	\$ 105,500,000	\$ 112,000,000	+ \$ 6,500,000
Total Obligations	\$ 102,830,115	\$ 105,500,000	\$ 112,000,000	+ \$ 6,500,000
Unobligated balance lapsing	\$ 773,878	\$ 0	\$ 0	\$ 0

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## ONGOING INITIATIVES

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### Computer Forensic Cyber-Related Investigations

Our *Digital Forensics Team* (DFT) provides forensic support to investigations involving at least one computer, network, electronic data storage, communication, mobile device or other form of digital media; as well as the collection, examination, analysis and reporting of the data acquired. The DFT provides much needed forensic assistance to the field in support of ongoing investigations. In FY 2015, the DFT implemented the initial infrastructure of a “private cloud” based forensics network that will allow the DFT to be at the forefront of digital forensics and provide an overall better solution for the OIG. This infrastructure allows the DFT to maintain a secure central repository for all forensic evidence and DFT case work. Furthermore, it provides an isolated network in support of the newly formed *Intelligence and Analysis Division* (IAD). Moving forward, the DFT will need additional funds to maintain, secure and expand the forensic network to meet the growing demands as they relate to the ever evolving cyber-crime movement. Additional funds will also allow the DFT to increase its infrastructure and data storage capabilities. Data storage is vital to a computer forensics program so we can provide adequate support as components request it.

In addition to traditional forensic services, the DFT works hand-in-hand with SSA to protect SSA’s network and Personally Identifiable Information (PII). With the issuance of *National Security Presidential Directive 54* and the emphasis placed on the *Government’s Trusted Internet Connection* initiative, protecting government networks has become a priority. There has been an increase in cyber based attacks on networks, to include government maintained electronic data; therefore, the potential for computer-based fraud against SSA systems and programs is growing exponentially. Techniques used to compromise computer systems are on the rise nationally, as computer crimes become more prevalent. To be effective, we must keep pace with technological advances. Our FY 2017 budget request includes funds to provide our computer forensic investigators with the equipment, training, and software needed to combat computer crimes.

DFT personnel received basic network intrusion training in FY 2013. In FY 2017, DFT will receive additional skills training. FY 2017 funding will allow DFT to adequately staff the *Computer Security Incident Response Team* and for members to attend additional cyber training, better preparing them to handle cyber-attack situations. It is the goal of the DFT to become



well trained in this area to keep the investigations in-house and protect the PII held within SSA's network.

### **Cooperative Disability Investigations**

The Cooperative Disability Investigations (CDI) Program is a key SSA anti-fraud initiative that plays a vital role in combating fraud, similar fault, and abuse within SSA's disability programs. CDI units, consisting of personnel from SSA, OIG, State disability determination agencies, and local law enforcement investigate initial disability claims and post-entitlement events involving suspected fraud. CDI units investigate claimants as well as third parties who are potentially facilitating disability fraud.

CDI investigations help SSA:

- prevent claimants who do not meet eligibility requirements from receiving benefits;
- terminate the benefits of those who have concealed medical improvement or failed to disclose substantial gainful activity; or
- revisit administrative determinations of claimants who may never have been eligible for benefits.

In FY 2015, the program consisted of 36 units covering 31 states and the Commonwealth of Puerto Rico. We will continue to expand this program in FY 2016 and FY 2017. The *Bipartisan Budget Act of 2015* requires SSA to expand the CDI program to cover all States and Territories no later than October 1, 2022. This requirement will be subject to the availability of funding and participation of local law enforcement agencies. During FY 2016, the CDI Program operated 38 units in 32 states, the District of Columbia, and Puerto Rico. As the CDI program expands, we will add OIG staff to support the CDI mission both in the field and at headquarters, and to replace those resources shifted away from our other investigative priorities.

### **Allegation Management and Fugitive Enforcement**

The Allegation Management and Fugitive Enforcement Division (AMFED) is responsible for receiving, analyzing, and referring allegations of fraud, waste, and abuse in Social Security programs and operations. AMFED is also responsible for managing the fugitive warrant verification and referral process for Social Security's fugitive enforcement operations.

In FY 2015, these processes contributed significantly to the mission of OIG and SSA. AMFED received 89,801 allegations. Through the development of referred allegations, SSA identified \$3,029,573 in benefit overpayments. AMFED matched 160,375 fugitive subjects from incoming Federal, State, and local warrant files and referred them to law enforcement for apprehension and warrant verification. AMFED referred 1,646 fugitive subjects for benefit suspension. Through these data-sharing efforts, law enforcement report that 442 fugitives were apprehended.

## Civil Monetary Penalty Program

Section 701 of the Bipartisan Budget Act of 2015, PL 114-74 (BBA of 2015) amended the Federal Civil Penalties Inflation Adjustment Act of 1990 (the Inflation Adjustment Act) (Public Law 104-410), to improve the effectiveness of civil monetary penalties and to maintain their deterrent effect. The provision requires agencies to: (1) adjust the level of civil monetary penalties with an initial “catch-up” adjustment through an interim final rulemaking; and (2) make subsequent annual adjustments for inflation. Inflation adjustments will be based on the percent change in the Consumer Price Index for all Urban Consumers (CPI-U) for the month of October preceding the date of the adjustment, relative to the October CPI-U in the year of the previous adjustment. The law requires agencies to publish interim final rules with the initial penalty adjustment amounts by July 1, 2016, and the new penalty levels must take effect no later than August 1, 2016. Penalties under the Social Security Act, which were previously excluded by a 1996 amendment to the Inflation Adjustment Act, are now subject to the catch-up and annual inflation increases. SSA penalty levels updated pursuant to section 701 of the BBA of 2015 will apply for 2016 and be subject to annual increase as will all other penalties subject to the Inflation Adjustment Act as amended in 2015.

We continue our emphasis on enforcing Section 1129 of the *Social Security Act*, which authorizes Civil Monetary Penalties (CMPs) against those who make false statements or representations in connection with obtaining or retaining payments under Titles II, VIII, or XVI of the *Social Security Act*. We can also penalize representative payees for wrongful conversion of payments and penalize individuals who knowingly withhold a material fact from SSA. After consultation with the Department of Justice, we are authorized to impose penalties of up to \$5,000 for each false statement, representation, conversion, or omission. A person may also be subject to an assessment, in lieu of damages, of up to *twice* the amount of any resulting overpayment. In addition to providing for an initial catch up adjustment for all CMPs imposed under section 1129 of the *Social Security Act*, the BBA of 2015, amended section 1129 to specifically increase the maximum CMP that may be imposed against an individual who violates their position of trust with an applicant for Social Security benefits from up to \$5,000 to up to \$7,500. A person is considered to be in a position of trust if they receive a fee or other income with respect to benefits under the *Social Security Act*, including a claimant representative, translator, or current or former SSA employee or who is a physician or other health care provider who submits, or causes the submission of, medical or other evidence in connection with an application for benefits.

Our CMP authority allows us to recover fraud losses from those responsible, when prosecutors decline to pursue OIG investigations for criminal prosecution. Many times, our investigations of individuals result in fraud losses below financial thresholds set by U.S. Attorneys’ offices. The Section 1129 program is an effective supplemental tool to prevent and deter fraud, and recover fraud losses, thereby strengthening public trust in the agency. Thus, we remain committed to aggressive enforcement, and we are committed to increasing the number of cases we resolve each year. Thus, we anticipate the number of hearing requests to increase. The increase in Section 1129 cases going to hearings before administrative law judges will likely require additional attorney travel. Also, using authority delegated by the Commissioner of Social Security, we aggressively enforce Section 1140 of the Social Security Act. Section 1140, the consumer protection prong of the agency’s civil monetary penalty program, prohibits people or

companies from misleading consumers by giving the false impression that they are associated with, or endorsed by, SSA when they advertise, solicit services, or otherwise communicate with the public. These communications can take many forms, including mailed or televised advertisements, Internet sites, social media accounts, and mobile applications. Section 1140 also prohibits the reproduction and sale of Social Security publications and forms without authorization. We can impose CMPs of up to \$5,000 for each violation and \$25,000 for each violative broadcast/telecast aired. We continually explore outreach opportunities to educate the public on how to recognize and avoid scams, and we welcome the opportunity to work with companies to develop innovative approaches to combat Section 1140 violations.

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## SSA'S SIGNIFICANT MANAGEMENT ISSUES

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OIG annually identifies the most significant management issues facing SSA based on congressional mandates and its audit and investigative work. These issues are:

1. Reduce the Hearings Backlog and Prevent its Recurrence
2. Improve the Timeliness and Quality of the Disability Process
3. Reduce Improper Payments and Increase Overpayments Recoveries
4. Improve Customer Service
5. Invest in Information Technology Infrastructure to Support Current and Future Workloads
6. Strengthen the Integrity and Protection of the Social Security Number
7. Strengthen Planning, Transparency, and Accountability

A summary of each management issue is discussed below:

### **Issue #1: Reduce the Hearings Backlog and Prevent its Recurrence**

While SSA continues focusing on the quality and consistency of hearing decisions, it is facing worsening average processing times and increasing pending hearings.

One part of the disability program, the hearings process, has experienced worsening timeliness and growing backlogs. For instance, the average processing time for a hearing increased from 426 days in FY 2010 to 480 days in FY 2015. In addition, the number of pending hearings grew from about 705,000 cases at the end of FY 2010 to over 1 million cases at the end of FY 2015.

In a September 2015 report on the hearings backlog, we stated SSA had not published a long term, multi-year strategy to address the growing backlog and worsening timeliness; however, SSA had begun implementing 35 initiatives to address these issues. In a separate September report on hearing office average processing times, we discussed large variances in timeliness among hearing offices. For instance, the Miami Hearing Office had an average processing time that was 300 days longer than the average processing time in the Orange, California Hearing Office.

Four factors contributed to the increase in the number of pending claims: (1) an increase in the number of hearing requests, (2) a decrease in the number of available administrative law judges (ALJ), (3) a decrease in ALJ productivity, and (4) a decrease in senior attorney adjudicator

decisions. SSA received about 600,000 hearing requests in FY 2008, over 800,000 hearing requests in each of FYs 2011 through 2014, and about 746,000 hearing requests in FY 2015. Between FYs 2012 and 2015, the number of available ALJs declined about 5 percent. ALJ productivity declined approximately 13 percent between FYs 2012 and 2015. Increased Agency emphasis on decisional quality has led to ALJs spending more time on cases. The Agency has also reduced the number of senior attorney adjudicator decisions due to quality concerns.

## **Issue #2: Improve the Timeliness and Quality of the Disability Process**

SSA needs to address receipt of millions of initial disability and reconsideration claims and backlogs of initial disability claims and continuing disability reviews (CDR), while also protecting its disability programs from fraud and encouraging beneficiaries to return to work.

**Disability Claims Backlog:** SSA completed over 2.8 million initial and 757,000 reconsideration disability claims in FY 2014 and more than 2.75 million initial and 723,000 reconsideration claims in FY 2015. While initial claims have declined in recent years, SSA had over 621,000 initial disability claims pending at the end of FY 2015. Similarly, SSA expects to have approximately 733,000 initial disability claims pending at the end of FY 2016.

**CDR Backlog:** According to SSA, at the end of FY 2015, there was a backlog of more than 726,000 full medical CDRs, down from over 906,000 cases backlogged at the end of FY 2014. As we stated in our August 2014 report on *The Social Security Administration's Completion of Program Integrity Workloads*, SSA had a backlog because it had not completed all full medical CDRs when they became due. Although SSA increased the number of full medical CDRs completed in recent years, it was still lower than needed to eliminate the backlog. As a result, SSA missed potential savings. Had SSA conducted full medical CDRs at historic levels, we estimated it would have identified billions of dollars in additional Federal benefit savings.

**Disability Fraud:** High-profile fraud schemes in New York, Puerto Rico, and West Virginia highlighted how vulnerable SSA's disability programs are to fraud. In New York, criminal facilitators conspired with disability applicants to feign disabilities and submit disability applications with fabricated and/or exaggerated ailments, which led to many individuals receiving disability benefits to which they were not eligible. Similarly, in Puerto Rico, third-party facilitators conspired with claimants to submit medical documentation that fabricated or exaggerated disabilities. In addition, it was alleged that an ALJ in Huntington, West Virginia, conspired with an attorney to grant favorable decisions to disability claimants who were potentially ineligible for benefits.

The fraud schemes revealed that numerous individuals, with the assistance of the same attorney, claimant representative, or other facilitator, could apply for disability benefits, allege similar physical and/or mental impairments, provide similar fabricated or exaggerated medical documentation certified by a common physician or medical facility, and receive disability benefits. These cases highlighted SSA's lack of the information technology (IT) infrastructure and front-end analytical tools necessary to screen applications for "potential fraud warnings" and review or investigate further before approving. For example, SSA was not systematically flagging a string of disability claims from applicants in the same geographic area with a common

claimant representative and similar alleged disabilities. Watchful SSA and Disability Determination Services (DDS) employees caught the patterns in the fraudulent claims in New York and Puerto Rico, but not before the Agency approved those claims and made millions of dollars in payments to the beneficiaries.

**Return to Work:** Historically, about one-half of 1 percent of disabled beneficiaries leave the rolls annually because of a return to work. *The Ticket to Work and Self Sufficiency Program* was created to assist beneficiaries return to work. However, an evaluation of the program concluded that, “. . . rigorous impact analysis failed to provide strong evidence of its impact on employment.” The Ticket program’s lack of strong evidence of improved employment outcomes among beneficiaries, is representative of the various other return to work demonstration projects and programs. As a result, the Agency needs to continue exploring policies that reduce administrative barriers for beneficiaries to return to work, simplify existing work incentives and create new opportunities to facilitate beneficiaries return to work efforts. Furthermore, according to SSA, when medical CDRs result in beneficiaries losing eligibility for SSDI, approximately 20 percent of these individuals return to SSDI within 8 years of the cessation determination.

### **Issue #3: Reduce Improper Payments and Increase Overpayment Recoveries**

SSA is one of several Federal agencies that have a high amount of improper payments. In FY 2014, the last fiscal year for which data was available, SSA reported about \$9.8 billion in over- or underpayments and incurred an administrative cost of \$0.07 for every overpayment dollar it collected. Further, SSA needs to adhere to the requirements in *Executive Order 13520, Reducing Improper Payments and Eliminating Waste in Federal Programs, the Improper Payments Elimination and Recovery Act of 2010* (IPERA) (Pub. L. No. 111-204), and the *Improper Payments Elimination and Recovery Improvement Act of 2012* (IPERIA) (Pub. L. No. 112-248).

**Improper Payment Rates:** Workers, employers, and taxpayers who fund SSA’s programs deserve to have their tax dollars effectively managed. As a result, SSA must be a responsible steward of the funds entrusted to its care and minimize the risk of making improper payments. SSA strives to balance its service commitments to the public with its stewardship responsibilities. However, given the size and complexity of the programs the Agency administers, some payment errors will occur.

For example, according to SSA, in FY 2014,

- The Old-Age, Survivors, and Disability Insurance (OASDI) overpayment error was \$4.6 billion or 0.5 percent of program outlays, and the underpayment error was \$472 million or 0.05 percent of program outlays; and
- The SSI overpayment error was \$3.9 billion or 7 percent of program outlays, and the underpayment error was \$840 million or 1.5 percent of program outlays.

For FYs 2015 through 2017, SSA’s goal was to maintain OASDI payment accuracy at 99.8 percent for both over- and underpayments; and for SSI, the Agency’s goal was to achieve

over- and underpayment accuracy rates of 95 and 98.8 percent, respectively. The Agency only met one of its payment accuracy targets in the last 5 years

**Executive Order 13520, Improper Payments Elimination and Recovery Act (IPERA), and Improper Payments Elimination and Recovery Improvement Act (IPERIA):** In November 2009, the President issued Executive Order 13520 on reducing improper payments. IPERA and IPERIA were enacted in July 2010 and January 2013, respectively, to refine steps agencies should take to address improper payments. As a result, all agencies with high-risk programs—those with significant improper payments—are required to intensify their efforts to eliminate payment errors. The Office of Management and Budget designated SSA’s programs as high-risk.

**Overpayment Recoveries:** Once SSA determines an individual has been overpaid, it attempts to recover the overpayment. According to SSA, in FY 2015, it recovered \$3.4 billion in overpayments at an administrative cost of \$0.07 for every dollar collected and ended the fiscal year with an uncollected overpayment balance of \$18.5 billion.

#### **Issue #4: Improve Customer Service**

SSA faces several challenges, such as increasing workloads and representative payee oversight, as it pursues its mission to deliver services that meet the public’s changing needs.

**Increased Workload with Reduced Staff:** SSA stated that the population aged 65 and older will grow by more than 18 million from 2015 to 2025, and an additional 8 million by 2030, thereby dramatically increasing the demand for its services. In FY 2015, SSA received approximately 5 million retirement, survivors, and Medicare applications; completed 2.7 million initial disability claims; and completed over 663,000 requests for hearings.

In addition to these workloads, in FY 2015, SSA

- completed 723,000 reconsiderations and 150,000 Appeals Council requests for review;
- issued over 16 million new and replacement Social Security number (SSN) cards;
- posted over 275 million earnings items to workers’ records;
- handled nearly 37 million calls to its national 800-Number;
- assisted 41 million visitors in field offices; and
- mailed nearly 350 million notices.

SSA faces a challenge of losing its institutional knowledge because of steady losses of employees through retirement. As of August 2015, approximately 16 percent of SSA employees was eligible for retirement. SSA estimates that 28 percent of its permanent employees will be eligible to retire by 2020, and their retirement could result in various mission-critical skills gaps.

In its February 2015 High-Risk Series report, the Government Accountability Office noted that agencies had taken important steps to better position the Government to close current and emerging critical skills gaps, but agencies will need to implement specific strategies and evaluate their results to demonstrate progress on addressing critical skill gaps. SSA recognizes that identifying and reducing skill gaps at all organizational levels are important to the Agency. SSA developed a long-term vision, expanded the use of online services, improved telephone services, and continued video services expansion during FY 2015. In April 2015, SSA released its Vision 2025 publication, which states where SSA would like to be in 10 years with its workforce, technology, and customer service. Vision 2025 identifies three priorities: a superior customer experience, exceptional employees, and an innovative organization to guide its service delivery efforts today and in the future. SSA has developed milestones in its revised FY 2014 – 2018 Agency Strategic Plan that support Vision 2025 goals.

**Customer Service Expectations:** The dramatic increase in mobile and broadband Internet access is driving public expectation for instantaneous service through multiple delivery channels. Rapid advances in technology introduce new opportunities for service delivery as well as requiring that SSA remain vigilant about potential security and fraud vulnerabilities. Furthermore, customers who seek benefits from SSA also interact with other agencies and private organizations. SSA acknowledges it could improve its customer service through partnerships with these organizations to learn from each other, share data, and develop processes that help customers access services more quickly and easily.

**Representative Payment Program:** SSA appoints representative payees to manage the benefits of incapable beneficiaries and recipients because of their age or mental or physical impairment. SSA acknowledges that representative payees play a significant role in many beneficiaries' lives, and it consistently explores ways to better identify, screen, and appoint representative payees. In January 2015, SSA reported that approximately 6 million representative payees were managing about \$76.8 billion in payments for 8.7 million beneficiaries and recipients. SSA continues finding problems with representative payees who improperly use and account for beneficiaries' payments during their reviews. Likewise, our audits continue to find problems with SSA's *Representative Payment Program*. Our January 2016 report, Volume Individual Representative Payees, summarized previous volume individual payee review findings. Of significance, our reviews noted several payees with prior financial liens and judgments or bankruptcy filings of which SSA had not previously been aware. We also identified several recurring findings, including representative payees collecting unallowable and/or excessive fees. We made two recommendations that SSA enhance its continuous monitoring program to help identify the issues consistently found by the Office of the Inspector General in its audits of high-volume individual representative payees.

## **Issue #5: Invest in IT Infrastructure to Support Current and Future Workloads**

Federal agencies must ensure they wisely invest their scarce resources. SSA faces the challenge of determining how best to use technology to accomplish its mission within its budget and resource constraints, while ensuring its information systems are secure and sensitive data are protected.



**Cyber-security:** Federal information systems—and the information they hold—are increasingly becoming targets of cyber-attacks. Recent breaches at several Federal agencies have underscored the importance of securing Federal systems and protecting sensitive information. The information SSA houses on nearly every U.S. citizen is invaluable to would-be hackers and potential identity thieves. Consequently, the Agency’s information systems may be at particular risk of attack. Given the highly sensitive nature of the personal information in its systems, it is imperative that SSA have a robust information security program.

Our prior audit and investigative work has revealed a number of concerns with the security of SSA’s information systems. Since FY 2012, auditors have concluded that the risk and severity of SSA’s information security weaknesses identified constituted a significant deficiency under the *Federal Information Security Management Act of 2002* (Pub. L. No. 107-347). Those security deficiencies, when aggregated, created a weakness in SSA’s overall information systems security program that the auditors concluded significantly compromised the security of the Agency’s information and information systems. Additionally, other recent audits and evaluations have identified serious concerns with SSA’s information security program.

To address ever-increasing security challenges, it is crucial that SSA implement a well-designed, continuous monitoring strategy to monitor and assess security controls. SSA has issued its *Continuous Monitoring Strategy* but is still implementing it. The Office of Management and Budget and National Institute of Standards and Technology require near real-time, continuous monitoring for risk management and risk-based decision-making.

**IT Physical Infrastructure:** One of SSA’s major IT investments in recent years has been replacing its existing National Computer Center (NCC). The NCC has been in continuous operation as a data center since it opened in 1980 and, while its computing capacity has been expanded over the years, increasing workloads and expanding telecommunication services severely strained its ability to support the Agency’s business. SSA received \$500 million from the *American Recovery and Reinvestment Act* to replace the NCC with a new National Support Center (NSC). SSA must diligently monitor migration activities to ensure a successful transition from the NCC to the new NSC.

**Development and Implementation of Secure Electronic Services:** According to SSA, in FY 2015, the Agency’s field offices saw about 41 million visitors, and it handled over 37 million calls to its national 800-number. To support its increasing workloads, SSA has developed and implemented over 30 electronic services to the public, businesses, and other government agencies. With these expanded services, SSA reported it processed more than 85 million transactions online in FY 2015.

While expanding its inventory of electronic services, the Agency needs to ensure those services are secure. Prior investigative and audit work have identified multiple incidents of fraud committed through SSA’s electronic services.

**Implementation of Major IT Projects:** SSA faces challenges in executing and implementing major IT projects and delivering expected functions on-schedule and within budget.



To simplify system support and maintenance, improve the speed and quality of the disability process, and reduce the overall growth rate of infrastructure costs, SSA is developing the *Disability Case Processing System* (DCPS), which, once implemented, will be used by all disability determination services (DDS). However, despite investing more than \$344 million in DCPS over 7 years, SSA has not yet fully developed and implemented a system. The project has faced schedule delays and increasing stakeholder concerns.

In response to a request from the Chairman of the House Subcommittee on Social Security, Committee on Ways and Means, we evaluated the DCPS project in FY 2015. Our November 2014 report recommended that SSA suspend the development of certain custom-built components of DCPS until the Agency evaluated and determined whether off-the-shelf or modernized SSA-owned software are viable alternatives. In May 2015, we initiated a review to examine SSA's efforts to evaluate those alternatives.

In May 2015, we issued a report with our observations and recommendations for DCPS. In that review, we found that previous Beta versions of DCPS had significant functionality limitations. Those limitations caused delays in processing and required that the DDSs develop various "workarounds" to process claims through the system. DDS personnel expressed many concerns with the efficiency and effectiveness of the rollout as well as SSA management's communication with users.

In 2015, SSA partnered with the United States Digital Service to evaluate the Beta application and concluded that, as built, it would not meet the Agency's needs. SSA discontinued developing the Beta application and began developing a new DCPS system using Agile software development practices. The Agency expects to deliver the first version of the new product by the end of 2016.

## Issue #6: Strengthen the Integrity and Protection of the Social Security Number

SSA issued over 16 million original and replacement social security number (SSN) cards in FY 2015. In addition, the Agency received and processed about 275 million wage items in FY 2015. Protecting the SSN and properly posting the wages reported under SSNs are critical to ensuring SSN integrity and eligible individuals receive the full benefits due them.

**SSN Use:** The SSN is heavily relied on as an identifier in U.S. society and is valuable as an illegal commodity. Additionally, the SSN is critical in accurately recording workers' earnings on which future benefit payments are based. For these reasons, properly assigning SSNs only to those individuals authorized to obtain them, protecting SSN information once the Agency assigns the numbers, and accurately posting the earnings reported under SSNs are critical SSA missions.

**SSN Misuse:** While SSA has improved its enumeration process, given the preponderance of SSN misuse and identity theft in U.S. society, we continue to believe protection of this critical number is a considerable challenge for SSA as well as its millions of stakeholders. Unfortunately, once SSA assigns an SSN, it has no authority to control how other entities collect, use, and protect it. Our audit and investigative work have shown that the more SSNs are unnecessarily used, the higher the probability individuals could use them to commit crimes. For example, some educational institutions unnecessarily collect and use SSNs as a primary student identifier. A March 2015 study revealed that 12.7 million consumers were victims of identity fraud in 2014. Two-thirds of these victims had received a data breach notification in the same year.

We remain concerned about SSN misuse by noncitizens who are not authorized to work in the United States. We are also concerned that some individuals misuse SSNs for identity theft purposes. In addition, recent audit work determined that over 6 million number holders age 112 or older had no death information on their Numident records. The accuracy and integrity of death information is critical because Federal benefit paying entities, the Department of Homeland Security, the Internal Revenue Service, State and local governments, and private industry customers rely on the Death Master File to detect unreported deaths and prevent fraud.

**Earnings:** SSA's programs depend on earnings information to determine whether an individual is eligible for benefits and to calculate the amount of benefit payments. Properly posting earnings ensures eligible individuals receive the full retirement, survivors, and/or disability benefits due them. If employers report earnings information incorrectly or not at all, SSA cannot ensure all individuals entitled to benefits are receiving the correct payment amounts.

SSA spends scarce resources correcting earnings data when employers report incorrect information. The *Earnings Suspense File* (ESF) is the Agency's repository of wage reports on which wage earners' names and SSNs fail to match SSA's records. Per the latest available data, the ESF had accumulated over \$1.2 trillion in wages and 333 million wage items for Tax Years 1937 through 2012. In Tax Year 2012 alone, SSA posted 6.9 million wage items, representing \$71 billion, to the ESF. From Tax Years 2003 to 2012, the ESF grew by approximately \$749 billion in wages and 90 million wage items, representing about two-thirds of the total wages in the ESF and one-third of the total wage items.

## Issue #7: Strengthen Planning, Transparency, and Accountability

Planning, transparency, and accountability are critical factors in effective management. Failure to plan properly to meet its mission and challenges will lessen the Agency's ability to provide its services efficiently and effectively now and in the future. Similarly, mismanagement and waste as well as a lack of transparency for citizens in Government operations, can erode trust in SSA's ability to tackle the challenges it faces.

**Planning:** In the past, the Agency developed multiple-year strategic plans, which included general descriptions of the programs, processes, and resources needed to meet its mission and strategic objectives. SSA has also produced other strategic plans, like the *Information Resources Management Strategic* and *Human Capital Operating Plans*, which covered periods of only a few years. While planning for the next few years is important, a longer term vision is critical to ensuring the Agency has the programs, processes, staff, and infrastructure required to provide needed services 10 to 20 years from now and beyond.

**Transparency:** While the Agency has many performance measures and goals on which it publicly reports, we have questioned the usefulness of some of the measures and goals. We have recommended that SSA develop more outcome-based performance measures and goals, including performance targets based on SSA's long-term outcomes instead of annual budgets.

Similar to our previous comments on the Agency's metrics, SSA's FY 2015 performance measures could be more outcome-based. While many appear to measure outcomes because of the manner in which they are worded, they still mostly measure outputs. For example, one performance measure, *Enhance Our Security Features and Business Processes to Prevent and Detect Fraud*, appears to measure the prevention and detection of fraud. However, the data definition for the measure reveals that SSA is only measuring public fraud referrals. While fraud referrals may help detect and prevent fraud, the fraud referrals are steps in the process, not the desired outcome. The fraud referrals could be erroneous reports of fraud that SSA spends its resources investigating without achieving what it intended to achieve. SSA should measure the percentage of referrals that actually detect or prevent fraud to show the true outcome of the process being implemented. Measuring outputs, or steps in a process, does not inform the public whether SSA is managing towards the outcomes it needs to efficiently and effectively provide its services and meet its mission.

**Independent Auditor's Report:** The FY 2015 *Independent Auditor's Report* contained three significant deficiencies in internal control (the full text of the report can be found in SSA's FY 2015 *Agency Financial Report*). First, the auditor identified three deficiencies in internal control that, when aggregated, were considered to be a significant deficiency in internal controls related to calculation, recording, and prevention of overpayments. Specifically, the auditor noted calculation errors in 24 percent of the overpayment items selected in a statistical sample. In addition, SSA has a systems limitation where overpayment installments extending past 2049 are not tracked and reported. Further, SSA was not reconciling data between systems to detect discrepancies, which could lead to payment errors.

Second, the auditor identified deficiencies in internal control that, when aggregated, were considered to be a significant deficiency in internal controls related to redeterminations. Testing

identified instances where redetermination interviewers did not comply with established control policies, and results were not appropriately recorded.

Third, the auditor identified information systems control deficiencies in four areas that, when aggregated, were considered to be a significant deficiency over information systems controls. The areas included:

- Threat and Vulnerability Management;
- IT Oversight and Governance;
- Change Management; and
- Access Controls.

**SSA's Anti-Fraud Programs:** SSA is under increased scrutiny after a number of highly publicized cases of fraud became the subject of congressional hearings. OIG hired a contractor to complete a fraud risk assessment of SSA's anti-fraud activities and found that SSA did not track all instances of fraud or use a risk-based approach for combatting fraud. The contractor also concluded that the Agency could be more proactive in addressing and mitigating new fraud schemes and improving the design and operating effectiveness of anti-fraud measures.

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## MONETARY BENEFITS

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In FY 2015, OIG issued 89 audit reports with recommendations, identifying over \$4.1 billion in questioned costs and over \$3.6 billion in Federal funds that could be put to better use. OIG also received over 121,000 allegations of fraud, effected almost 1,300 criminal convictions, and obtained a return of over \$551 million in monetary accomplishments, comprised of over \$138 million in SSA recoveries, restitutions, fines, settlements, and judgments, and over \$413 million in projected SSA savings. Our FY 2017 funding will enable us to issue timely reports, provide training required by Government Auditing Standards, and cover mission-critical travel.

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## STRATEGIC PLANNING

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FY 2015 was the fifth year under OIG's 5-year Strategic Plan (FY 2011-FY 2015). OIG operates within a framework set by three general goals: the *Impact* OIG's investigations, audits, and legal activities have on SSA's effectiveness and efficiency; the *Value* OIG brings to SSA, Congress, and the public; and the strategies OIG uses to cultivate the talents of its *People*. These general goals are further broken down into 15 separate performance measures. All of these measures are designed to support OIG's core mission to inspire public confidence by detecting and preventing fraud, waste, and abuse in SSA's programs and operations. For FY 2015, OIG successfully met or exceeded all 15 of its performance measures. The specific results for FY 2015 are as follows:

**Table 4.2—2015 Performance Measure Results**

<b>Goal</b>	<b>Target</b>	<b>Result</b>
<b><i>Impact</i></b>		
1. Maintain an annual acceptance rate of at least 88% for all audit recommendations.	88%	<b>96%</b>
2. Achieve a 5-year average implementation rate of 85% for accepted recommendations aimed at improving the integrity, efficiency, and effectiveness of SSA.	85%	<b>88%</b>
3. Ensure at least 80% of all cases opened during the FY directly relate to improper payments within SSA's Title II and Title XVI Programs.	80%	<b>96%</b>
4. Achieve a successful conclusion on at least 75% of all Title II and Title XVI cases closed during the FY.	75%	<b>89%</b>
<b><i>Value</i></b>		
5. Generate a positive return of \$8 for every tax dollar invested in OIG activities.	\$8 to 1	<b>\$82 to 1</b>
6. Evaluate and respond to 90% of all allegations received within 45 days.	90%	<b>96%</b>
7. Complete investigative fieldwork on 75% of all cases within 180 days.	75%	<b>91%</b>
8. Respond to 95% of constituent-based congressional inquiries within 21 days.	95 %	<b>98%</b>
9. Take action on 90% of Civil Monetary Penalty (CMP) subjects within 30 days of receipt.	90%	<b>97%</b>
10. Achieve a positive external user assessment rating of 85% for product service quality.	85%	<b>94%</b>
11. Issue 85% of final audit reports within 1 year of the entrance conference with SSA.	85%	<b>91%</b>
12. Complete 85% of requests for legal advice and review within 30 days.	85%	<b>99%</b>
<b><i>People</i></b>		
13. Achieve an annual attrition rate of 5% or less.	≤5 %	<b>1%</b>
14. Conduct an annual employee job-satisfaction survey and implement corrective action plans to identify areas where improvements are needed. (Improvement is indicated when the score of any of the 12 questions relating to job satisfaction is ≤ 75%.)	75%	<b>82%</b>
15. Ensure that 90% of OIG staff receives 40 or more hours of appropriate developmental and skill enhancement training annually.	90%	<b>99%</b>

### TRANSFER AUTHORITY

The budget request includes language providing authority to transfer an amount of up to 3 percent of the total OIG appropriation from SSA's LAE appropriation. This language provides the flexibility to meet unanticipated funding requirements and to ensure that adequate resources are available to meet program objectives. The request is consistent with similar authority to transfer funds between appropriations provided to other departments and agencies in appropriation language.

## BUDGETARY RESOURCES

The OIG annual appropriation consists of appropriations from both the general fund and the trust funds. The President's budget request for FY 2017 consists of \$31,000,000 appropriated from the general fund and \$81,000,000 which will be transferred and expended as authorized by Section 201(g) (1) of the Social Security Act from the Federal Old-Age and Survivors Insurance Trust Fund and the Federal Disability Insurance Trust Fund.

**Table 4.3—Amounts Available for Obligation**

	(In thousands)		
	FY 2015 Actual	FY 2016 Enacted	FY 2017 Estimate
General Funds Annual Appropriation	\$ 28,829	\$ 29,787	\$ 31,000
Trust Funds Annual Transfer	\$ 74,521	\$ 75,713	\$ 81,000
<b>Total Appropriation</b>	<b>\$ 103,350</b>	<b>\$ 105,500</b>	<b>\$ 112,000</b>
<b>Total Budgetary Resources</b>	<b>\$ 103,350</b>	<b>\$ 105,500</b>	<b>\$ 112,000</b>
Total Obligations	\$ 102,576	\$ 105,500	\$ 112,000
Unobligated balance lapsing	\$ 774	\$ 0	\$ 0

## ANALYSIS OF CHANGES

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The FY 2017 request represents a \$6,500,000 increase over the FY 2016 estimate. These increases can be attributed to an increase in base expenses for employee salaries and benefits, to include a proposed pay increase and for related support costs.

**Table 4.4—Summary of Changes**

	<b>FY 2016 Enacted</b>	<b>FY 2017 Estimate</b>	<b><i>FY16 to FY17 Change</i></b>
General Fund Appropriation	\$ 29,787,000	\$ 31,000,000	+ \$ 1,000,000
Trust Fund Appropriation	\$ 75,713,000	\$ 81,000,000	+ \$ 5,500,000
<b>Total Appropriation</b>	<b>\$ 105,500,000</b>	<b>\$ 112,000,000</b>	<b>+ \$ 6,500,000</b>
<b>Total Obligations</b>	<b>\$ 105,500,000</b>	<b>\$112,000,000</b>	<b>+ \$ 6,500,000</b>



Table 4.5—Explanation of OIG Budget Changes

	FY 2016 Base		Change from Base	
	WYs (FTEs)	Budgetary Resources	WYs (FTEs)	Budgetary Resources
<b><u>BUILT-IN INCREASES</u></b>				
<b>Base Payroll Expenses</b>	<b>543 (540)</b>		<b>+21 (+20)</b>	
• <i>Change in base payroll expenses related to career ladder promotions and within-grade increases</i>	---	\$ 67,482,000	---	+ \$ 2,657,000
• <i>Change in base expenses for employee benefits including health benefits and new employees hired under the Federal Retirement Employees System</i>	---	\$ 24,959,000	---	+ \$ 983,000
• <i>All other payroll changes, including overtime and awards</i>	---	---	---	---
<b>Non-Payroll Costs - All other built-in nonpayroll changes, travel management support and equipment</b>	---	\$ 8,024,000	---	+\$3,020,000
• <b>Rent</b>	---	\$ 4,787,000	---	---
• <b>CIGIE Contribution</b>	---	\$248,000	---	+\$5,000
<b>Subtotal, Built-in increases</b>	<b>543 (540)</b>	<b>\$ 105,500,000</b>	<b>+21 (+20)</b>	<b>+\$6,665,000</b>
<b><u>PROGRAM INCREASES</u></b>				
<b>Increase for operations and maintenance of facilities and equipment</b>	---	---	---	\$ 0
<b>Subtotal, Program Increases</b>	---	---	---	\$ 0
<b>Total Increases</b>	<b>543 (540)</b>	<b>\$ 105,500,000</b>	<b>+21 (+20)</b>	<b>+\$6,665,000</b>

Table Continues on the Next Page

	FY 2016 Base		Change from Base	
	WYs (FTEs)	Budgetary Resources	WYs (FTEs )	Budgetary Resources
<b><u>BUILT-IN DECREASES</u></b>				
<b>Base Payroll Expenses</b> —Decrease in all other payroll costs	<b>543 (540)</b>	<b>\$ 92,441,000</b>	<b>+2 1</b>	<b>---</b>
<b>Non-Payroll Costs</b>	<b>---</b>	<b>\$ 8,024,000</b>	<b>--</b>	<b>---</b>
<b>Rent</b>	<b>---</b>	<b>\$ 4,787,000</b>	<b>--</b>	<b>-\$165,000</b>
<b>CIGIE Contribution</b>	<b>---</b>	<b>\$ 248,000</b>	<b>--</b>	<b>---</b>
<b>Subtotal, Built-in decreases</b>	<b>---</b>	<b>\$ 105,500,000</b>	<b>--</b>	<b>-\$165,000</b>
<b><u>PROGRAM DECREASES</u></b>				
<b>Decrease in costs for training, other support, services, and supplies</b>	<b>---</b>	<b>---</b>	<b>--</b>	<b>---</b>
<b>Subtotal, Program Decreases</b>	<b>---</b>	<b>---</b>	<b>--</b>	<b>---</b>
<b>Total Decreases</b>	<b>---</b>	<b>\$ 105,500,000</b>		<b>-\$165,000</b>
<b>Net Change</b>	<b>543 (540)</b>	<b>\$ 105,500,000</b>	<b>+2 1 (+2)</b>	<b>+\$ 6,500,000</b>

## BUDGET AUTHORITY BY ACTIVITY

---

The table below displays budget authority, split by type of funding, and obligations. This table also includes FTEs.

**Table 4.6—Budget Authority by Activity**

	(In thousands)		
	FY 2015 Actual	FY 2016 Enacted	FY 2017 Estimate
General Funds	\$ 28,829	\$ 29,787	\$31,000
OASDI Trust Fund Transfers	\$ 74,521	\$ 75,713	\$ 81,000
<b>Total Appropriation</b>	<b>\$ 103,350</b>	<b>\$ 105,500</b>	<b>\$ 112,000</b>
<b>Total Budgetary Authority</b>	<b>\$ 103,350</b>	<b>\$ 105,500</b>	<b>\$ 112,000</b>
Obligations	\$ 102,576	\$ 105,500	\$ 112,000
Unobligated balance lapsing	\$ 774	\$ 0	\$ 0
FTEs	528	540	560

## BUDGET RESOURCES BY OBJECT

The table below displays the breakdown of budget resources by object class.

**Table 4.7—Budget Resources by Object**

	FY 2015	FY 2016	FY 2017	<i>FY16 to FY17 Change</i>
Full-time permanent	\$ 62,982,000	\$ 66,884,000	\$ 69,541,000	+ \$ 2,657,000
Other than full-time permanent	\$ 395,000	\$ 400,000	\$ 400,000	\$ 0
Other compensation	\$ 197,000	\$ 198,000	\$ 198,000	\$ 0
Subtotal, Personnel Compensation	\$ 64,574,000	\$ 67,482,000	<b>\$ 70,139,000</b>	+ \$ 2,657,000
Civilian personnel benefits	\$ 26,147,000	\$ 24,959,000	\$ 25,942,000	+\$ 983,000
Total, Compensation and Benefits	\$ 89,721,000	\$ 92,441,000	<b>\$ 96,081,000</b>	+ \$ 3,640,000
Travel	\$ 2,598,000	\$ 2,293,000	\$ 3,010,000	+\$ 717,000
Transportation of things	\$ 32,000	\$ 50,000	\$ 60,000	+\$ 10,000
Rental payments to GSA	\$ 4,631,000	\$ 4,563,000	\$ 4,354,000	- \$209,000
Rental payments to others	\$ 77,000	\$ 100,000	\$ 144,000	+ \$44,000
Communications, utilities, and others	\$ 266,000	\$ 124,000	\$ 124,000	\$ 0
Printing and reproduction	\$ 13,000	\$ 6,000	\$ 6,000	\$ 0
Other services	\$ 3,260,000	\$4,923,000	\$ 6,136,000	+ \$ 1,213,000
Supplies and materials	\$ 245,000	\$ 519,000	\$ 1,070,000	+ \$ 551,000
Equipment	\$ 1,988,000	\$ 747,000	\$ 1,281,000	+ \$ 534,000
Insurance Claims	\$ 0	\$ 1,000	\$ 1,000	\$ 0
Adjustments	-\$ 254,000	-\$ 267,000	-\$ 267,000	\$ 0
<b>Total Budgetary Resources</b>	<b>\$ 102,576,000</b>	<b>\$ 105,500,000</b>	<b>\$ 112,000,000</b>	<b>+ \$ 6,500,000</b>

**BACKGROUND**

**AUTHORIZING LEGISLATION**

The Office of the Inspector General is authorized necessary expenses to carry out the provisions of the Inspector General Act of 1978, as amended.

**Table 4.8—Authorizing Legislation**

	<b>FY 2016 Authorized</b>	<b>FY 2016 Enacted</b>	<b>FY 2017 Authorized</b>	<b>FY 2017 Estimate</b>
<b>Office of the Inspector General (P.L. 114-113)</b>	<b>\$ 105,500,000</b>	<b>\$ 105,500,000</b>	<b>Indefinite</b>	<b>\$ 112,000,000</b>

## APPROPRIATION HISTORY

The table below displays the President's budget request, amounts passed by the House and Senate, and the actual amount appropriated for the period FY 2004 to FY 2016.

**Table 4.9—Appropriation History Table**

<b>Fiscal Year</b>	<b>Budget Estimate to Congress</b>	<b>House Committee Passed</b>	<b>Senate Committee Passed</b>	<b>Enacted Appropriation</b>
General Funds	\$ 25,000,000	\$ 24,500,000	\$ 20,863,000	<b>\$ 24,355,400</b>
Trust Funds	\$ 65,000,000	\$ 63,700,000	\$ 61,597,000	<b>\$ 63,324,200</b>
2004 Total	\$ 90,000,000	\$ 88,200,000 <sup>1</sup>	\$ 82,460,000 <sup>2</sup>	<b>\$ 87,679,600<sup>3</sup></b>
General Funds	\$ 26,000,000	\$ 25,748,000	\$ 26,000,000	<b>\$ 25,542,000</b>
Trust Funds	\$ 66,000,000	\$ 65,359,000	\$ 66,000,000	<b>\$ 64,836,100</b>
2005 Total	\$ 92,000,000	\$ 91,107,000 <sup>4</sup>	\$ 92,000,000 <sup>5</sup>	<b>\$ 90,378,100<sup>6</sup></b>
General Funds	\$ 26,000,000	\$ 26,000,000	\$ 26,000,000	<b>\$ 25,740,000</b>
Trust Funds	\$ 67,000,000	\$ 66,805,000	\$ 67,000,000	<b>\$ 65,736,000</b>
2006 Total	\$ 93,000,000	\$ 92,805,000 <sup>7</sup>	\$ 93,000,000 <sup>8</sup>	<b>\$ 91,476,000<sup>9</sup></b>
General Funds	\$ 27,000,000	\$ 26,435,000	\$ 25,740,000	<b>\$ 25,902,000</b>
Trust Funds	\$ 69,000,000	\$ 67,976,000	\$ 65,736,000	<b>\$ 66,149,000</b>
2007 Total	\$ 96,000,000	\$ 94,411,000 <sup>10</sup>	\$ 91,476,000 <sup>11</sup>	<b>\$ 92,051,000<sup>12</sup></b>
General Funds	\$ 27,000,000	\$ 27,000,000	\$ 28,000,000	<b>\$ 25,988,901</b>
Trust Funds	\$ 68,047,000	\$ 68,047,000	\$ 68,047,000	<b>\$ 65,926,000</b>
2008 Total	\$ 95,047,000	\$ 95,047,000 <sup>13</sup>	\$ 96,047,000 <sup>14</sup>	<b>\$ 91,914,901<sup>15</sup></b>
General Funds	\$ 28,000,000	--	\$ 28,000,000	<b>\$ 28,000,000</b>
Trust Funds	\$ 70,127,000	---	\$ 70,127,000	<b>\$ 70,127,000</b>
2009 Total	\$ 98,127,000	--- <sup>16</sup>	\$ 98,127,000 <sup>17</sup>	<b>\$ 98,127,000<sup>18</sup></b>
ARRA <sup>19</sup>	N/A	N/A	N/A	<b>\$ 2,000,000</b>
General Funds	\$ 29,000,000	\$ 29,000,000	\$ 29,000,000	<b>\$ 29,000,000</b>
Trust Funds	\$ 73,682,000	\$ 73,682,000	\$ 73,682,000	<b>\$ 73,682,000</b>
2010 Total	\$ 102,682,000	\$ 102,682,000 <sup>20</sup>	\$ 102,682,000 <sup>21</sup>	<b>\$ 102,682,000<sup>22</sup></b>
General Funds	\$ 30,000,000	---	\$ 30,000,000	<b>\$ 28,942,000</b>
Trust Funds	\$ 76,122,000	---	\$ 76,122,000	<b>\$ 73,535,000</b>
2011 Total	\$ 106,122,000	--- <sup>23</sup>	\$ 106,122,000 <sup>24</sup>	<b>\$ 102,477,000<sup>25</sup></b>
General Funds	\$ 30,000,000	---	\$ 28,942,000	<b>\$ 28,887,000</b>
Trust Funds	\$ 77,113,000	---	\$ 73,535,000	<b>\$ 73,396,000</b>
2012 Total	\$ 107,113,000	--- <sup>26</sup>	\$ 102,477,000 <sup>27</sup>	<b>\$ 102,283,000<sup>28</sup></b>
General Funds	\$ 30,000,000	---	\$ 28,887,000	<b>\$ 27,376,000</b>
Trust Funds	\$ 77,600,000	---	\$ 73,396,000	<b>\$ 72,557,000</b>
2013 Total	\$ 107,600,000	--- <sup>29</sup>	\$ 102,283,000 <sup>30</sup>	<b>\$ 99,933,000<sup>31</sup></b>
General Funds	\$ 30,000,000	---	\$ 29,689,000	<b>\$ 28,829,000</b>
Trust Funds	\$ 75,733,000	---	\$ 74,972,000	<b>\$ 73,249,000</b>
2014 Total	\$ 105,733,000	---	\$ 104,670,000 <sup>32</sup>	<b>\$ 102,078,000<sup>33</sup></b>

<b>Fiscal Year</b>	<b>Budget Estimate to Congress</b>	<b>House Committee Passed</b>	<b>Senate Committee Passed</b>	<b>Enacted Appropriation</b>
General Funds	\$29,000,000	\$28,829,000		<b>\$ 29,000,000</b>
Trust Funds	\$75,622,000	\$74,249,000		<b>\$ 74,350,000</b>
2015 Total	\$104,622,000	\$103,078,000 <sup>34</sup>		<b>\$103,350,000<sup>35</sup></b>
General Funds	\$31,000,000	\$30,000,000	\$28,829,000	<b>\$ 29,787,000</b>
Trust Funds	\$78,795,000	\$78,795,000	\$74,521,000	<b>\$ 75,713,000</b>
2016 Total	\$109,795,000	\$108,795,000 <sup>36</sup>	\$103,350,000 <sup>37</sup>	<b>\$105,500,000<sup>38</sup></b>
General Funds	\$31,000,000			
Trust Funds	\$81,000,000			
2017 Total	\$112,000,000			

<sup>1</sup> H.R. 2660.

<sup>2</sup> S. 1356.

<sup>3</sup> Consolidated Appropriations Act, 2004 (P.L. 108-199). The \$24,500,000 in general funds and \$63,700,000 in trust funds included in the language for this account for FY 2004 were reduced by \$144,600 and \$375,800, respectively, in accordance with P.L. 108-199.

<sup>4</sup> H.R. 5006.

<sup>5</sup> S. 2810.

<sup>6</sup> Consolidated Appropriations Act, 2005 (P.L. 108-447). The \$25,748,000 in general funds and \$65,359,000 in trust funds included in the language for this account for FY 2005 were reduced by \$206,000 and \$522,900, respectively, in accordance with P.L. 108-447.

<sup>7</sup> H.R. 3010.

<sup>8</sup> H.R. 3010, reported from Committee with an amendment.

<sup>9</sup> Departments of Labor, Health and Human Services, and Education, and Related Agencies Appropriations Act, 2006 (P.L. 109-149). The \$26,000,000 in general funds and \$66,400,000 in trust funds included in the language for this account for FY 2006 were reduced by \$260,000 and \$664,000, respectively, in accordance with the Emergency Supplemental Appropriations Act to Address Hurricanes in the Gulf of Mexico and Pandemic Influenza, 2006 (P.L. 109-148).

<sup>10</sup> H.R. 5647.

<sup>11</sup> S. 3708.

<sup>12</sup> Revised Continuing Appropriations Resolution, 2007 (P.L. 110-5).

<sup>13</sup> H.R. 3043.

<sup>14</sup> S. 1710.

<sup>15</sup> Consolidated Appropriations Act, 2008 (P.L. 110-161). The \$26,451,000 in general funds and \$67,098,000 in trust funds included in the language for this account for FY 2008 were reduced by \$462,099 and \$1,172,000 respectively, in accordance with P.L. 110-161.

<sup>16</sup> The House Committee on Appropriations did not report a bill.

<sup>17</sup> S. 3230.

<sup>18</sup> Omnibus Appropriations Act, 2009 (P.L. 111-8).

<sup>19</sup> OIG received \$2,000,000 through the American Recovery and Reinvestment Act of 2009 (P.L. 111-5). OIG will conduct necessary oversight and audit of SSA programs, projects, and activities, assessing whether SSA used the resources as intended by the Act, and will identify any instances of fraud, waste, error, and abuse.

<sup>20</sup> H.R. 3293.

<sup>21</sup> H.R. 3293, reported from Committee with an amendment.

<sup>22</sup> Consolidated Appropriations Act, 2010 (P.L. 111-117).

<sup>23</sup> The House Committee on Appropriations did not report a bill.

<sup>24</sup> S. 3686.

<sup>25</sup> Department of Defense and Full-Year Continuing Appropriations Act, 2011 (P.L. 112-10). The \$29,000,000 in general funds and \$73,682,000 in trust funds included in the language for this account for FY 2011 were reduced by \$58,000 and \$147,000 respectively, in accordance with P.L. 112-10.

<sup>26</sup> The House Committee on Appropriations did not report a bill. Appropriations Chairman Rehberg introduced H.R. 3070, which included \$30,000,000 from general funds and \$77,113,000 from trust funds, totaling \$107,113,000.

<sup>27</sup> S. 1599.

<sup>28</sup> Consolidated Appropriations Act, 2012 (P.L. 112-74). The \$28,942,000 in general funds and \$73,535,000 in trust funds included in the language for this account for FY 2012 were reduced by \$55,000 and \$139,000 respectively, in accordance with P.L. 112-74.

<sup>29</sup> The House Committee on Appropriations did not report a bill. The Committee posted a draft bill which included \$28,887,000 from general funds and \$77,600,000 from trust funds, totaling \$106,487,000.

<sup>30</sup> S. 3295.

<sup>31</sup> Consolidated Appropriations Act, 2013 (P.L. 113-6). The \$69,557,000 in trust funds included in the language for this account for FY 2013 were increased by \$3,000,000 to \$72,557,000 as a transfer from SSA to OIG.

<sup>32</sup> S. 1284.

<sup>33</sup> Consolidated Appropriations Act, 2014 (P.L. 113-76).

<sup>34</sup> H.R. 5464.

<sup>35</sup> Consolidated Appropriations Act, 2015 (P.L. 113-235).

<sup>36</sup> H.R. 3020

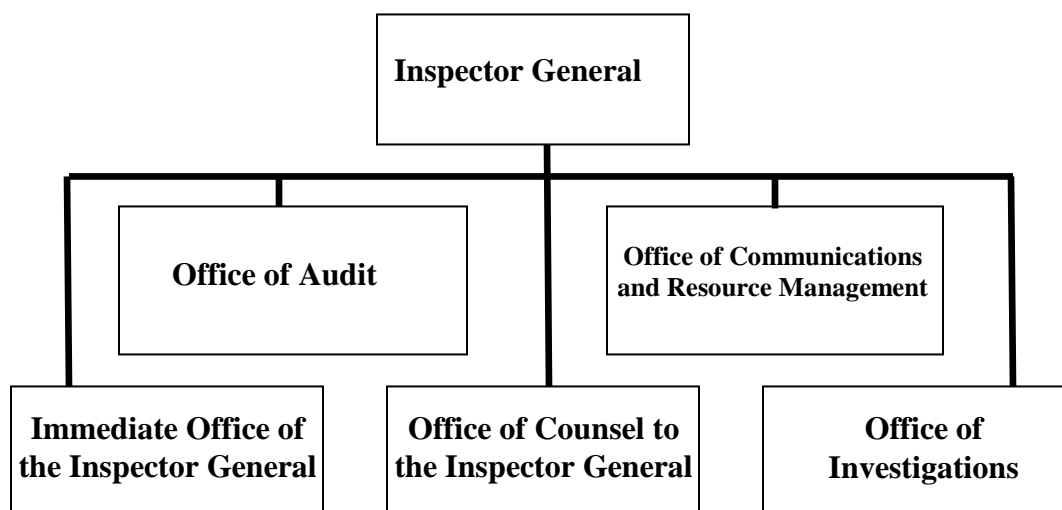
<sup>37</sup> S. 1695.

<sup>38</sup> Consolidated Appropriations Act, 2016 (P.L. 114-113).



## OIG'S ORGANIZATIONAL STRUCTURE AND MISSION

### GENERAL PURPOSE



As mandated by the *Inspector General Act of 1978*, as amended, OIG's mission is to protect the integrity of SSA's programs. By conducting independent and objective audits, evaluations, and investigations, OIG works to ensure public confidence in the integrity and security of SSA's programs and operations, and works to protect them against fraud, waste, and abuse. OIG provides timely, useful, and reliable information and advice to Administration officials, Congress, and the public.

OIG is comprised of five components: The Immediate Office of the Inspector General (IO), Office of Audit (OA), Office of Counsel to the Inspector General (OCIG), Office of Communications and Resource Management (OCRM), and the Office of Investigations (OI).

### Immediate Office of the Inspector General

IO provides the Inspector General (IG) and the Deputy IG with staff assistance on the full range of their responsibilities. IO also administers a comprehensive Quality Assurance and Professional Responsibility program, and conducts Quality Control reviews that ensure the adequacy of OIG compliance with its policies and procedures, internal controls, and professional standards. In addition, IO oversees the Organizational Health Committee (OHC). The purpose of the OHC is to be an agent of positive change by discussing, evaluating, and presenting to senior management employee issues and proposed solutions that affect the operations, administration, and efficiency of OIG. In doing this, the committee acts as a representative of all OIG employees.

## **Office of Audit**

OA conducts and/or supervises comprehensive financial and performance audits of SSA's programs and operations and makes recommendations to ensure that program objectives and operational functions are achieved effectively and efficiently. Financial audits, required by the *Chief Financial Officers' Act of 1990*, assess whether SSA's financial statements fairly present the agency's financial position, results of operations, and cash flow. Performance audits review the economy, efficiency, and effectiveness of SSA's programs and operations. OA also conducts short-term management and program evaluations focused on issues of concern to SSA, Congress, and the general public. Evaluations often focus on identifying and recommending ways to prevent and minimize program and operational fraud, waste, and abuse, as well as inefficiency and ineffectiveness.

## **Office of Counsel to the Inspector General**

OCIG provides independent authoritative legal advice, guidance, and counsel to the IG and senior staff on a wide range of issues, including regulatory strategy, policy directives, and interpretation of new and emerging authorities and agency responsibilities. OCIG reviews materials to ensure sufficiency and compliance with regulatory and statutory requirements. OCIG advises the IG on investigative procedures and techniques, as well as on legal implications and conclusions to be drawn from audit and investigative material. OCIG is also responsible for the CMP program, including imposition of penalties and assessments and the settlement and litigation of CMP cases.

## **Office of Communications and Resource Management**

OCRM provides administrative and management support to OIG by providing information resource management; systems security and software development; and the coordination of budget, procurement, telecommunications, facilities, equipment, and human resources activities. OCRM also administers the Fugitive Felon Program and the OIG Fraud Hotline. OCRM also manages OIG's public affairs programs, develops OIG's media and public information policies, and serves as the primary contact for those seeking information about OIG. In addition, OCRM is responsible for strategic planning, organizational performance management, and reporting.

## **Office of Investigations**

OI conducts and coordinates investigative activity related to fraud, waste, abuse, and mismanagement in SSA programs and operations, including wrongdoing by individuals such as applicants, grantees, or contractors perpetrating criminal activity against SSA programs and operations. OI is responsible for managing DFT and administering the CDI Program. OI also investigates allegations of employee misconduct in the performance of their official duties. This office serves as the OIG liaison to the Department of Justice on all matters relating to investigations of SSA programs and personnel. OI works with other investigative agencies and organizations on special projects and assignments.

## RATIONALE FOR THE BUDGET REQUEST

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The budget request for FY 2017 is \$112,000,000 and 560 FTEs, which reflects an increase of \$6,500,000 from the FY 2016 annual appropriations level. The FY 2017 funding increase will provide funding for a 560 FTE staffing level, mandatory payroll increases (such as within-grade increases and benefit-rate increases), and for related support costs.

**Table 4.10—Detail of Full-Time Equivalent Employment and Workyears**

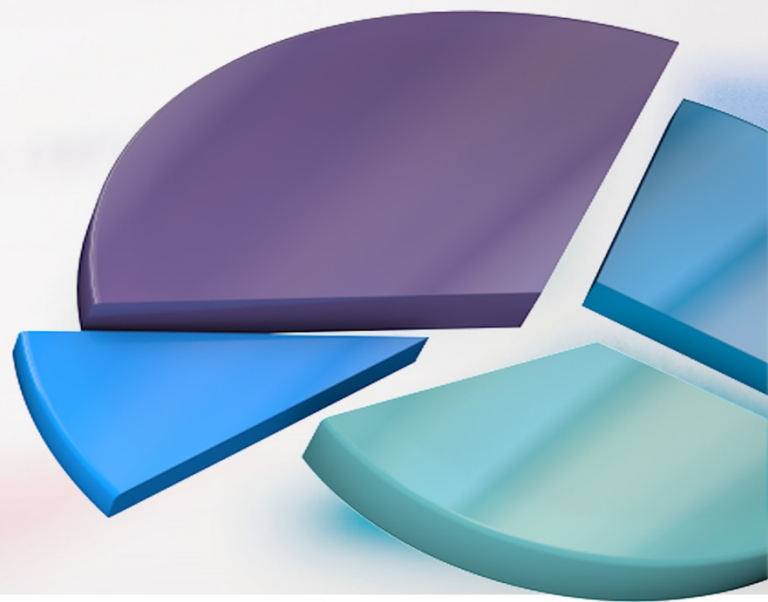
	<b>FY 2015 Actual</b>	<b>FY 2016 Estimate</b>	<b>FY 2017 Estimate</b>
FTEs	528	540	560
Overtime/Lump Sum Leave	5	3	4
<b>Total</b>	<b>533</b>	<b>543</b>	<b>564</b>

**Table 4.11—Average Grade and Salary**

	<b>FY 2015 Actual</b>
Average ES Salary	\$ 173,107
Average GS Grade	13
Average GS Salary	\$ 103,979



Social Security Administration  
**Annual  
Performance  
Report**  
2015-2017



**Annual Performance Plan** for Fiscal Year 2017  
**Revised Performance Plan** for Fiscal Year 2016  
**Annual Performance Report** for Fiscal Year 2015

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# Acting Commissioner's Message



Transformation and reflection marked this year as we released [Vision 2025](#) and celebrated our 80<sup>th</sup> anniversary. We asked ourselves, “How do we take the best of our past and weave it into an agile, innovative organization capable of meeting our customers’ needs now and into the future?”

Throughout this *Annual Performance Plan for Fiscal Year 2017, Revised Performance Plan for Fiscal Year 2016, and Annual Performance Report for Fiscal Year 2015*, we detail the specific actions underway to transform our agency to meet our future demands. These actions support the goals and objectives defined in our [Agency Strategic Plan for Fiscal Years 2014 – 2018](#) and align with our three vision priorities: providing a superior customer experience, developing and retaining exceptional employees, and building an innovative organization.

As we move into the future, our customers remain our number one priority. Our customers often seek our help when they are most vulnerable. It is our responsibility to provide them with compassionate, accurate service as quickly as we can. We rely on our outstanding employees to provide that service. Every day, I see evidence of their commitment, and I thank these amazing, dedicated public servants for all that they do to serve the public.

Looking toward the future, technology offers us extraordinary opportunities to improve our decision-making processes. To help ensure we are gathering and interpreting the vast array of data available to us, I have established a new Analytics Center of Excellence. We will staff the new center with highly skilled business and data analytics staff that will provide critical analysis as we accelerate data driven-decision making throughout our agency.

As our employees work to meet our customers’ needs, we also face the reality that some individuals seek to commit fraud or breach our computer systems for personal gain. We will not tolerate these actions and will prosecute those responsible. We aggressively combat fraud, and this year, we centralized our efforts by establishing the Office of Anti-Fraud Programs. This office uses various approaches, including data analytics, to help us detect and prevent fraud. We also continue to invest heavily in our cyber security programs, further demonstrating our commitment to protecting our customers’ personal data by meeting or exceeding federal cyber security standards.

Over the past year, we made great strides to move our agency forward. I am proud to report that we met or made significant progress toward all 40 of our fiscal year (FY) 2015 performance measures. Last year, I challenged our leadership to be aggressive in their goal setting. While not all targets were met, I am pleased with our progress and with the hard work employees at all levels demonstrated in doing their best to meet those goals.

We established new agency priority goals for FY 2016-2017, which focus on agency issues:

- Improving customer service and convenience by increasing online services;
- Increasing customer satisfaction with our services;
- Improving the integrity of our programs; and
- Improving customer service by reducing the wait time for a hearing decision.

We have also faced challenges, which we explain in our [Major Management Challenges](#) section. This report also details our progress, notes any changes made to our FY 2016 plans, provides our new measures and initiatives for FY 2017, and notes our risks and mitigation efforts.

In closing, based on internal evaluations, I assure you the performance data in this report is complete, reliable, and accurate.

A handwritten signature in black ink that reads "Carolyn W. Colvin".

Carolyn W. Colvin  
Acting Commissioner



# Chief Strategic Officer's Message



What will a customer's experience be with Social Security in 2025? Imagining the possibilities excited our customers, employees, and other stakeholders over the past year as we sought their input in developing our vision. Released in April 2015, [Vision 2025](#) describes the agency we aspire to be, and now we are developing a roadmap to guide our transformation into the bold, innovative agency we aspire to be.

Our current performance goals, defined in our [Agency Strategic Plan for Fiscal Years 2014 – 2018](#), guide us through 2018. To achieve our vision, we are fine-tuning the initiatives supporting our objectives by focusing our resources on several actions we are referring to as major management priorities. These priorities are enhancing online customer service, reducing the hearings pending, educating the public about Social Security programs, improving succession management, promoting employee development and engagement, transforming the information technology investment process, establishing a program management office, and accelerating the use of data-driven decision-making. Progress in these areas builds a strong foundation for achieving our vision.

Throughout this *Annual Performance Report*, we detail the progress we have achieved toward meeting our goals and objectives, which also supports our major management priorities. Last year, Acting Commissioner Colvin challenged us to set aggressive targets for FY 2015, and we did. I am pleased to say that we met the target for 23 of our 40 performance measures. Results for three of our performance measures were unavailable at the time we published this report. We came very, very close to meeting the targets for the remaining 14 performance measures. Our targets reflect the level of progress we strive to make, not the progress we know we can easily make.

Highlights of our FY 2015 performance include:

- Improved and expanded service delivery options for customers to conduct business in person, by phone, through video interviews and hearings, or online, as evidenced by increased usage of all delivery channels;
- Developed additional aggressive program integrity and fraud prevention efforts, including setting up a new office overseeing our anti-fraud programs;
- Increased the quality of our disability decisions and received our second prestigious Deming Award – again, for specialized training we developed for our hearings staff;
- Exceeded our FY 2015 systems availability target of 99.5 percent;
- Helped our veterans and wounded warriors by delivering medical evidence to the Department of Veterans Affairs faster;
- Continued to dominate the top five positions in the Federal Government's customer satisfaction rankings with our online tools: Retirement Estimator and Extra Help with Medicare, which tied for first place ranking; and
- Continued to exceed our targets for hiring veterans and disabled veterans.

As we look to our future, *Vision 2025* paints a picture of a responsive, highly efficient, and streamlined organization. Becoming that organization requires an aggressive approach to gathering and analyzing agency data, then acting on those findings. By leveraging the power of data analytics, we can assess our progress, identify performance gaps, and allocate our resources effectively to make our vision a reality.

A handwritten signature in black ink that reads "Ruby L. Burrell".

Ruby Burrell  
Chief Strategic Officer

# Making our Vision a Reality

As the Nation's largest safety net, providing benefits to millions of Americans – and the sole income for many – we are entrusted with an enormous responsibility. We face many challenges as we look to the future – increasing numbers of retirees and disabled workers, an aging employee base, increased employee turnover, technological advances, budget uncertainty, and increased customer expectations. We must change the way we operate to meet and exceed our customers' needs in the future.

Over the past several months, we have actively sought out our customers and stakeholders, asking them to help shape the Social Security Administration of the future. The result is [Vision 2025](#), the framework guiding our strategic decisions over the next ten years. Since *Vision 2025*'s release in April 2015, we have been developing the action plans needed to make our vision a reality.

We will address our challenges by focusing on our three vision priorities:



**Superior Customer Experience:** Our customer relationships span a lifetime and are supported by accurate, real-time, and secure online services;



**Exceptional Employees:** Empowered, knowledgeable, compassionate, and engaged employees are proud to contribute in a flexible and rewarding environment; and



**Innovative Organization:** The Social Security Administration is a national model of organizational transformation, agility, and service excellence, built on continuous improvement and forward-thinking strategy.

In fiscal year (FY) 2015, we took the following steps to achieve *Vision 2025*:

- Aligned our current [Agency Strategic Plan](#) with *Vision 2025*;
- Drafted our critical path roadmap defining the activities and initiatives we will undertake over the coming years to lay the foundation for achieving *Vision 2025*; and
- Began implementing initiatives supporting our major management priorities:
  - Enhance Online Customer Services;
  - Reduce the Wait for a Hearing Decision;
  - Educate the Public about Social Security Programs;
  - Improve Succession Management;
  - Promote Employee Development and Engagement;
  - Transform the IT Investment Process;
  - Establish Program Management Office; and
  - Accelerate the Use of Data-Driven Decision-Making.

In FY 2016, we expect to:

- Update our critical path roadmap, as needed;
- Begin developing our change management plan; and
- Continue implementing our initiatives.

In FY 2017, we expect to:

- Begin drafting our new agency strategic plan, based on our strategic roadmap.

Through careful strategic planning and continued dialog with our stakeholders, we will create a more agile, responsive organization, ready to meet the changing needs of our customers throughout their lifetimes.



# Our Mission

## Our Vision

Proudly serving Social Security customers through their lifetime, when and where they need us.

## Vision Priorities

- Superior Customer Experience
- Exceptional Employees
- Innovative Organization

## Our Mission

Deliver Social Security services that meet the changing needs of the public

## Our Motto

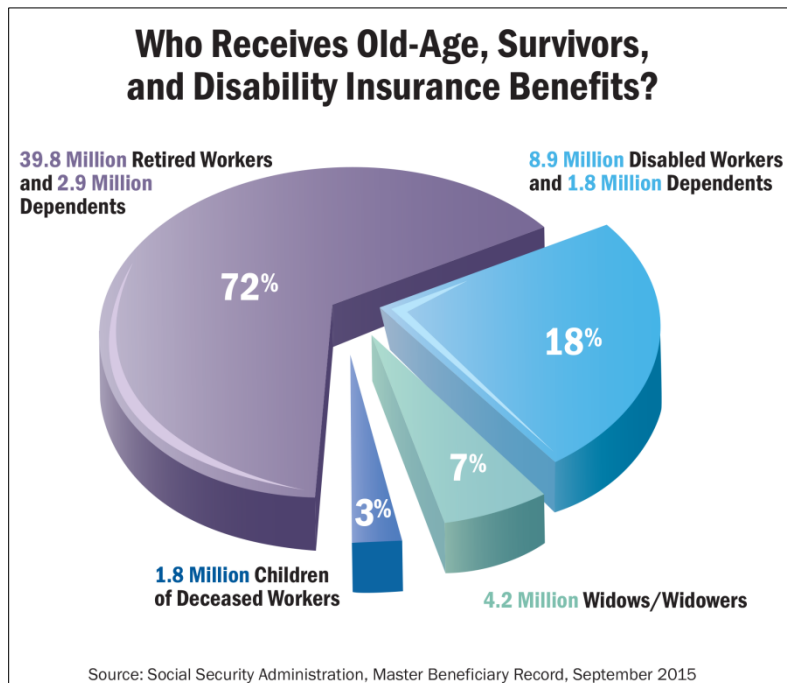
Social Security Benefits America

# Our Programs

## Americans Rely on Social Security

Considered by many to be one of the most successful large-scale federal programs in our Nation's history, the programs we administer provide a financial safety net for millions of Americans. In fact, 9 out of 10 individuals age 65 and older receive Social Security benefits. During fiscal year 2015, we paid more than \$932 billion to approximately 65 million beneficiaries.

## Old-Age, Survivors, and Disability Insurance Programs



## Old-Age and Survivors Insurance Program

Today, most retirees plan their retirement dates based on when they can receive their Social Security benefits. Created in 1935, the Old-Age and Survivors Insurance program (which provides what most people think of as their Social Security benefit) provides retirement and survivors benefits to qualified workers and their families. Workers earn credit toward Social Security benefits by working and paying Social Security taxes. Most people need 40 credits, or 10 years of covered work, to qualify for retirement benefits.

A worker qualifies for full retirement benefits between the ages of 65 and 67, depending on the year he or she was born. Reduced retirement benefits are payable as early as age 62. Certain members of retired workers' families may also receive benefits. Spouses (including divorced spouses), minor children, and children who became disabled before age 22 may also be eligible for benefits.

Social Security also provides income for families of workers who die. Survivors benefits were added in 1939, and benefits for disabled widows and widowers were added in 1968. Widows, widowers (and divorced widows and widowers), dependent parents, and children may be eligible for survivors benefits. In fact, 98 of every 100 children could get benefits if a working parent dies. Social Security pays more benefits to children than any other federal program.

## Disability Insurance Program

Becoming disabled before reaching full retirement age is not something most people consider. However, studies show that a 20-year-old worker has more than a 1-in-4 chance of becoming disabled before reaching full retirement age.

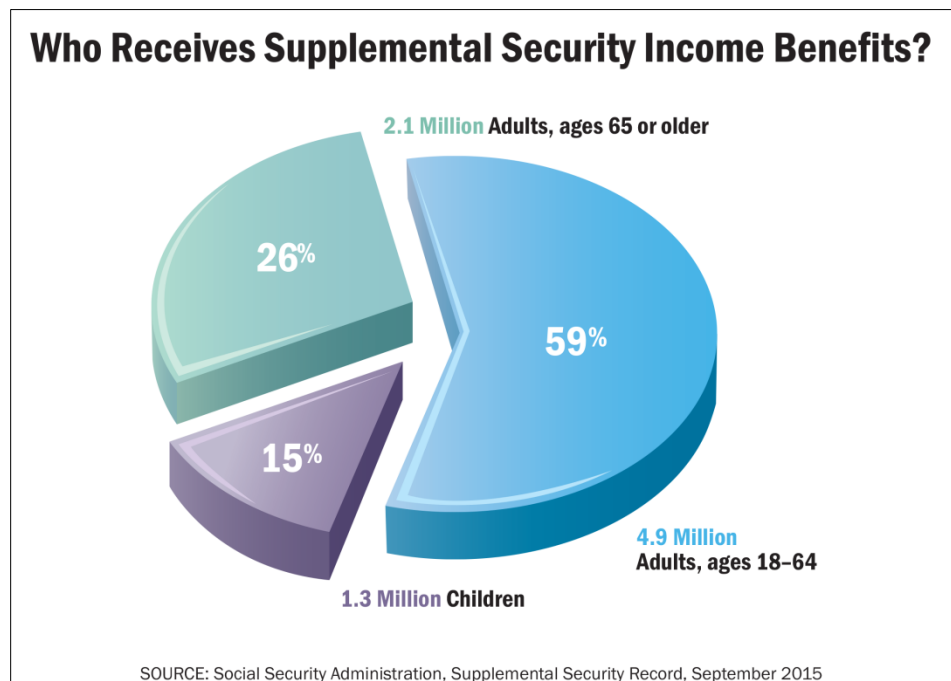
People who have worked long enough and paid Social Security taxes and certain members of their families can qualify for Social Security Disability Insurance benefits.

The disability program began in 1956 to provide benefits for workers with disabilities between the ages of 50 and full retirement. The program expanded in 1960 to include workers with disabilities of all ages. Social Security Disability Insurance provides benefits to people who cannot work because they have a medical condition expected to last at least one year or result in death.

## Supplemental Security Income Program

The Supplemental Security Income program, established in 1972, is a federal program providing monthly payments to people with limited incomes and resources who are aged, blind, or disabled. Adults and children under the age of 18 can receive payments based on disability or blindness.

General tax revenue, not workers' Social Security taxes, funds the Supplemental Security Income program.



# Our Organization

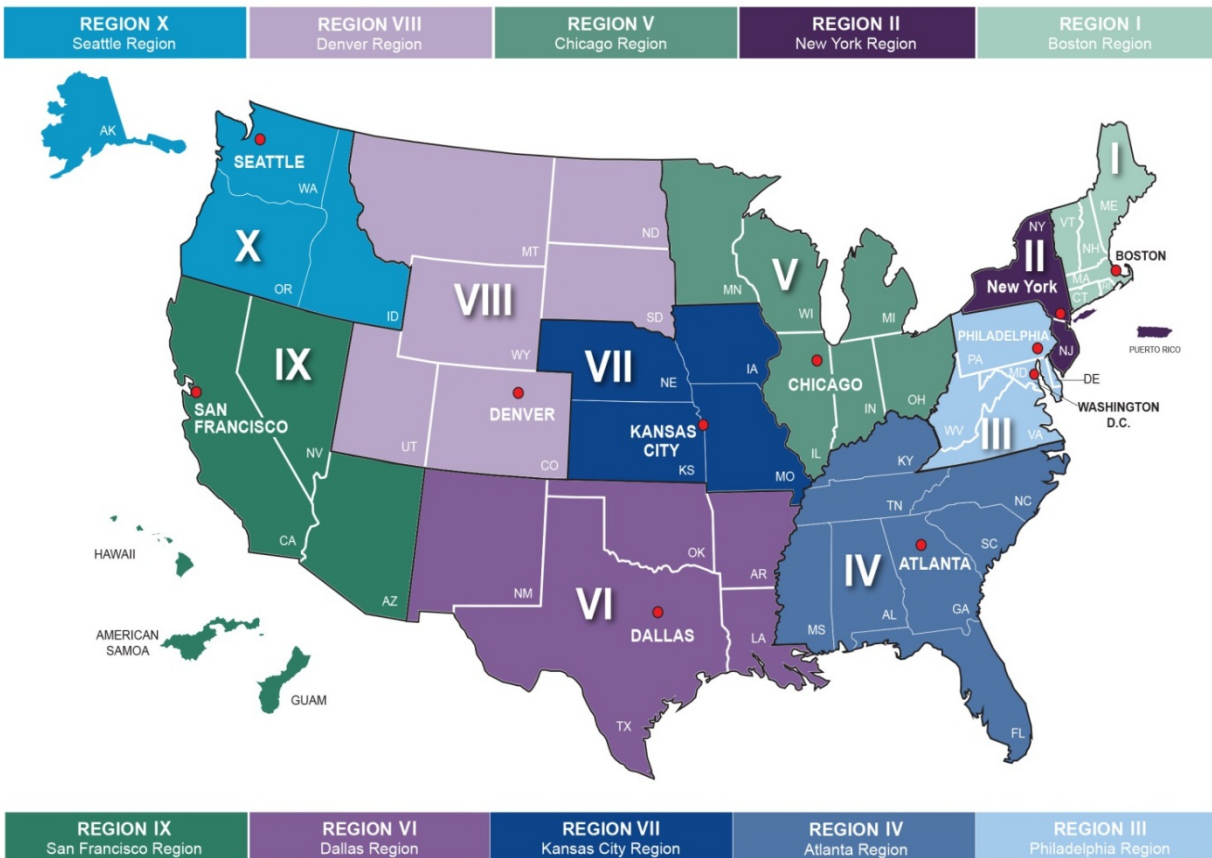
Serving the American public requires a vast network of facilities, technology, and skilled staff. Every day more than 65,000 employees provide a full range of services to our customers. Nationwide, we have a network of more than 1,500 offices, which includes regional offices, field offices, Social Security card centers, teleservice centers, processing centers, National Hearing Centers, the Appeals Council, and our headquarters in Baltimore, Maryland.

Additionally, more than 16,000 state employees at disability determination services (DDS) offices work in 54 jurisdictions and provide services in about 100 offices across the country and U.S. territories. Internationally, we deliver services in the U.S. embassies in more than a hundred countries.

Customers receive in-person service primarily at our field offices and Social Security card centers. Our teleservice centers primarily handle calls to our National 800 Number. Employees in our processing centers typically handle Social Security retirement, survivors, and disability payments. These employees also provide a wide range of other services, including handling telephone calls to our National 800 Number.

We have created strong partnerships with state agencies, and we depend on state employees in DDS offices to make disability determinations. Administrative law judges in our hearing offices and the administrative appeals judges at our Appeals Council decide appeals involving Social Security and Supplemental Security Income issues.

We generally organize our operations into the 10 regions shown on the map below. For more information about our components and their functions, visit our [organizational structure webpage](#).



# Summary of Our Goals and Objectives

## Goal 1: Deliver Innovative, Quality Services

- Strategic Objective 1.1: Develop and Increase the Use of Self-Service Options
- Strategic Objective 1.2: Enhance the Customer Experience by Completing Customers' Business at the First Point of Contact
- Strategic Objective 1.3: Partner with Other Agencies and Organizations to Improve Customers' Experience and Align with the Administration's One-Government Approach
- Strategic Objective 1.4: Evaluate Our Physical Footprint to Incorporate Improved Service Options

## Goal 2: Strengthen the Integrity of Our Programs

- Strategic Objective 2.1: Transform the Way We Record Earnings to Enhance Data Accuracy
- Strategic Objective 2.2: Protect the Public's Data and Provide Secure Online Services
- Strategic Objective 2.3: Increase Payment Accuracy

## Goal 3: Serve the Public through a Stronger, More Responsive Disability Program

- Strategic Objective 3.1: Improve the Quality, Consistency, and Timeliness of Our Disability Decisions
- Strategic Objective 3.2: Maximize Efficiencies throughout the Disability Program
- Strategic Objective 3.3: Enhance Employment Support Programs and Create New Opportunities for Returning Beneficiaries to Work

## Goal 4: Build a Model Workforce to Deliver Quality Service

- Strategic Objective 4.1: Attract and Acquire a Talented and Diverse Workforce that Reflects the Public We Serve
- Strategic Objective 4.2: Strengthen the Competency, Agility, and Performance of Our Workforce to Align with the Needs of the Public
- Strategic Objective 4.3: Foster an Inclusive Culture that Promotes Employee Well-Being, Innovation, and Engagement
- Strategic Objective 4.4: Enhance Planning and Alignment of Human Resources to Address Current and Future Public Service Needs

## Goal 5: Ensure Reliable, Secure, and Efficient Information Technology Services

- Strategic Objective 5.1: Maintain System Performance and the Continuity of Information Technology Services
- Strategic Objective 5.2: Enhance and Execute Plans to Modernize Our Systems
- Strategic Objective 5.3: Incorporate Innovative Advances in Service Delivery
- Strategic Objective 5.4: Continuously Strengthen Our Cyber Security Program

# Cross-Agency Priority Goals

Established by the Government Performance and Results (GPRA) Modernization Act of 2010, Cross-Agency Priority (CAP) goals accelerate progress on presidential priority areas. Multiple agencies actively collaborate to achieve results in these areas.

The Office of Management and Budget established CAP goals based on input from federal agencies and congressional committees. These goals reflect the President’s second-term priorities. The goals were announced in the FY 2015 budget and have a four-year timeframe. There are 15 CAP goals: 7 mission-oriented and 8 management-focused goals. Each CAP goal has two senior leaders – one within the Executive Office of the President and one within key delivery agencies. The Social Security Administration and Office of Management and Budget co-lead the Customer Service CAP goal.

GPRA Modernization Act of 2010 requires us to address CAP goals in the agency strategic plan, the annual performance plan, and the annual performance report. Below, we note examples showing our efforts supporting specific CAP goals. A listing of all CAP goals, plus additional information about the progress all agencies are making toward achieving the CAP goals is available at [performance.gov](http://performance.gov).

Mission-Oriented Goals	
Cybersecurity	<ul style="list-style-type: none"> <li>Continued to meet or exceed all target goals related to: <ul style="list-style-type: none"> <li>Trusted Internet Connection consolidation and capabilities;</li> <li>Information security continuous monitoring;</li> <li>Strong authentication; and</li> <li>Phishing and malware defense.</li> </ul> </li> <li>Expanded use of automation to identify security vulnerabilities, deviations, and inappropriate use.</li> </ul>
Climate Change (Federal Actions)	<ul style="list-style-type: none"> <li>Developed and implemented a comprehensive plan to meet renewable energy and federal efficiency targets; and</li> <li>Took appropriate actions to ensure we mitigate our agency’s effect on climate change.</li> </ul>
Insider Threat and Security Clearance	<ul style="list-style-type: none"> <li>Developed and implemented our insider threat plan; and</li> <li>Created additional oversight mechanisms to ensure data access is limited to authorized personnel.</li> </ul>
Management-Oriented Goals	
Customer Service	<ul style="list-style-type: none"> <li>Co-led federal efforts on customer service improvements, including: <ul style="list-style-type: none"> <li>Creating a Federal Government-wide customer service award program;</li> <li>Piloting a tool to gather customer feedback in select federal offices, including Social Security card centers; and</li> <li>Developing a Washington, DC-based Community of Practice to drive progress on key milestones.</li> </ul> </li> <li>Supported agency-level efforts, including: <ul style="list-style-type: none"> <li>Piloting a regional Customer Service Community of Practice in Denver, CO;</li> <li>Developing and Implementing an online request for a Social Security number replacement card;</li> <li>Launching a viewable/printable replacement Form 1099; and</li> <li>Leveraging leadership from across government to bring best practices, collaboration, and shared problem solving to our agency.</li> </ul> </li> </ul>
Smarter IT Delivery	<ul style="list-style-type: none"> <li>Launched efforts to expand hiring authority for digital service experts;</li> <li>Held events targeting small businesses to facilitate communications and information exchange with industry partners;</li> <li>Began transition to an Agile-based systems development approach;</li> <li>Expanded project management processes to integrate additional best practices; and</li> <li>Conducted additional Stat reviews and implemented lessons learned.</li> </ul>

## Management-Oriented Goals

Strategic Sourcing	<ul style="list-style-type: none"> <li>• Used the Federal Strategic Sourcing Initiatives to decrease costs for a variety of items, including: <ul style="list-style-type: none"> <li>○ Office supplies;</li> <li>○ Domestic delivery services;</li> <li>○ Laptops;</li> <li>○ Workstations; and</li> <li>○ Cell phone services.</li> </ul> </li> </ul>
Benchmark and Improve Mission-Support Operations	<ul style="list-style-type: none"> <li>• Established cost or efficiency benchmarks for: <ul style="list-style-type: none"> <li>○ Acquisition;</li> <li>○ Financial management;</li> <li>○ Human capital;</li> <li>○ Information technology management; and</li> <li>○ Real property.</li> </ul> </li> <li>• Worked with Chief Executive Officer Councils to: <ul style="list-style-type: none"> <li>○ Define and refine individual efficiency benchmarking metrics and collect agency-level data; and</li> <li>○ Collect and validate efficiency and effectiveness metrics.</li> </ul> </li> </ul>
Open Data	<ul style="list-style-type: none"> <li>• Developed and maintained an enterprise data inventory;</li> <li>• Made data easily available to the public;</li> <li>• Prioritized and released valuable data to the public;</li> <li>• Prevented inappropriate disclosure of sensitive information;</li> <li>• Added specific roles and responsibilities for certain types of open data deliverables; and</li> <li>• Regularly reached out to stakeholders to identify their data needs.</li> </ul>
People and Culture	<ul style="list-style-type: none"> <li>• Focused efforts on improving employee engagement including requiring all our components to develop and maintain action plans;</li> <li>• Implemented an Employee Engagement Community of Practice to share best practices and address challenges; and</li> <li>• Participated in several Office of Personnel Management projects, including: <ul style="list-style-type: none"> <li>○ Senior Executive Service reforms;</li> <li>○ Hiring reform forums;</li> <li>○ GovConnect (piloting our “SkillsConnect” under GovProject); and</li> <li>○ Interagency Rotation Program.</li> </ul> </li> </ul>

# Agency Priority Goals

In support of the Government Performance and Results Act (GPRA) Modernization Act of 2010, we established four Agency Priority goals (APG). The APGs are 24-month goals and reflect performance improvement priorities of our executive leadership, as well as those of the Administration.

Our APGs support our overarching strategic goals set forth in our [Agency Strategic Plan for Fiscal Years 2014 – 2018](#). Below, and on the following pages, are the APGs for fiscal years (FY) 2014 - FY 2015 and our new APGs for FY 2016 – FY 2017.

## Agency Priority Goals for FY 2014-FY 2015

FY 2014-FY 2015 Agency Priority Goals	Strategies to Achieve Priority Goals	External Factors	Goal Leader
Improve access to our services by increasing the number of citizens who complete their business with us online.	Migrate existing online services to the <a href="#">my Social Security</a> portal.  Work with external partners to promote direct access to online services.  Conduct a national marketing campaign targeted toward people approaching retirement age and current beneficiaries.	Availability of information technology resources to add additional services to the <a href="#">my Social Security</a> portal and expand direct access through external partners.  Stakeholder and advocacy groups acceptance of the <a href="#">my Social Security</a> portal.	Robin Sabatino Associate Commissioner, Office of Electronic Services and Technology, Office of Operations
Deliver a world-class customer experience by expanding the use of video technology to hold hearings.	Update systems and infrastructure to improve the quality of video hearings.  Increase marketing and educational information.  Pursue policy and business process changes to maximize efficiency.	Availability of information technology resources.  Stakeholder acceptance of video hearings.  Public reaction to regulatory changes regarding video hearings.	Donna Calvert Assistant Deputy Commissioner, Office of Disability Adjudication and Review
Provide the public with access to personalized information by increasing the number of established <a href="#">my Social Security</a> accounts.	Enhance services provided online through the <a href="#">my Social Security</a> portal.  Increase marketing and educational activities to promote <a href="#">my Social Security</a> .  Pilot quick-service customer service stations in field offices.  Increase number of customer service stations in external partner sites that provide the full suite of Social Security online services.	Budget constraints could affect our ability to migrate additional services to the <a href="#">my Social Security</a> portal and impede our ability to implement new features.	Robin Sabatino Associate Commissioner, Office of Electronic Services and Technology, Office of Operations



FY 2014-FY 2015 Agency Priority Goals	Strategies to Achieve Priority Goals	External Factors	Goal Leader
<p>Reduce the percentage of improper payments made under the Supplemental Security Income (SSI) program.</p>	<p>Increase the volume of our program integrity workloads.</p> <p>Enhance and expand use of technology to reduce improper payments.</p> <p>Pursue new initiatives and program improvements to the extent funding is available.</p> <p>Ensure that we design new initiatives to produce measurable outcomes through well-developed evaluation plans.</p>	<p>Dependence upon SSI recipients and deemors (i.e., those whose income and assets are considered for SSI eligibility and payment amount) timely reporting changes in income and resources.</p> <p>Increase in job growth may result in more SSI recipients working and not reporting their wages timely.</p> <p>Budgetary constraints determine the number of redeterminations we may conduct.</p>	<p>Shirleeta Stanton Associate Commissioner, Office of Income Security Programs, Office of Retirement and Disability Policy</p>

## Agency Priority Goals for FY 2016-FY 2017

FY 2016-FY 2017 Agency Priority Goals	Strategies to Achieve Priority Goals	External Factors	Goal Leader/Deputy Goal Leader
Improve customer service and convenience by increasing online services.	<p>Release new electronic services within the <i>my Social Security</i> portal, including enhanced customer engagement tools to assist users while they are in the online service channel.</p> <p>Work with external partner sites like VA hospitals and state agencies to promote direct access to online services.</p> <p>Develop and implement a strategic marketing plan to increase online services.</p> <p>Continue to pilot a quick self-service kiosk model in our field offices, expanding upon the initial effort (subject to budgetary approval).</p>	Additional authentication steps required by Executive Order 13681 may reduce use due to increased complexity of registration and log in.	<p>Nancy Berryhill Deputy Commissioner, Office of Operations</p> <p>Rob Klopp Deputy Commissioner, Office of Systems</p>
Increase customer satisfaction with our services.	<p>Regularly evaluate our Internet Customer Satisfaction survey results to identify improvements opportunities and take appropriate actions.</p> <p>Regularly evaluate our Field Office, Hearing Office, Social Security Card Center, and telephone customer satisfaction survey results to identify improvement opportunities and take appropriate actions.</p> <p>Conduct Post-Call Surveys for customers of our National 800 Number, collect and analyze customer feedback, and take appropriate actions.</p> <p>Implement the Federal Feedback Button Pilot in Card Centers.</p>	<p>Additional authentication steps required by Executive Order 13681 may affect satisfaction both positively and negatively.</p> <p>Customers may be more satisfied knowing that we have enhanced security features, but the additional complexity in registering and logging in may lower satisfaction.</p>	<p>Nancy Berryhill Deputy Commissioner, Office of Operations</p> <p>Michelle King <i>Acting</i> Deputy Commissioner, Office of Budget, Finance, Quality, and Management</p>

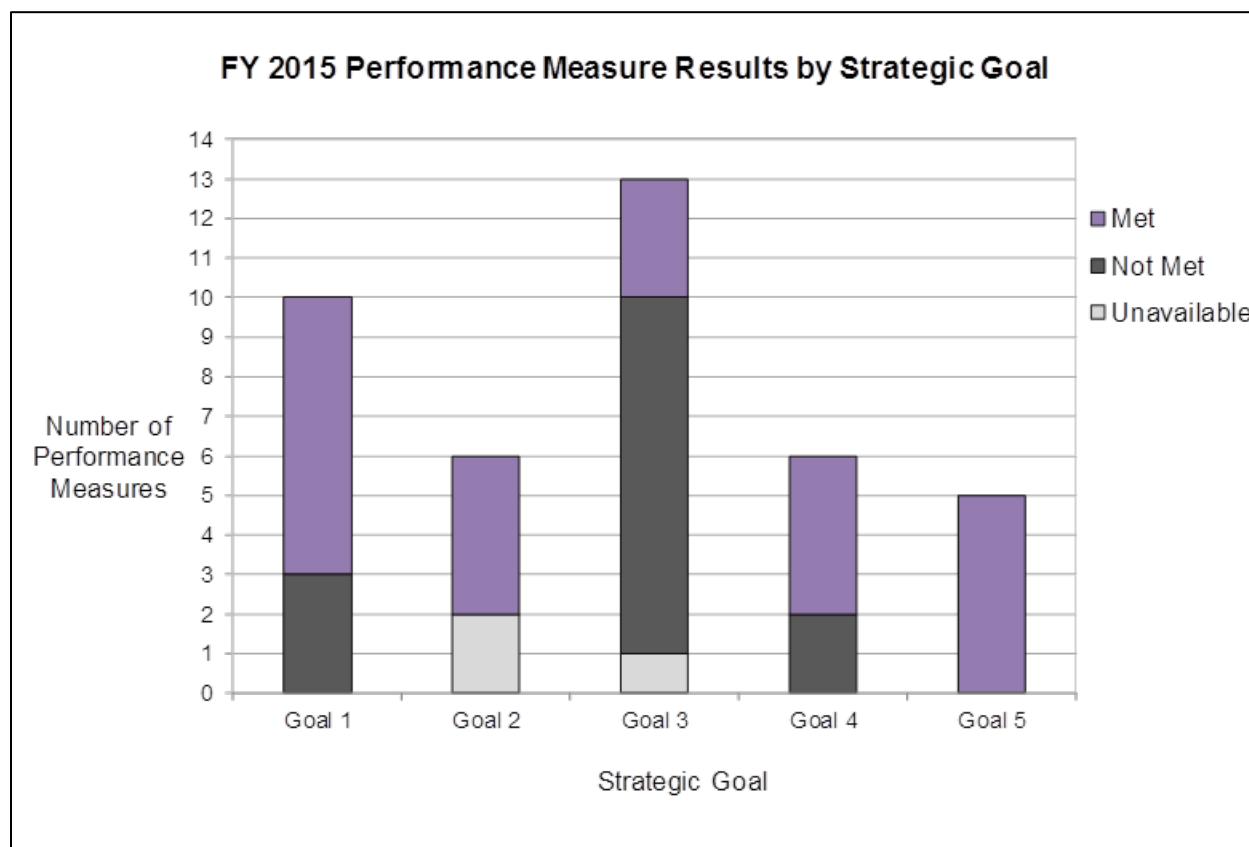
FY 2016-FY 2017 Agency Priority Goals	Strategies to Achieve Priority Goals	External Factors	Goal Leader/Deputy Goal Leader
Improve the integrity of our programs by increasing our Supplemental Security Income (SSI) payment accuracy rate to 95%.	<p>Conduct periodic reviews (redeterminations).</p> <p>Maximize the use of data to detect assets like undisclosed bank accounts and non-home real property.</p> <p>Offer a variety of SSI wage reporting tools.</p> <p>Use behavior science insights to improve recipient reporting.</p> <p>Explore additional data exchanges to verify eligibility and payment amount.</p>	<p>Self-reporting by beneficiaries is not always accurate.</p> <p>Increased fraud detection activities may find more overpayments.</p>	<p>Marianna LaCanfora Assistant Deputy Commissioner, Office of Retirement and Disability Policy</p> <p>Erik Jones Assistant Deputy Commissioner, Office of Operations</p>
Improve customer service by reducing the wait time for a hearing decision.	<p>Increase decision-making capacity.</p> <p>Process and decisional quality Improvements.</p> <p>Increase employee engagement.</p> <p>Leverage technology innovations.</p>	<p>Inability to hire sufficient judges and other staff.</p> <p>Declination of video hearings.</p>	<p>Donna Calvert Assistant Deputy Commissioner, Office of Disability Adjudication and Review</p> <p>Mary Horne Assistant Deputy Commissioner, Office of Operations</p>

# Performance Measures at a Glance

## Our FY 2015 Performance Results

We set aggressive targets for our fiscal year (FY) 2015 measures. We met 23 of the 36 measures with available data. While we made significant progress in many areas, we also faced a number of challenges. We did not meet 14 of the 36 measures with available data.

Below is an assessment of our performance results by strategic goal in FY 2015.



## Our Performance Measures

These tables are a summary of our FY 2016 and FY 2017 performance measures and FY 2015 performance results. We organized the measures based on the strategic goals and objectives they support in the [Agency Strategic Plan for Fiscal Years 2014 – 2018](#) and indicated which measures are Agency Priority Goals (APG). While budgeted workload measures support our strategic goals and objectives, their targets and outcomes are budget dependent. We identify our budgeted workload measures as BWM. We identify newly established measures for FY 2016 and FY 2017 as NEW. We identify the measures we discontinued this year by the purple shading in the FY 2016 target and FY 2017 target. A listing of acronyms for the responsible officials is in [Appendix E, Summary of Key Management Officials' Responsibilities](#).

## Strategic Goal 1: Deliver Innovative, Quality Services

### Strategic Objective 1.1: Develop and Increase the Use of Self-Service Options

Strategic Objective 1.1 Lead: DCO

Vision 2025 Priority: Superior Customer Experience

Performance Measure		FY 2015 Performance	FY 2015 Target	FY 2016 Target	FY 2017 Target	Responsible Official	Page
1.1a APG	Improve access to our services by increasing the number of citizens who complete their business with us online	87 million transactions	Increase the number of citizens completing business online by 10% over FY 2014  (77.8 million transactions)			DCO	40
		Met					
1.1b APG NEW	Improve customer service and convenience by increasing online transactions by 25 million each year	87 million online transactions		112 million online transactions	137 million online transactions	DCO DCS	40

### Strategic Objective 1.2: Enhance the Customer Experience by Completing Customers' Business at the First Point of Contact

Strategic Objective 1.2 Lead: DCO

Vision 2025 Priority: Superior Customer Experience

Performance Measure		FY 2015 Performance	FY 2015 Target	FY 2016 Target	FY 2017 Target	Responsible Official	Page
1.2a APG	Deliver a world-class customer experience by expanding the use of video technology to hold hearings	27%	30% of hearings conducted by video			DCDAR	43
		Not Met					

Performance Measure		FY 2015 Performance	FY 2015 Target	FY 2016 Target	FY 2017 Target	Responsible Official	Page
1.2b	Expand the services available under <i>my Social Security</i> by implementing an online Social Security Number Replacement Card application	The online Social Security Number Replacement Card application was released in November 2015 Met	Complete development and begin testing of the online Social Security Number Replacement Card application			DCO	43
1.2c	Maintain high customer satisfaction with our online services	84 Met	Maintain an average customer satisfaction score of at least 80			DCO	44
1.2d APG	Provide the public with access to personalized information by increasing the number of established <i>my Social Security</i> accounts	6.64 million new accounts Not Met	Increase the number of customers who sign up for <i>my Social Security</i> by 15% over FY 2014 (7.06 million new accounts)			DCO	45
1.2e APG NEW	Increase customer satisfaction with our services	84 satisfaction rating with online services 79% satisfaction rating for office and telephone services		84.5 satisfaction rating with online services 80% satisfaction rating for office and telephone services	85 satisfaction rating with online services 82% satisfaction rating for office and telephone services	DCO DCBFQM	46
1.2f BWM	Complete the budgeted number of retirement, survivors, and Medicare claims	5,327,221 Met	5,247,000	5,586,000	5,732,000	DCO	46

Performance Measure		FY 2015 Performance	FY 2015 Target	FY 2016 Target	FY 2017 Target	Responsible Official	Page
1.2g BWM	Achieve the target speed in answering National 800 Number calls	617 seconds (10 minutes, 17 seconds)	700 seconds (11 minutes, 40 seconds)	945 seconds (15 minutes, 45 seconds)	675 seconds (11 minutes, 15 seconds)	DCO	47
		Met					
1.2h BWM	Achieve the target busy rate for National 800 Number calls	7.5%	8%	9.5%	7.0%	DCO	48
		Met					

### Strategic Objective 1.3: Partner with Other Agencies and Organizations to Improve Customers' Experience and Align with the Administration's One-Government Approach

Strategic Objective 1.3 Lead: DCO

*Vision 2025* Priority: Superior Customer Experience

Performance Measure		FY 2015 Performance	FY 2015 Target	FY 2016 Target	FY 2017 Target	Responsible Official	Page
1.3a	Minimize the average response time to deliver medical evidence to the Department of Veteran Affairs (VA) for wounded warriors and veterans	Delivered medical evidence in 4.2 business days	Deliver medical evidence to the VA within an average of 5 business days	Continue to deliver medical evidence to the VA within an average of 5 business days	Continue to deliver medical evidence to the VA within an average of 5 business days	DCO	53
		Met					

## Strategic Objective 1.4: Evaluate Our Physical Footprint to Incorporate Improved Service Options

Strategic Objective 1.4 Lead: DCBFQM

Vision 2025 Priority: Innovative Organization

Performance Measure		FY 2015 Performance	FY 2015 Target	FY 2016 Target	FY 2017 Target	Responsible Official	Page
1.4a	Evaluate our physical footprint as described in our OMB-approved Real Property Cost Savings and Innovation Plan	Reduced our physical footprint by 1.34 million usable square feet	Reduce our physical footprint from our FY 2012 level by 1.86 million usable square feet			DCBFQM DCO DCDAR	56
		Not Met					
1.4b NEW	Assess field and hearing office lease expirations and increase colocation of our field and hearing offices to reduce our physical footprint			Colocate at least 4 permanent remote site hearing offices with field offices	Colocate at least 7 permanent remote site hearing offices with field offices	DCO DCDAR	56



## Strategic Goal 2: Strengthen the Integrity of Our Programs

### Strategic Objective 2.1: Transform the Way We Record Earnings to Enhance Data Accuracy

Strategic Objective 2.1 Lead: DCS

*Vision 2025* Priority: Innovative Organization

Performance Measure		FY 2015 Performance	FY 2015 Target	FY 2016 Target	FY 2017 Target	Responsible Official	Page
2.1a	Improve the accuracy and timeliness of the earnings data used to calculate benefits	Implemented the redesigned software to process Forms W-2 within the Annual Wage Reporting system	Implement the redesigned functionality to process Forms W-2 within the Annual Wage Reporting system by 09/30/2015	Implement the redesigned functionality to process Forms W-2c (Corrections) within the Annual Wage Reporting system	Implement Annual Wage Reporting software to provide earnings data to the IRS earlier in the tax season	DCS	60
		Met					

## Strategic Objective 2.2: Protect the Public's Data and Provide Secure Online Services

Strategic Objective 2.2 Lead: DCBFQM

Vision 2025 Priority: Superior Customer Experience

Performance Measure		FY 2015 Performance	FY 2015 Target	FY 2016 Target	FY 2017 Target	Responsible Official	Page
2.2a	Enhance our security features and business processes to prevent and detect fraud	The fraud referral process was transferred to the newly established Office of Anti-Fraud Programs. We use Public Facing Integrity Review data to create and implement the routing transit number blocking process <sup>1</sup>	Increase <i>my Social Security</i> potential fraud referrals through the Public Facing Integrity Review system to the Office of Operations by 10% (10,295) (10,295 referrals)	Identify and investigate at least 500 claims presenting characteristics indicative of fraud	Identify and investigate at least 750 claims presenting characteristics indicative of fraud	DCBFQM	63
		Met					

## Strategic Objective 2.3: Increase Payment Accuracy

Strategic Objective 2.3 Lead: DCRDP

Vision 2025 Priority: Innovative Organization

Performance Measure		FY 2015 Performance	FY 2015 Target	FY 2016 Target	FY 2017 Target	Responsible Official	Page
2.3a APG	Reduce the percentage of improper payments made under the SSI program	Data available April 2016	No more than 6.2% of all payments made under the SSI program are improper payments (i.e., overpayments and underpayments)			DCRDP	69

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<sup>1</sup> Due to the sensitivity of this information, we cannot include exact numbers.

Performance Measure		FY 2015 Performance	FY 2015 Target	FY 2016 Target	FY 2017 Target	Responsible Official	Page
2.3b	Maintain a high accuracy rate of payments made through the Old-Age, Survivors, and Disability Insurance program to minimize improper payments	Data available April 2016	99.8% (O/P)	99.8% (O/P)	99.8% (O/P)	DCRDP	70
		Data available April 2016	99.8% (U/P)	99.8% (U/P)	99.8% (U/P)		
2.3c APG NEW	Improve the integrity of the SSI program by ensuring that 95% of our payments are free of overpayment	Data available April 2016		95% accuracy rate	95% accuracy rate	DCRDP DCO	70
2.3d BWM	Complete the budgeted number of full medical continuing disability reviews (CDR)	799,013	790,000	850,000	1,100,000	DCO	70
		Met					
2.3e BWM	Complete the budgeted number of Supplemental Security Income (SSI) non-medical redeterminations	2,266,993	2,255,000	2,522,000	2,822,000	DCO	71
		Met					

## Strategic Goal 3: Serve the Public through a Stronger, More Responsive Disability Program

### Strategic Objective 3.1: Improve the Quality, Consistency, and Timeliness of Our Disability Decisions

Strategic Objective 3.1 Lead: DCRDP

Vision 2025 Priority: Innovative Organization

Performance Measure		FY 2015 Performance	FY 2015 Target	FY 2016 Target	FY 2017 Target	Responsible Official	Page
3.1a	Ensure the quality of our decisions by achieving the disability determination services (DDS) net accuracy rate for initial disability decisions	98% net accuracy	97% net accuracy	97% net accuracy	97% net accuracy	DCO	76
		Met					
3.1b	Increase our ability to provide timely decisions by reducing the percentage of pending Appeals Council requests for review 365 days old or older	82%	80% of cases pending less than 365 days	81% of cases pending less than 365 days	82% of cases pending less than 365 days	DCDAR	76
		Met					
3.1c APG NEW	Improve customer service by reducing the wait time for a hearing decision			Decide 99% of the cases that begin the fiscal year at 430 days old or older	Decide 99% of the cases that begin the fiscal year at 365 days old or older	DCDAR DCO	77
3.1d BWM	Complete the budgeted number of initial disability claims	2,759,432	2,767,000	2,695,000	2,810,000	DCO	77
		Not Met					
3.1e BWM	Complete the budgeted number of disability reconsideration claims	723,485	739,000	702,000	715,000	DCO	78
		Not Met					

Performance Measure		FY 2015 Performance	FY 2015 Target	FY 2016 Target	FY 2017 Target	Responsible Official	Page
3.1f BWM	Complete the budgeted number of hearing requests	663,129	727,000	703,000	784,000	DCDAR	78
		Not Met					
3.1g BWM	Achieve the target number of initial disability claims pending	621,315	621,000			DCO	78
		Not Met					
3.1h BWM	Achieve the target number of disability reconsiderations pending	143,540	143,000			DCO	79
		Not Met					
3.1i BWM	Average processing time for initial disability claims	114 days	109 days	113 days	113 days	DCO	79
		Not Met					
3.1j BWM	Average processing time for reconsiderations <sup>2</sup>	113 days			109 days	DCO	80
3.1k BWM	Average processing time for hearings decisions	480 days	470 days	540 days	555 days	DCDAR	80
		Not Met					
3.1l BWM	Achieve the budgeted goal for disability determination services (DDS) case production per workyear	307	313			DCO	81
		Not Met					

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<sup>2</sup>We developed management information for Average Processing Time for Disability Reconsiderations in FY 2013. FY 2014 was the first full fiscal year for which data was available for this measure. Now that we have had the opportunity to analyze at least two years of actual data, this year we developed a performance target for FY 2017.

Performance Measure		FY 2015 Performance	FY 2015 Target	FY 2016 Target	FY 2017 Target	Responsible Official	Page
3.1m BWM	Achieve the budgeted goal for hearing case production per workyear	95	104			DCDAR	81
		Not Met					

### Strategic Objective 3.2: Maximize Efficiencies throughout the Disability Program

Strategic Objective 3.2 Lead: DCS

*Vision 2025* Priority: Innovative Organization

Performance Measure		FY 2015 Performance	FY 2015 Target	FY 2016 Target	FY 2017 Target	Responsible Official	Page
3.2a	Improve the disability determination process by increasing the percentage of initial disability claims using electronically transmitted health records and medical evidence (Health IT)	6.1% (167,626 initial claims)	6% of processed initial disability claims with health IT medical evidence (164,820 initial claims)	8% of processed initial disability claims with electronically transmitted health records and medical evidence (Health IT) (222,000 initial claims)	11% of processed initial disability claims with electronically transmitted health records and medical evidence (Health IT) (308,000 initial claims)	DCS	84
		Met					

### Strategic Objective 3.3: Enhance Employment Support Programs and Create New Opportunities for Returning Beneficiaries to Work

Strategic Objective 3.3 Lead: DCRDP

Vision 2025 Priority: Innovative Organization

Performance Measure		FY 2015 Performance	FY 2015 Target	FY 2016 Target	FY 2017 Target	Responsible Official	Page
3.3a	Increase the number of beneficiaries returning to work by achieving the target number of Social Security Disability Insurance and Supplemental Security Income disability beneficiaries with Tickets assigned and in use, who work above a certain level	Data available April 2016	50,000 beneficiaries	55,000 beneficiaries	60,000 beneficiaries	DCRDP	88

### Strategic Goal 4: Build a Model Workforce to Deliver Quality Service

#### Strategic Objective 4.1: Attract and Acquire a Talented and Diverse Workforce that Reflects the Public We Serve

Strategic Objective 4.1 Lead: DCHR

Vision 2025 Priority: Exceptional Employees

Performance Measure		FY 2015 Performance	FY 2015 Target	FY 2016 Target	FY 2017 Target	Responsible Official	Page
4.1a	Maintain the target veteran and disabled veteran new hire percentage to improve their representation in our workforce	39.32%	25.0% Veterans			DCHR	92
		Met					
		18.57%	17.5% Disabled Veterans				
		Met					

Performance Measure		FY 2015 Performance	FY 2015 Target	FY 2016 Target	FY 2017 Target	Responsible Official	Page
4.1b	Strengthen workforce diversity by maintaining the representation of employees with targeted disabilities	2%	2%	2%	2%	DCHR	93
		Met					

## Strategic Objective 4.2: Strengthen the Competency, Agility, and Performance of Our Workforce to Align with the Needs of the Public

Strategic Objective 4.2 Lead: DCHR

*Vision 2025* Priority: Exceptional Employees

Performance Measure		FY 2015 Performance	FY 2015 Target	FY 2016 Target	FY 2017 Target	Responsible Official	Page
4.2a	Strengthen workforce competence by improving our talent management index score	59%	Increase the talent management index score to 60%	Increase the talent management index score to 61%	Increase the talent management index score to 63%	DCHR	98
		Not Met					

## Strategic Objective 4.3 Foster an Inclusive Culture that Promotes Employee Well-Being, Innovation, and Engagement

Strategic Objective 4.3 Lead: DCHR

*Vision 2025* Priority: Exceptional Employees

Performance Measure		FY 2015 Performance	FY 2015 Target	FY 2016 Target	FY 2017 Target	Responsible Official	Page
4.3a	Become one of the Top 5 Best Places to Work among large agencies in the Federal Government	Top 10 Ranking	Achieve a Top 10 Ranking	Achieve a Top 5 Ranking	Achieve a Top 5 Ranking	DCHR	103
		Met					



Performance Measure		FY 2015 Performance	FY 2015 Target	FY 2016 Target	FY 2017 Target	Responsible Official	Page
4.3b	Increase workplace flexibilities by expanding telework opportunities for employees	13,514 employees participating in telework	Increase the number of employees participating in telework to 16,400 by the end of the fiscal year			DCHR	104
		Not Met					
4.3c NEW	Increase employee engagement as measured by the employee engagement index score	68%		69%	70%	DCHR	105

#### Strategic Objective 4.4: Enhance Planning and Alignment of Human Resources to Address Current and Future Public Service Needs

Strategic Objective 4.4 Lead: DCHR

Vision 2025 Priority: Exceptional Employees

Performance Measure		FY 2015 Performance	FY 2015 Target	FY 2016 Target	FY 2017 Target	Responsible Official	Page
4.4a	Lay the foundation for building a 21st century workforce by meeting or exceeding targeted Human Resources measures	83%	Achieve 75% of the human capital metrics	Achieve 78% of the human capital metrics	Achieve 80% of the human capital metrics	DCHR	109
		Met					

## Strategic Goal 5: Ensure Reliable, Secure, and Efficient Information Technology Services

### Strategic Objective 5.1: Maintain System Performance and the Continuity of Information Technology Services

Strategic Objective 5.1 Lead: DCS

Vision 2025 Priority: Innovative Organization

Performance Measure		FY 2015 Performance	FY 2015 Target	FY 2016 Target	FY 2017 Target	Responsible Official	Page
5.1a	Provide uninterrupted access to our systems during scheduled times of operation	99.96% availability	99.5% availability	99.5% availability	99.5% availability	DCS	112
		Met					

### Strategic Objective 5.2: Enhance and Execute Plans to Modernize Our Systems

Strategic Objective 5.2 Lead: DCS

Vision 2025 Priority: Innovative Organization

Performance Measure		FY 2015 Performance	FY 2015 Target	FY 2016 Target	FY 2017 Target	Responsible Official	Page
5.2a	Enhance systems performance and reliability by upgrading the telecommunications infrastructure in our offices	Refreshed 100% of our network connection devices	Refresh 50% of our network connection devices by September 30, 2015			DCS	115
		Met					
5.2b NEW	Improve customer service by using information technology to provide new online services to users of <i>my Social Security</i>			Implement new fraud and authentication capabilities to enable customers to obtain replacement Social Security Cards securely through the <i>my Social Security</i> portal	Modernize the <i>my Social Security</i> portal framework to speed the integration of service offerings and to better group available functions together to focus on targeted user groups	DCS	116

## Strategic Objective 5.3: Incorporate Innovative Advances in Service Delivery

Strategic Objective 5.3 Lead: DCS

Vision 2025 Priority: Innovative Organization

Performance Measure		FY 2015 Performance	FY 2015 Target	FY 2016 Target	FY 2017 Target	Responsible Official	Page
5.3a	Enhance our IT infrastructure by implementing innovative systems accessibility and performance capabilities	Reduced our open systems infrastructure size to 1,000 servers	Reduce open systems infrastructure size from 1,500 servers to 1,000 servers by September 2015	Deploy new applications with a modern look and feel, accessible from the web or over mobile devices	Develop and implement our plan (strategy, policy, business model, and security requirements) for the establishment of an agency cloud service	DCS	119
		Met					
5.3b	Explore the use of emerging technologies by establishing a testing lab to promote research and development of innovative technology solutions that provide more effective and flexible ways for the public to conduct business with us online and for our employees to complete their work	Conducted three new research projects	Conduct three new research projects in emerging technologies such as predictive analytics, cloud, shared services, self-help personal computers, real-time chat, digital analytics, and cognitive computing by September 30, 2015			DCS	120
		Met					

## Strategic Objective 5.4: Continuously Strengthen Our Cyber Security Program

Strategic Objective 5.4 Lead: DCS

Vision 2025 Priority: Superior Customer Experience

Performance Measure		FY 2015 Performance	FY 2015 Target	FY 2016 Target	FY 2017 Target	Responsible Official	Page
5.4a	Provide secure and effective services to the public by improving cyber security performance	<p>Hardware Asset Management – result 100%</p> <p>Software Asset Management – result 100%</p> <p>Vulnerability and Weakness Management – result 100%</p> <p>Unprivileged Network Users – result 86%</p> <p>Privileged Network Users – result 99%</p> <p>Anti-Phishing Defense – result 100%</p> <p>Malware Defense – result 100%</p> <p>Blended Defense – result 100%</p> <p>Met</p>	Meet the performance requirements of the Department of Homeland Security's Federal Network Security Compliance and Assurance Program and the Cybersecurity Cross-Agency Priority Goals	<p>Achieve an average of 97% for the following Cyber Security Cross-Agency Priority Goals:</p> <p>Anti-phishing defense; Malware defense; Blended defense (anti-phishing and malware defense measures); Hardware asset management; Software asset management; and Vulnerability and weakness management</p>	<p>Achieve an average of 99% for the following Cyber Security Cross-Agency Priority Goals:</p> <p>Anti-phishing defense; Malware defense; Blended defense (anti-phishing and malware defense measures); Hardware asset management; Software asset management; and Vulnerability and weakness management</p>	DCS	123

# Agency Plans and Performance

Setting goals and measuring our achievements are vital to our success. This annual performance report reflects the goals, objectives, and strategies defined in our [Agency Strategic Plan for Fiscal Years 2014 – 2018](#).

We organized this section by our five strategic goals, and the strategic objectives and strategies supporting each goal. The key initiatives under each strategic objective support our strategic goals, objectives, and strategies. We evaluate our performance results by the performance measures and targets following each strategic objective.

We based our FY 2017 plans on full funding of the FY 2017 President's Budget.

## Strategic Goal 1: Deliver Innovative, Quality Services

We have a long history of exemplary customer service marked by high customer satisfaction. Our high level of customer satisfaction is, in part, the result of our success using technology to improve and expand the services we offer the American public.

We serve the public through multiple channels: in person, telephone, online, and by mail. In FY 2015, we assisted about 41 million field office visitors, handled nearly 37 million calls through our National 800 Number and 60 million calls in our field offices, registered over 6.64 million users for [my Social Security](#), processed over 87 million online transactions, and mailed nearly 350 million notices.

Technology will not replace our employees or in-person service for customers who require or prefer more personalized service. Our goal is to provide high quality and timely services while offering customers the convenience of interacting with us from anywhere. At the same time, we will continue providing telephone and field office options for situations requiring personalized service.

## Strategic Objective 1.1: Develop and Increase the Use of Self-Service Options

### **Vision 2025 Priority: Superior Customer Experience**

Over the past few decades, advances in technology have revolutionized the business world, changing the pace of our business processes and increasing our ability to offer innovative service options. In 2007, less than 10 percent of claims were filed online – in FY 2015, more than 54 percent of claims were filed online.

The public expects to complete more business online, and we continue meeting those expectations with new and improved technologies. As we increase the number and types of self-service solutions, paperless processes, and electronic workflows, we will improve our overall efficiency. As we expand our online options, we will ensure our customers' information remains secure.

We are working to increase customer satisfaction by expanding personalized self-service delivery options, which enable customers to access our services at their convenience. We will continue meeting our customers' needs by providing them with choices, offering service online, in person, or by telephone.

### Strategies

- Expand personal services available under [my Social Security](#) to include high-volume workloads, such as Social Security number replacement cards;
- Move our online applications under a single customer account registration;
- Accelerate development of additional online products;
- Expand the availability of online applications using responsive design and the use of self-help personal computers available in our offices or community locations;
- Provide direct access to information and notices for individuals and designated third parties;
- Offer electronic delivery of notices and an option to opt out of paper notices; and
- Increase the public's use of self-service options by aggressively promoting and marketing our online applications and services.

## Progress Update

We took the following steps in FY 2015 to develop and increase our self-service options (see Key Initiatives and Performance Measures for more details):

- Launched Social Security Benefit Statement (i1099) online, reducing mail requests by more than 60 percent;
- Streamlined the online disability application, eliminating 25 duplicate data fields;
- Replaced self-help personal computers with virtual desktop infrastructure and expanded service to 300 new offices, bringing the total 1,684 computers in 790 offices;
- Released the online Social Security Number Replacement Card application in November 2015;
- Continued [my Social Security](#) marketing campaign; and
- Made the following progress on our Social Security Express initiatives:
  - Installed 7 customer service stations and answered 2,102 video calls to assist customer service station users in real time;
  - About 135,000 iClaims were filed using self-help personal computers;
  - Partnered with 93 additional sites to add desktop icons, bringing our total to 261 partner sites with desktop icons; and
  - Designed a website so that third-party sites can download the desktop icon directly, minimizing user error and streamlining the process.

## Next Steps

- Enhance [our website](#) with responsive web design to support access by personal computer, mobile devices, and tablets;
- Expand i1099 application to include an option for beneficiaries to opt out of mailed Social Security Benefit Statements and add downloadable functionality; and
- Continue planning, analysis, and development of new applications to put behind the [my Social Security](#) portal, including:
  - Message center functionality, which will enable secure communications online; and
  - SMART Claim application, which will enable customers to file for retirement, disability, and Medicare benefits at the same time.

## Risks and External Factors

In addition to general privacy, legal, and budget concerns, the following risks or external factors may affect our efforts to develop and increase the use of self-service options:

- Demand for new technologies and online services is greater than our ability to provide them;
- Implementing stronger fraud prevention protocols for [my Social Security](#) account authentication, as called for in Executive Order 13681, could result in increased in-person visits to field offices;
- Adequate training to ensure employees are comfortable with new technologies; and
- Implementation problems with new technologies.

## Key Initiatives

### Expanding Online Access through Social Security Express

Customers without access to a computer might think they cannot use our online services, but our new service options expand access to our online services. Our Social Security Express initiative provides access to our online services, including [my Social Security](#), in our field offices and in external locations. Using these services helps minimize wait times for visitors who must complete their business with us in person.

Currently, we have three major Social Security Express projects underway:

- **Self-help personal computers** are available in 790 offices nationwide. These computers allow our customers to access our online services using computers inside our offices, enabling customers to complete some transactions without waiting to see a representative.

In FY 2014, we purchased a new virtual desktop infrastructure technology, which enables us to troubleshoot these computers remotely. The new technology reduces the amount of staff time required to maintain our current self-help personal computers.

In FY 2015, we added 150 locations. We will continue expanding the program in FY 2016 and FY 2017, adding new locations and additional equipment as needs are defined.

- **Social Security Express Desktop Icons** provide a direct link from a public computer or website to most of the agency's online services. These icons are available to external partner sites, such as libraries and senior centers. Users can access the same services that are available through the self-help personal computers in our field offices. If customers have questions or require assistance accessing online services through the icon links, they can call our National 800 Number or visit a field office for help completing their tasks.

In FY 2015, we designed a process allowing partner sites to download the desktop icon directly to a PC or website and launched the site nationally on May 15, 2015. The installation process is now more efficient, and we have added 134 new partners. Visits to Social Security Express through our icons more than tripled from 19,343 visits in FY 2014 to 61,470 visits in FY 2015.

- **Customer service stations** are stand-alone units, containing a computer with a touch screen monitor and video access, enabling the user to have real-time contact with a representative, if needed. The unit also contains the following features:
  - A scanner, enabling customers to scan and upload identification documents (up to passport size);
  - A printer, enabling customers to print verification letters. (If the customer does not take the document within 15 seconds, the printer retracts the document and stores it for employees to destroy);
  - A signature tablet, enabling customers to write confidential information to video agents rather than speaking it out loud; and
  - A pressure sensitive floor mat that begins the computer session when a person steps on it. If the customer steps away without personally ending the session, the system will begin a 10-second countdown and end the session automatically.



### Enhancing Delivery Options for the Replacement Social Security Benefit Statement

In FY 2014, our i1099 online application only allowed beneficiaries to request a mailed copy of their SSA-1099 or SSA-1042s tax form, or Social Security Benefit Statement. Beginning in February 2015, people who receive benefits and have a [my Social Security](#) account can view, print, and save their Social Security Benefit Statement immediately. In FY 2015, beneficiaries accessed their statements online more than 624,000 times, reducing mail requests by more than 60 percent.

Additional planned features include a downloadable Social Security Benefit Statement and the ability for users to opt out of having their statements delivered by mail.

## Leveraging **my Social Security**

To date, we have over 45,000 web pages, 20 online services, information in 18 languages, and a presence on several social media sites. We host over 12 million visits to our website each month. Our customers are demanding more online services, and we are responding as quickly as possible, while ensuring **my Social Security** remains secure and easy to use.



Current features enable Social Security disability and Supplemental Security Income beneficiaries to access their benefit verification letters, payment histories, and earnings records instantly. Beneficiaries can also change their addresses and direct deposit information online. Since it launched in 2012, **my Social Security** has more than 21 million registered users and consistently ranks as one of the top 10 in customer satisfaction for all federal websites.

Work is now underway on a new feature called SMART Claim that will allow our customers to file a claim for retirement, disability, Medicare, and Supplemental Security Income benefits using a single application within **my Social Security** by the end of FY 2016.

Additional features planned for **my Social Security** and SMART Claim in FY 2015 and into FY 2016 include:

- Social Security number replacement card requests;
- New secure customer engagement tools, including enhancements to click-to-callback, dynamic help assistance, a secure message center, and alerts and notifications;
- An alternate path allowing customers to complete their applications online, if they are unable to register for or do not have a **my Social Security** account;
- Online continuing disability review notification and response options for beneficiaries; and
- A claims appeal path.

We are planning additional enhancements that will allow users to view certain notices online in FY 2017.

## Educating the Public about Our Programs

Ensuring the public understands our programs is part of our social responsibility. Our national marketing campaign uses a wide variety of media channels to tell the public how to access and use our programs. As more of our customers move toward a preference and expectation for online services, we are focusing significant resources on promoting our online options.

We promote our online services through public service announcements on television, radio, billboards, bus posters, and displays in airport terminals, as well as through social media. We engage with the public on our Facebook page, responding to questions, and promoting our services. Over the next several years, we will continue expanding our social media efforts using search engine marketing, paid Facebook advertising, and blogs promoting our online service options.

We encourage people to create **my Social Security** accounts through a variety of communications channels, including our mailed *Social Security Statements*. Additionally, our local offices find creative and cost-effective ways to inform the community about the advantages of using our secure online services.

We also work with a broad network of national organizations, advocacy groups, and other stakeholders to promote our online services. Additionally, we produce webinars and webcasts to increase our customers' awareness of our online services and the benefits of using these services.

Since **my Social Security** provides quick access to documents used in tax preparation, we focused our FY 2015 promotional efforts on tax preparers. We partnered with the Internal Revenue Service (IRS) to include **my Social Security** information in its publications and on its website. We also participated in IRS tax forums. We also worked with TaxACT, a tax preparation software company to provide information to its six million customers. TaxACT plans to place **my Social Security** banner ads and other content throughout its website this year. TaxACT is also working with us to incorporate **my Social Security** into its tax preparation software next year.

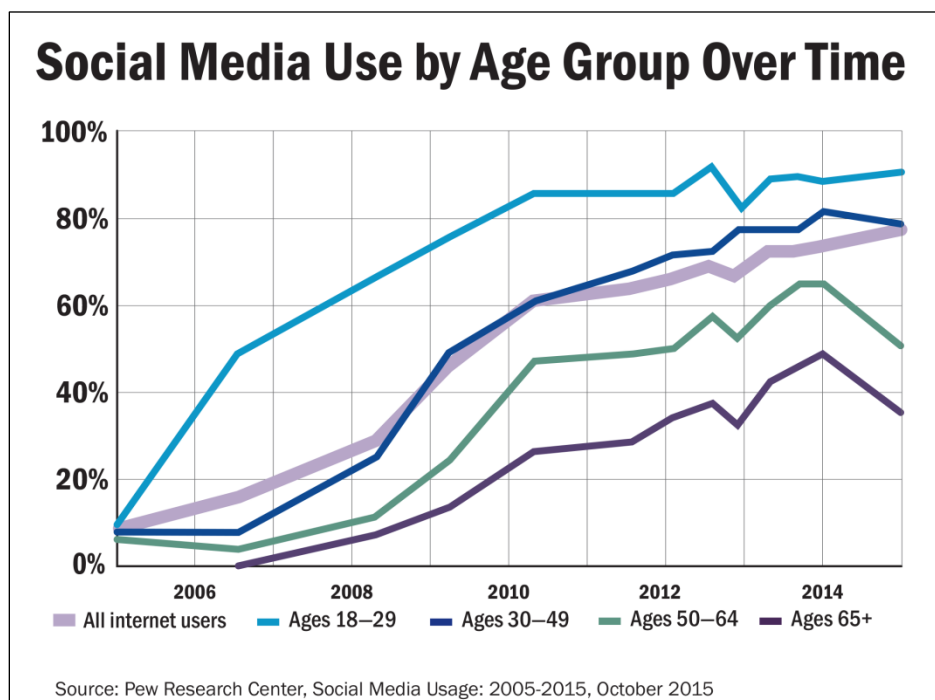


Together with the U.S. Department of the Treasury, the Women’s Institute for a Secure Retirement, the American Savings Education Council, and America Saves, we launched the Campaign for a Secure Retirement. The campaign ran from late February 2015 through the conclusion of National *my Social Security* week in July 2015. This nationwide campaign encouraged retirement planning and saving and promoted the online *Social Security Statement* as an important retirement planning tool.

We continued to build relationships with other organizations throughout FY 2015. We participated in approximately 40 national conferences, and we will continue to coordinate *my Social Security* signup events. In the first half of FY 2015, we participated in 981 signup events with over 116,072 individuals attending. These events assisted the public in creating 16,781 *my Social Security* accounts.

As we move into FY 2016 and FY 2017, we will continue marketing our online services. Other plans include:

- Launching an employee education program in FY 2016, focusing on preparing and providing employees with the information and tools they need to communicate our messages;
- Communicating key information related to the disability solvency trust fund issue;
- Simplifying the *Social Security Statement* in FY 2016; and
- Launching the simplified *Social Security Statement* in FY 2017.



### Enhancing Online Appeals

Since 2007, claimants or their representatives have been able to request a reconsideration or hearing for a denied disability claim online. In FY 2015, we improved the existing application to simplify the user experience and enable users to complete the full application online. We also streamlined the application process by reducing redundant keying and providing clearer navigation.

Users can now submit additional forms and documents online. These changes allow users to submit a complete hearing request online, making the process more efficient.

We will work to expand online appeals in FY 2016 and FY 2017 to allow users to request an appeal on a nonmedical claim.

### Implementing Online Social Security Number Replacement Card Application

Replacing Social Security number cards is one of our most requested services. In FY 2015, we issued 11 million replacement cards in field offices and Social Security card centers across the country.

In FY 2014, we began work to enable certain **my Social Security** users to apply online for a replacement Social Security number card. We expect to launch this new feature to select states in FY 2016, enabling users to avoid travel time, wait time, and in-person interviews. In FY 2017, we will continue to expand to additional states.

The application will provide users with a secure way to request replacement Social Security number cards online and will allow our employees more time to process other workloads.



## Appeal Online

If you recently applied for Social Security or Supplemental Security Income disability benefits and were denied for medical reasons, you can file an appeal online.

[www.socialsecurity.gov/disability/appeal](http://www.socialsecurity.gov/disability/appeal)



## Performance Measures – Strategic Objective 1.1

### 1.1a APG: Improve access to our services by increasing the number of citizens who complete their business with us online (Agency Priority Goal)

Fiscal Year	2010	2011	2012	2013	2014	2015	2016	2017
Performance	13.5 million	16.0 million	21.8 million	46.3 million	70.8 million	87 million		
Target					Increase the number of citizens completing business online by 10% over FY 2013 (50.9 million transactions)	Increase the number of citizens completing business online by 10% over FY 2014 (77.8 million transactions)		
Target Met					Met	Met		

**Results:** We exceeded our target in FY 2015, processing 87 million online transactions. We increased the number of citizens completing their business online by 23 percent over FY 2014.

**Data Definition:** Online services usage for [my Social Security](#) suite, [my Social Security](#) Help Desk-Call Back, Pre-entitlement – Informational Services (excludes visits to Social Security Online, Frequently Asked Questions, and Field Office Locator), Entitlement – Claims & Appeals, and Post Entitlement.

**Data Source:** [Social Security, Office of Electronic Services and Technology Intranet site: eServices Statistics](#)

### 1.1b APG NEW: Improve customer service and convenience by increasing online transactions by 25 million each year (Agency Priority Goal)

Fiscal Year	2010	2011	2012	2013	2014	2015	2016	2017
Performance	13.5 million	16.0 million	21.8 million	46.3 million	70.8 million	87 million		
Target							112 million transactions	137 million transactions
Target Met								

**Data Definition:** Online services usage for [my Social Security](#) suite, [my Social Security](#) Help Desk-Call Back, Pre-entitlement – Informational Services (excludes visits to Social Security Online, Frequently Asked Questions, and Field Office Locator), Entitlement – Initial Claims and Supporting Info, and Post Entitlement.

**Data Source:** [Social Security, Office of Electronic Services and Technology](#)

## Strategic Objective 1.2: Enhance the Customer Experience by Completing Customers' Business at the First Point of Contact

### *Vision 2025 Priority: Superior Customer Experience*

Whether customers call, visit us in person, or use our website, they expect to get accurate information and quickly complete their business without the need to recontact us. As more customers expect to complete their business online or through other self-service channels, we are focusing on improved call routing, video service delivery, and ongoing employee training to ensure we complete transactions efficiently and accurately at the first point of contact.

### Strategies

- Implement online support options, including click-to-talk, screen sharing, and instant messaging;
- Integrate our online applications, such as the streamlined online disability application; and
- Increase the use of video service.

### Progress Update

We took the following steps in fiscal year (FY) 2015 to help ensure our customers can complete their business during their first contact with us (see Key Initiatives and Performance Measures for more details):

- Completed the nationwide rollout of the Social Security Electronic Remittance System in December 2014;
- Installed 122 of the 133 desktop video units we purchased in FY 2014 in third-party locations;
- Implemented dynamic help and click-to-call back customer service features within the *my Social Security* portal; and
- Implemented a proof of concept to determine if we can use less expensive hardware to provide video service.

### Next Steps

- Continue planning and analysis for customer engagement tools for click-to-chat, click-to-video chat, screen sharing, secure messaging, and online notices within the *my Social Security* portal;
- Continue the planning and analysis phase of SMART claim, allowing customers to apply for all benefits with a single application, including Supplemental Security Income; and
- Expand video service delivery to new locations.

### Risks and External Factors

In addition to general privacy, legal, and budget concerns, the following risks or external factors may affect our efforts to enhance the customer experience by completing customers' business at the first point of contact:

- Upgrading bandwidth for video connections is expensive and time consuming; and
- Hardware for video service delivery is expensive.

## Key Initiatives

### Establishing the Social Security Electronic Remittance System

In early FY 2015, we launched the Social Security Electronic Remittance System nationwide. Previously, customers could only pay for preapproved standard service fees, such as those for copying electronic or paper folders, by check or money order. Our new electronic remittance system also enables payment by credit and debit card. The credit card machines used by the system are equipped with the latest chip-and-PIN technology. Because we must receive payment before we can complete the customer's request, the new system allows us to process transactions immediately. Customers can request service, make payment, and receive service promptly in cases where the files are readily accessible.

In a later phase of this project, we plan to handle other types of collections through this system.

### Expanding Video Service Delivery

Some of our customers live in areas with limited public transportation and have difficulty getting to our field offices. Video service delivery allows us to provide services to our customers at convenient third-party sites, such as hospitals, libraries, community centers, American Indian tribal centers, and homeless shelters. Video services reduce time and costs for traveling to remote locations.

To support a projected increase in disability determination services (DDS) disability hearing workloads (i.e., appeals of continuing disability review decisions), we are relocating 35 existing video units to offices where there is a greater need. In FY 2015, we installed 122 of the 133 desktop units that we purchased in FY 2014. The units will increase our capacity for conducting video hearings, expand video remote interpreting services, and provide video support for other work efforts. In FY 2016, we will explore more cost-efficient technology.

### Providing Real-Time Assistance to Online Users

Delivering world-class customer service to all of our customers, including our online users, is one of our highest priorities. In May 2014, we celebrated 20 years of providing online services.

Our newest service addition to **my Social Security** is a suite of online information and help tools. In FY 2015, we launched a new dynamic help tool and an enhanced click-to-call back option.



- **Dynamic help** presents users with three responses, based on the task the user is performing when he or she requests help. If the user still has questions, he or she can type the question into a specialized search feature that will return related information.
- If the user selects the **call back option**, our enhanced feature displays the user's phone number and allows the user to submit that number or provide an alternate. The user also receives an approximate call back time.

In FY 2016, we plan to release our new secure Message Center, enabling **my Social Security** users to receive alerts, messages, and agency announcements. Later enhancements will enable users to contact us directly through the Message Center.

## Performance Measures – Strategic Objective 1.2

### 1.2a APG: Deliver a world-class customer experience by expanding the use of video technology to hold hearings (Agency Priority Goal)

Fiscal Year	2010	2011	2012	2013	2014	2015	2016	2017
Performance	20.3%	20.1%	22.8%	26.1%	28%	27%		
Target					28% of hearings conducted by video	30% of hearings conducted by video		
Target Met					Met	Not Met		

**Results:** We did not meet our target for FY 2015. Out of 563,893 hearings, we held 152,880 of those hearings by video.

**Data Definition:** The percentage of total hearings held during the fiscal year that were video hearings. We derived the percentage by dividing the total number of video hearings held during the fiscal year by the total number of hearings held during the fiscal year.

**Data Source:** Case Processing Management System

### 1.2b: Expand the services available under **my Social Security** by implementing an online Social Security Number Replacement Card application

Fiscal Year	2014	2015	2016	2017
Performance	Project timeline was adjusted to accommodate pending changes to regulations and contract	The online Social Security Number Replacement Card application was released in November 2015		
Target	Complete planning and analysis for implementing an online Social Security Number Replacement Card application	Complete development and begin testing of the online Social Security Number Replacement Card application		
Target Met	Not Met	Met		

**Results:** We expanded services available under **my Social Security** by releasing the online Social Security Number Replacement Card application in November 2015. Additionally, we implemented an online Medicare Replacement Card application. We released this application in May 2015.

**Data Definition:** Completion of the planning and analysis portion of the project as defined by the System Development Lifecycle on the Project Resource Guide Intranet website.

**Data Source:** Completed Project Scope Agreement and System Development Plan

### 1.2c: Maintain high customer satisfaction with our online services

Fiscal Year	2010	2011	2012	2013	2014	2015	2016	2017
Performance	81	81	82	82	83	84		
Target					Maintain an average customer satisfaction score of at least 80	Maintain an average customer satisfaction score of at least 80		
Target Met					Met	Met		

**Results:** One of our highest priorities is delivering world-class customer service to all of our customers, including our online users. We exceeded our target for FY 2015. A score of 80 or higher is considered to be the threshold for excellence.

**Data Definition:** Average ForeSee Customer Satisfaction scores for the Social Security Administration's (SSA) online services. Note that ForeSee Customer Satisfaction reports their data quarterly, based upon the calendar year. For this measure to be consistent with the fiscal year, we deviate from the ForeSee Customer Satisfaction scores time-period and use the fiscal year quarters. As a result, there may be some deviation from ForeSee Customer Satisfaction scores published documents and the measure reported here.

**Data Source:** Table entitled "SSA Average Satisfaction Score" found on the [Office of Electronic Services and Technology Intranet site](#)

**1.2d APG: Provide the public with access to personalized information by increasing the number of established *my Social Security* accounts (Agency Priority Goal)**

Fiscal Year	2010	2011	2012	2013	2014	2015	2016	2017
Performance				6.32 million new accounts	6.14 million new accounts	6.64 million new accounts		
Target					Increase the number of customers who sign up for <i>my Social Security</i> by 15% over FY 2013 (7.27 million new accounts)	Increase the number of customers who sign up for <i>my Social Security</i> by 15% over FY 2014 (7.06 million new accounts)		
Target Met					Not Met	Not Met		

**Results:** In FY 2015, we increased the number of customers who signed up for *my Social Security* by 8.14 percent over FY 2014. We did not meet our goal.

**Data Definition:** The target is calculated as a percentage increase over the previous year's actual results. Thus, the FY 2015 target was calculated by taking the FY 2014 actual registrations (6.14 million) and increasing it by 15%, resulting in a target of 7.06 million new accounts.

**Data Source:** Social Security Administration, Office of Electronic Services and Technology, Division of Authentication



## 1.2e APG NEW: Increase customer satisfaction with our services (Agency Priority Goal)

Fiscal Year	2010	2011	2012	2013	2014	2015	2016	2017
<b>Performance</b>	81 satisfaction rating with online services  78% satisfaction rating for office and telephone services	81 satisfaction rating with online services  81% satisfaction rating for office and telephone services	82 satisfaction rating with online services  81% satisfaction rating for office and telephone services	82 satisfaction rating with online services  80% satisfaction rating for office and telephone services	83 satisfaction rating with online services  Data is not available for office and telephone services	84 satisfaction rating with online services  79% satisfaction rating for office and telephone services		
<b>Target</b>							84.5 satisfaction rating with online services  80% satisfaction rating for office and telephone services	85 satisfaction rating with online services  82% satisfaction rating for office and telephone services
<b>Target Met</b>								

**Data Definition:** Online services satisfaction rating comes from ForeSee’s e-Government Report Card. The satisfaction rating is calculated by averaging the scores of the following online services: SSA Main Website, iClaim, iClaim Disability, Retirement Estimator, iAppeals, Extra Help with Medicare Prescription Drug Plans, Business Services Online, and [my Social Security](#). The average is weighted based on the number of surveys completed on each of the above online services.

For office and telephone services, we define “satisfaction” as an overall service rating of excellent, very good, or good (E/VG/G) on a six-point scale: excellent, very good, good, fair, poor, or very poor. We determine the percent “satisfied” by dividing the number of responders who rate overall service as E/VG/G by the total number of responders providing a rating. We weight the overall satisfaction rate for both office and telephone services to reflect the annual population of customers served through that type of service. We then combine the weighted results for the individual surveys to compute the overall customer satisfaction rate.

**Data Source:** Social Security Administration, Office of Electronic Services and Technology and Office of Quality Review

## 1.2f: Complete the budgeted number of retirement, survivors, and Medicare claims (Budgeted Workload Measure)

Fiscal Year	2010	2011	2012	2013	2014	2015	2016	2017
Performance	4,700,990 <sup>1</sup>	4,877,955	5,001,092	5,006,855 <sup>1</sup>	5,023,533 <sup>1</sup>	5,327,221		
Target	4,718,000 (4,658,124 rec'd)	4,590,000	4,918,000	5,269,000 (4,952,591 rec'd)	5,131,000 (4,990,259 rec'd)	5,247,000	5,586,000	5,732,000
Target Met	Met	Met	Met	Met	Met	Met		

**Results:** We met our FY 2015 target, completing 5,327,221 retirement, survivors, and Medicare claims.

**Data Definition:** The number of retirement, survivors, and Medicare claims completed in the current fiscal year.

**Data Source:** Social Security Administration's Cost Analysis System

## 1.2g: Achieve the target speed in answering National 800 Number calls (Budgeted Workload Measure)

Fiscal Year	2010	2011	2012	2013	2014	2015	2016	2017
Performance	203 seconds (3 minutes, 23 seconds)	180 seconds (3 minutes)	294 seconds (4 minutes, 54 seconds)	617 seconds (10 minutes, 17 seconds)	1,323 seconds (22 minutes, 3 seconds)	617 seconds (10 minutes, 17 seconds)		
Target	269 seconds (4 minutes, 29 seconds)	267 seconds (4 minutes, 27 seconds)	285 seconds (4 minutes, 45 seconds)	535 seconds (8 minutes, 55 seconds)	1,020 seconds (17 minutes)	700 seconds (11 minutes, 40 seconds)	945 seconds (15 minutes, 45 seconds)	675 seconds (11 minutes, 15 seconds)
Target Met	Met	Met	Not Met	Not Met	Not Met	Met		

**Results:** We met our FY 2015 target by answering our National 800 Number calls one minute, 23 seconds quicker than our target speed.

**Data Definition:** We calculate the speed of answering by dividing the wait time of all National 800 Number calls answered by agents by the number of all National 800 Number calls answered by agents in the fiscal year. Wait time begins from the time we transfer the caller to the agent queue (waiting for an agent) and continues until an agent answers the call.

**Data Source:** Data generated by Cisco Intelligent Contact Management system

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<sup>1</sup> Performance results are based on actual receipts because actual receipts were lower than the target.

### 1.2h: Achieve the target busy rate for National 800 calls (Budgeted Workload Measure)

Fiscal Year	2010	2011	2012	2013	2014	2015	2016	2017
Performance	5.0%	3.0%	5.0%	11.9%	13.5%	7.5%		
Target	8.0%	6.0%	6.0%	16.0%	14%	8%	9.5%	7.0%
Target Met	Met	Met	Met	Met	Met	Met		

**Results:** In FY 2015, our busy rate for National 800 calls was below that of our target of 8 percent. We exceeded our target.

**Data Definition:** We calculate the agent busy rate as the number of National 800 Number busy messages divided by the number of National 800 Number calls requesting agent service in the fiscal year. The caller receives a busy message when the number of calls offered exceeds the number of telephone lines available or when the agent queue has reached its maximum capacity of waiting calls.

**Data Source:** Data generated by Cisco Intelligent Contact Management system

## Strategic Objective 1.3: Partner with Other Agencies and Organizations to Improve Customers' Experience and Align with the Administration's One-Government Approach

### *Vision 2025 Priority: Superior Customer Experience*

Many people seeking benefits from us also interact with other agencies and private organizations. By partnering with other agencies, community-based organizations, tribal governments, and the private sector, we can improve our customers' experiences. We can learn from each other, share data, and develop processes that help our customers access services more quickly and easily.

### Strategies

- Implement Social Security Express to provide service using self-service customer service stations in community locations;
- Provide Social Security services through other government agencies, community-based organizations, tribal governments, and private organizations that serve our customers;
- Increase collaboration with the Department of Defense (DoD) and Department of Veterans Affairs (VA) to improve processes for veterans and service members; and
- Improve information sharing among other government agencies for records, data, and other information.

### Progress Update

We took the following steps in fiscal year (FY) 2015 to improve customers' experience through partnerships with other agencies (see Key Initiatives and Performance Measures for more details):

- Installed three additional customer service stations in the New York and Philadelphia regions, bringing the total to seven;
- Completed 4,274 transactions on our Customer Service Stations (CSS), including answering 2,102 video calls to assist customers in real time;
- Partnered with over 50 community locations to provide video service delivery; and
- Partnered with organizations affiliated with the VA and Health and Human Services to expand our Social Security Express Projects;
- Partnered with the Internal Revenue Service (IRS) to promote each other's online services. The IRS added the SSA Express icon link to 100 of its kiosks in 37 locations across the country; and
- Partnered with the Alaska Online with Libraries to provide 125 video locations across remote Alaska, areas to reduce travel time for claimants and representatives attending hearings before an administrative law judge.

### Next Steps

- Evaluate the customer service station project and, if successful, obtain agreements with additional third-party sites for installation;
- Issue additional desktop icons to local government and private organizations;
- Partner with additional veterans organizations to provide access to our online services;
- Expand data exchanges with the VA and DoD;
- Determine system requirements to exchange information with the VA to receive medical information quicker;
- Increase federal data exchange partnerships from 18 federal agencies to 22 federal agencies;
- Develop and publish the types of data commonly shared among federal agencies; and
- Add links to the IRS web site on our self-help personal computers in up to 16 pilot locations.

## Risks and External Factors

In addition to general privacy, legal, and budget concerns, the following risks or external factors may affect our efforts to partner with other agencies and organizations to improve our customers' experience and align with the Administration's one-government approach:

- The DoD and VA have their own mission-critical work, priorities, and resource limitations;
- Lack of buy-in from potential partners; and
- Problems with new technologies.

## Key Initiatives

### Expanding Our Partnerships with External Organizations

Our Social Security Express initiative currently includes two self-service options that allow the public to complete their business from external partner locations (local, state, or Federal Government agencies such as the VA or the Department of Housing and Urban Development). Those self-service options are:

- A Social Security Express icon installed on the partner sites' desktop computers, enabling access to our online services; and
- A customer service station, containing a desktop computer and a printer, offering limited online services and video assistance from one of our employees.

In FY 2013, we launched the program, and 25 partner sites downloaded the Social Security Express icon to the desktops of their public computers. In FY 2014, we expanded our partnership to 168 sites. We partnered with 93 additional sites in FY 2015. In total, 261 partner sites have installed the Social Security Express icon.

In FY 2014, we installed one customer service station in a field office as a proof of concept and implemented three additional customer service stations in three external partner sites. In FY 2015, we added three additional customer service stations, bringing the total to seven.

The customer service stations allow us to offer our services in locations other than field offices, providing an additional vehicle for service delivery to our customers and reducing foot traffic in our field offices. We will evaluate usage levels and customer satisfaction from our proof of concept. If the proof of concept is successful, we will make modifications based on customer feedback and proceed with a pilot.

We also have partnerships with over 50 community locations to provide video service delivery. We plan to identify new video service delivery sites in FY 2016 focused on serving the Native American population, Wounded Warriors, veterans, and people who are disabled.

### Launching a Federal Data Exchange Community of Practice

We initiated and now lead the Federal Data Exchange Community of Practice, facilitating records, data, and other information exchanges across federal agencies. Our collaborative efforts will help build a larger knowledge base, find solutions for data exchange challenges, identify cross-organizational solutions, prioritize and resolve problems, harmonize policy and processes where possible, share best practices, and build a network of federal data exchange partners.

In FY 2015, we developed a list of the most common types of data regularly shared among federal agencies and the best sources for each type. We plan to share the list through the Federal Data Exchange Community of Practice in FY 2016. We created a site on MAX.gov, hosted by OMB, to share documents, agendas, presentations, and contact lists. Our site has a 94 percent enrollment rate. In FY 2015, we added 11 new agencies to the group, expanding the network by 69 percent. In FY 2016, we will develop a list of prioritized activities and objectives. We plan to implement at least two of those prioritized activities in FY 2017.

### Establishing a State Data Exchange Community of Excellence

Since Congress passed the Affordable Care Act in 2010, the Administration has led efforts to standardize public health program eligibility policies, data use, and information technology tools. The standardization will streamline states' public health business processes, improve service delivery, and enhance data accuracy.

In FY 2015, we established a public-private partnership called the State Data Exchange Community of Excellence whose goal is to advance the Administration's one-government approach. The State Data Exchange Community of Excellence will include federal, state, and private stakeholders, including the Department of Health and Human Services, the Administration of Children and Families, the Centers for Medicare and Medicaid Services, the United States Department of Agriculture, Food and Nutritional Services, the American Public Health Services Administration, and Governor-appointed human service administrators. We are finalizing a tri-agency agreement with Health and Human Services and the Department of Agriculture to share our data through a hub that will help states determine a person's eligibility for certain benefits.

In FY 2016, we will work with federal agencies and the American Public Health Services Association to survey and evaluate data exchange needs in each state. We will also help to develop a prioritized list of activities for the State Data Exchange of Excellence. We plan to implement at least two of those activities in FY 2017.

### Expanding the Virtual Lifetime Electronic Record

In April 2009, the DoD and VA launched the [Virtual Lifetime Electronic Record](#) initiative to create a unified lifetime electronic health record for members of the Armed Services. We are working closely with both agencies to ensure we address service members' and veterans' needs as seamlessly as possible when applying for Social Security benefits by fully automating access to medical records.

In FY 2015, we worked with the DoD and VA to:

- Enhance the clinical content available for health information technology (IT) exchange;
- Implemented eAuthorization, an electronic signature on our Authorization to Disclose Information, Form SSA-827, with all health IT partners; and
- Pilot a health IT exchange.

The health IT exchange will provide our veterans, service members, and their families with a high level of customer service and will enable greater decision support for examiners, thereby improving the overall case processing time. The national rollout plan is scheduled for implementation in FY 2016 in collaboration with the DoD.

### Strengthening the Social Security Number Application Process

Enumeration is our process of assigning Social Security numbers and issuing Social Security cards. Each year we receive approximately 16 million applications for original and replacement Social Security cards. Our employees use the Social Security number application process, a web-based system, to record information and evidence submitted with a Social Security number application. This system is available in all field offices (including Social Security card centers) and Foreign Service posts. It also enables employees to correct individuals' Social Security number records.

As resources permit, we will develop and implement the following enhancements to help us enforce enumeration policy:

- Continue to partner with other Federal agencies to ensure the immigration systems and forms we use are up-to-date and in line with policy;
- Increase Social Security number integrity by improving citizenship documentation when appropriate; and
- Enhance policy and procedure enforcement.

These enhancements ensure accuracy in our Social Security number records, which in turn enables us to make proper payments. Further, in line with the Administration's one-government approach, we partnered with the Department of Homeland Security and Department of State to enumerate noncitizens accurately and consistently.

In FY 2015, we will provide additional processing statistics to help track our performance and improve our enumeration workload. In FY 2016, we plan to expand the Social Security number application process to allow for processing under special circumstances or in emergencies.

In FY 2017, we will provide support and updates to the system as needed, based on discussions we have with the Department of Homeland Security and Department of State. Additionally, we will continue to request enhancements to help ensure the system aligns with policy changes. We will provide faster application processing and stronger information security by enabling Foreign Service Posts to transfer applications electronically. Additionally, we will ensure the system continues to align with policy changes.

## Performance Measures – Strategic Objective 1.3

### 1.3a: Minimize the average response time to deliver medical evidence to the VA for wounded warriors and veterans

Fiscal Year	2010	2011	2012	2013	2014	2015	2016	2017
Performance	9.7 days	7.3 days	5.6 days	7.2 days	5.9 days	4.2 business days		
Target					Deliver medical evidence to the VA within an average of 5 days	Deliver medical evidence to the VA within an average of 5 business days	Deliver medical evidence to the VA within an average of 5 business days	Deliver medical evidence to the VA within an average of 5 business days
Target Met					Not Met	Met		

**Results:** We exceeded our FY 2015 target by delivering medical evidence to the VA within an average of 4.2 days.

**Data Definition:** We currently track requests received from the VA for medical evidence. We also track how long it takes us to respond to the request.

**Data Source:** Office of Operations



## Strategic Objective 1.4: Evaluate Our Physical Footprint to Incorporate Improved Service Options

### Vision 2025 Priority: Innovative Organization

Our facility maintenance costs continue to increase despite staff losses. We are concerned about the high upfront costs for facilities and associated services (e.g., rent, utilities, security guard services), especially as more cost-effective and reliable alternatives to in-person service exist. As building maintenance costs continue to increase and customer preferences move to electronic service channels, we are reassessing our facility needs, while still ensuring that we have appropriate levels of in-person service options available.

We are fully committed – now and in the future – to keeping a field office structure providing in-person service for those customers who need or prefer it. Additionally, as technology drives the realignment of our physical footprint, we see opportunities to scale back and colocate some large brick-and-mortar facilities.

### Strategies

- Design space, maintain offices, and reassess the structure of internal facilities to optimize cost and maximize opportunities for improved service delivery; and
- Explore solutions that optimize the operational efficiencies of offices, including colocations.

### Progress Update

We took the following steps in fiscal year (FY) 2015 to evaluate our physical footprint to incorporate improved service options:

- Reduced our usable square feet by 1.34 million from our FY 2012 level.

### Next Steps

- Assess 100 percent of all field office and hearing office new lease actions for possible colocation opportunities;
- Create shared services-claimant only video rooms in field offices to increase hearing capacity without increasing the footprint;
- Continue building judge only video rooms in existing hearing offices to increase hearing capacity without the need to build additional hearing rooms; and
- Increase the number of colocations between hearing offices and field offices.

### Risks and External Factors

The following risks or external factors may affect our efforts:

- The universe of colocation opportunities is limited to the number of lease expirations in any given year:
  - Long-term lease commitments are a barrier to short-term implementation; and
  - Significant lead-time needed to secure new leases.
- Space availability and labor relations issues:
  - Availability of space large enough to colocate in a given market;
  - Compatibility of the Office of Disability Adjudication and Review and Operations service areas; and
  - Complexity of accommodating the different Bargaining Unit agreements with the three separate labor unions representing our field office and hearing office employees.

## Key Initiatives

### Reduce Our Real Estate Footprint

Under guidance issued by the Office of Management and Budget (OMB), agencies are required to create and implement a plan to reduce their real estate footprint. We are committed to adhering to the established baselines while providing excellent customer service.

We will create a five-year plan in FY 2015 to make the most efficient use of our real estate property assets. We will update and submit our plan to OMB each fiscal year. As part of our planning, we will assess all new space actions for colocation opportunities and plan to make the following colocations:

- In FY 2016, we will colocate at least four permanent remote site hearing offices with field offices; and
- In FY 2017, we will colocate at least seven permanent remote site hearing offices with field offices.

## Performance Measure – Strategic Objective 1.4

### 1.4a: Evaluate our physical footprint as described in our OMB-approved Real Property Cost Savings and Innovation Plan

Fiscal Year	2014	2015	2016	2017
<b>Performance</b>	We have issued colocation guidelines to the regions. In FY 2015, we will evaluate each space action for potential colocation opportunities for offices within the same local area whose leases are ending at the same time	Reduced our physical footprint by 1.34 million usable square feet		
<b>Target</b>	Evaluate potential opportunities for collocating and consolidating our public service facilities within and outside of SSA	Reduce our physical footprint from our FY 2012 level by 1.86 million usable square feet		
<b>Target Met</b>	Met	Not Met		

**Results:** While we did not meet our FY 2015 target, we exceeded the Office of Management and Budget requirements to freeze our footprint as of FY 2012. We reduced our physical footprint by 5 percent from our FY 2012 level.

**Data Definition:** Completing the targeted milestones.

**Data Source:** Social Security Administration, Office of Budget, Finance, Quality, and Management

### 1.4b NEW: Assess field and hearing office lease expirations and increase colocation of our field and hearing offices to reduce our physical footprint

Fiscal Year	2015	2016	2017
<b>Performance</b>			
<b>Target</b>		Colocate at least 4 permanent remote site hearing offices with field offices	Colocate at least 7 permanent remote site hearing offices with field offices
<b>Target Met</b>			

**Data Definition:** Completing the targeted milestones.

**Data Source:** Social Security Administration, Office of Disability Adjudication and Review

## Strategic Goal 2: Strengthen the Integrity of Our Programs

Currently, we pay \$78 billion each month in benefits across all our programs. Paying the right person the right amount at the right time is critical, and we take this responsibility very seriously. The payment accuracy rate for our retirement and survivors programs has been over 99 percent for the past several years.

Our disability programs are much more complex to administer, potentially resulting in both overpayments and underpayments:

- **Social Security Disability Insurance** provides benefits to people who cannot work because they have medical conditions expected to last at least one year or result in death. The laws governing this program are complex, and we may not always have timely or accurate information about a beneficiary's medical or work status. Changes in either status may affect continued eligibility for benefits.
- **Supplemental Security Income (SSI)** provides cash assistance to people with limited incomes and resources who are aged, blind, or disabled. A beneficiary's eligibility for payment or the amount of payment can change when his or her living arrangements or income changes. Beneficiaries self-report changes, and reporting delays can result in improper payments.

We are taking a multifaceted approach to ensure we receive accurate information and provide proper payments:

- Using the latest technology to identify fraud and improve debt collection;
- Providing beneficiaries with easy ways to report changes;
- Investing in and enhancing partnerships with our beneficiaries;
- Actively seeking opportunities to share information with other federal and state agencies; and
- Using experts in evaluation methods to review implementation plans for each improper payment initiative.

We want our initiatives to produce clear and measurable outcomes that lead to actionable efforts reducing improper payments and reclaiming overpaid funds.

### Strategic Objective 2.1: Transform the Way We Record Earnings to Enhance Data Accuracy

#### **Vision 2025 Priority: Innovative Organization**

A worker's lifetime earnings determine the amount of his or her Social Security benefits, making it vital that we have accurate earnings records on file. We devote a significant amount of resources to ensure earnings records are accurate.

In fiscal year (FY) 2015, we posted over 275 million earnings items to individuals' records. When we provide workers, employers, and government agencies with the tools they need to accurately report wages, our records are more accurate.

In 2015, employers filed over 89 percent of Forms W-2 electronically. We also received nearly 26 million paper Forms W-2. As we migrate to a more fully electronic earnings record process, we anticipate increased accuracy through fewer manual entries and a more stringent electronic editing process.

We have a multiyear initiative underway that will further modernize our earnings reporting system. This initiative will increase processing capacity and post information faster. In addition, we are working with the Internal Revenue Service (IRS) to enhance earnings data exchanges. Both initiatives will improve wage reporting and make our earnings process more efficient and accurate.

We are also encouraging our customers to verify their earnings information when they review their *Social Security Statements* online or when they receive mailed copies.

## Strategies

- Modernize our earnings system;
- Encourage electronic wage reporting; and
- Encourage workers to review their *Social Security Statements* for earnings accuracy.

## Progress Update

We took the following steps in FY 2015 to transform the way we record earnings to enhance data accuracy (see Key Initiatives and Performance Measures for more details):

- Redesigned software to process Forms W-2 within the Annual Wage Reporting system (AWS);
- Processed larger volumes of earnings data through redesigned AWS:
  - Over 22 million wage items per day;
  - Over 81 million wage items per week; and
  - Exceeded prior tax year volumes of 15 million per day and 72.3 million per week.
- Implemented redesign, platform changes, and business processes into earnings systems resulting in:
  - More efficiency and consistency in service;
  - Improved flow and speed of earnings processes; and
  - Improved accuracy.
- Implemented systems enhancements that are expected to decrease the number of wage reports filed on paper and reduce manual workloads.

## Next Steps

- Continue to modernize and streamline other major components of the Earnings Systems; and
- Continue marketing efforts encouraging people to review their earnings for accuracy.

## Risks and External Factors

The following risk or external factor may affect our efforts to enhance data accuracy:

- Legal restrictions on disclosure of wage reporting data between federal agencies.

## Key Initiatives

### Continue Earnings Redesign

We are redesigning our systems to make our earnings process more efficient and accurate. In addition, we are enhancing earnings data exchanges, improving wage reporting, modernizing our systems, and modifying our software to handle increasing record volumes.

Beginning in FY 2014 and throughout FY 2015, we released several enhancements to the earnings redesign program, continuing our multiyear effort to improve our detection and prevention of potential wage reporting fraud. We replaced outdated technology, streamlined automated business processes, and consolidated and streamlined our earnings reconciliation processes. We also redesigned functionality to process Forms W-2 within the Annual Wage Reporting system.

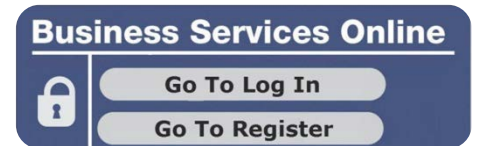
Increased system processing capacity allows the system to post more data to the Master Earnings File (the administrative file used to store earnings data and to determine an individual's eligibility and benefits payment). The increased capacity also enables posting the data earlier in the year and sharing data with the IRS sooner. In addition, earlier rejection of invalid data improves the quality of data used both internally for benefit calculations and externally by the IRS for tax reconciliation.

## Increasing Electronic Wage Report Filing

Annually, we receive more than 3 million paper wage reports from employers containing nearly 26 million paper Forms W-2. Paper wage reports are more error-prone, labor intensive, and expensive to process. Electronic wage reporting is more accurate, but we must update our electronic applications frequently to reflect IRS tax code and tax form revisions.

Planned enhancements for FY 2015 include a self-registration, self-testing process for all new electronic wage reporting web service users. In FY 2016, we are planning a phased expansion of the electronic wage reporting web service, including expanding the electronic wage reporting status function and allowing submitters to find out why a submission was returned. The phased web service expansion will continue in FY 2017.

We will continue using promotional materials, trade publications, and direct contact with employers and third-party submitters (people who submit wages to us on behalf of employers) to encourage electronic wage reporting. Our market tactics for online wage reporting include promotions at conferences and meetings attended by the wage reporting community.



## Performance Measure – Strategic Objective 2.1

### 2.1a: Improve the accuracy and timeliness of the earnings data used to calculate benefits

Fiscal Year	2014	2015	2016	2017
Performance	We released the Annual Wage Reporting system on 02/08/2014	Implemented the redesigned software to process Forms W-2 within the Annual Wage Reporting system		
Target	Complete construction of at least 50% of the redesigned functionality to process Forms W-2 within the Annual Wage Reporting system	Implement the redesigned functionality to process Forms W-2 within the Annual Wage Reporting system by 09/30/2015	Implement the redesigned functionality to process Forms W-2c (Corrections) within the Annual Wage Reporting system	Implement Annual Wage Reporting software to provide earnings data to the IRS earlier in the tax season
Target Met	Met	Met		

**Results:** In FY 2015, we applied the redesigned annual wage reporting software to process Forms W-2.

**Data Definition:** Construction of the redesigned Annual Wage Reporting functionality is defined as the development of the software to meet the high-level requirements for processing Forms W-2.

**Data Source:** The data source is the aggregate of the base-lined, high-level requirements for the redesigned Form W-2 processing within the Annual Wage Reporting system. The software release certification process will document the software implementation.

## Strategic Objective 2.2: Protect the Public's Data and Provide Secure Online Services

### Vision 2025 Priority: Superior Customer Experience

Our mission is to provide the public with high quality, convenient service while maintaining the confidentiality of the public's information. We are committed to safeguarding the information used in our online services as we keep up with increasing service demands. We take the public's trust seriously and take great pride in securing their personal information. We continually strengthen our record protection systems to combat emerging identity threats.

### Strategies

- Ensure strong authentication technologies and appropriate access to information and services;
- Ensure online services have appropriate security features; and
- Join with other federal agencies to aggressively combat identity theft to prevent unauthorized transactions.

### Progress Update

We took the following steps in fiscal year (FY) 2015 to protect the public's data and provide secure online services (see Key Initiatives and Performance Measures for more details):

- Expanded the use of data analytics and technology to detect and prevent online fraud;
- Applied analytical tools to our online services to determine common characteristics and patterns of anomalous behavior based on data from past allegations and known cases of fraud;
- Built a fraud business process and developed new analytical models to support the online Social Security Replacement Card application (limited release in November 2015);
- Established the Office of Anti-Fraud Programs to provide centralized oversight of and accountability for the agency's initiatives to prevent, detect, and deter fraud; and
- Partnered with other Federal agencies to detect, deter, and prevent fraud.

### Next Steps

- Continue to protect the public's data as we expand and continue secure online services; and
- Continue to design a business plan and procure an enterprise-automated solution (tool), which will enable us to identify patterns of fraud, improve functionality with additional data-driven fraud triggers and real time risk analysis, and further integrate technology into our anti-fraud business processes.

### Risks and External Factors

The following risks or external factors may affect our efforts to protect the public's data and provide secure online services:

- Budgetary concerns;
- Unanticipated workload increases; and
- New and emerging threats.

### Key Initiatives

#### Deploy Management System for Personally Identifiable Information and Federal Tax Information

We developed the Enterprise Test Data Management System to manage and purge personally identifiable information and federal tax information in our test and training systems. Our test and training systems are well controlled and have low risk of exposing sensitive public data. While individuals accessing the data are authorized to view it, when fully implemented, the Enterprise Test Data Management System will provide sanitized test data (data modified to conceal a person's identity) to our test environments (development, validation, integration, and training), further minimizing our risk of unnecessary exposure.



When fully implemented, the system will sanitize the Social Security number, Employer Identification Number, telephone number, email, and bank account data consistently across all validation databases.

We released the basic infrastructure in FY 2013, and in FY 2014, we:

- Developed code to sanitize name fields;
- Developed requirements for enhancing a third-party tool we will use to help sanitize names and addresses;
- Designed, developed, and implemented enhancements to the existing Enterprise Test Data Management System to improve performance and usability; and
- Began requirements analysis and design for future enhancements.

In FY 2015, we implemented the code for sanitizing the name and address information. We expect full implementation in FY 2016.

### **Established the Office of Anti-Fraud Programs**

We take our responsibility for detecting, deterring, and preventing fraud very seriously. We have zero tolerance for fraud, and we work tirelessly to protect the American taxpayers and their investment in Social Security.

In November 2014, we established the Office of Anti-Fraud Programs to provide centralized oversight of and accountability of initiatives to prevent, detect, and deter fraud, such as:

- Centralizing anti-fraud data analytics;
- Monitoring and supporting our anti-fraud initiatives;
- Formulating new anti-fraud initiatives;
- Developing consistent anti-fraud policies and processes;
- Aligning our anti-fraud efforts with industry standards; and
- Supporting the Office of the Inspector General's efforts to investigate fraud.

We continue to expand the use of data analytics and technology to detect and prevent fraud. Specifically, we apply analytical tools to our business processes and use models to determine common characteristics and patterns of anomalous behavior based on data we collect from past allegations and known cases of fraud.

Additionally, we developed numerous analytical models to help us identify fraud. We run our analytical models against our data in online services. These models assist in identifying attempted fraud before we make a payment. Our goal is to avoid the "pay and chase" that has plagued benefit-paying agencies for years by being proactive in preventing fraud. We are currently working with a federally funded research development center on an enterprise-based, automated solution to expand the use of anti-fraud analytics to additional agency programs.

## Performance Measures – Strategic Objective 2.2

### 2.2a: Enhance our security features and business processes to prevent and detect fraud

Fiscal Year	2014	2015	2016	2017
<b>Performance</b>	Using Public Facing Integrity Review data, we were able to create and implement the routing transit number blocking process	The fraud referral process was transferred to the newly established Office of Anti-Fraud Programs. We use Public Facing Integrity Review data to create and implement the routing transit number blocking process. <sup>2</sup>		
<b>Target</b>	Expand the Public Facing Integrity Review system to more rapidly detect a greater variety of fraudulent Internet transactions	Increase <i>mySocial Security</i> potential fraud referrals through the Public Facing Integrity Review system to the Office of Operations by 10% (10,295 referrals)	Identify and investigate at least 500 claims presenting characteristics indicative of fraud	Identify and investigate at least 750 claims presenting characteristics indicative of fraud
<b>Target Met</b>	Met	Met		

**Results:** In November 2015, we established the Office of Anti-Fraud Programs. The Office of Anti-Fraud Programs now receives potential fraud referrals through the Public Facing Integrity Review system.

**Data Definition:** Expand functionality by planning, developing, and implementing new or additional reviews for fraud in existing online applications and new online services, as they are made available to the public.

**Data Source:** Public Facing Integrity Review system

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<sup>2</sup> Due to the sensitivity of this information, we cannot include exact numbers.

## Strategic Objective 2.3: Increase Payment Accuracy

### Vision 2025 Priority: Innovative Organization

The American public expects outstanding stewardship of general revenues and the Social Security Trust Funds – and as stewards, we are committed to protecting our programs from waste, fraud, and abuse.

Our most important program integrity tools are continuing disability reviews (CDR), which are periodic reevaluations to determine if Social Security Disability Insurance and Supplemental Security Income (SSI) beneficiaries are still disabled, and SSI redeterminations, which are periodic reviews of non-medical eligibility factors such as income and resources.

We estimate that CDRs conducted in 2016 will yield net Federal program savings over the next ten years of roughly \$9 on average per \$1 budgeted for dedicated program integrity funding, including Old-Age and Survivors Insurance, SSI, Medicare, and Medicaid program effects. Similarly, we estimate that nonmedical redeterminations conducted in 2016 will yield a return on investment of about \$4 on average of net Federal program savings over ten years per \$1 budgeted for dedicated program integrity funding, including SSI and Medicaid program effects.

We will continue to perform CDRs and SSI redeterminations, and enhance our program integrity efforts in other areas to improve payment accuracy for our programs. We will:

- Simplify our work incentive policies and procedures;
- Continue to partner with financial institutions to expand on the success of our Access to Financial Institutions initiative to identify financial resources that often go unreported;
- Implement new guidance and expand existing programs to recover more debt;
- Pilot new computer technologies and data searches; and
- Use new computer technologies to analyze agency data in new ways, focusing on the most error-prone aspects of our programs.

Representative payees (people or organizations who receive payments on behalf of beneficiaries who cannot manage their own benefits) play a significant role in many beneficiaries' lives. We are always exploring ways to better identify, screen, and appoint representative payees. We will improve how we monitor representative payees to prevent benefit misuse. We will also coordinate research and initiatives with other federal agencies that serve similar populations.

### Strategies

- Collaborate with other federal agencies, such as the Department of Veterans Affairs and Centers for Medicare and Medicaid Services, to find innovative ways to prevent and reduce improper payments;
- Increase efforts to recover overpayments;
- Enhance predictive models and automation tools to help identify error-prone aspects of benefit eligibility;
- Expand use of data analytics to detect fraud and payment errors; and
- Streamline the representative payee program to better identify potential misuse of benefits.

### Progress Update

We took the following steps in FY 2015 to increase payment accuracy (see Key Initiatives and Performance Measures for more details):

- Expanded the use of data analytics and improved technology to:
  - Identify patterns of fraud in our programs; and
  - Prevent payment errors by identifying missed entitlements to benefits.
- Through data exchange partnerships with the Centers for Medicare and Medicaid Services, we have:
  - Identified over \$49 million in estimated incorrect payments;
  - Referred 1,334 cases to the Office of Inspector General for investigation; and
  - Uncovered 272 out-of-country cases.
- Implemented improvements to the Pre-effectuation Review (PER) model to help identify the most error-prone adult SSI DDS allowances for review;

- Identified 1,352 previously unreported deaths of U.S. beneficiaries abroad, resulting in potential overpayment savings of almost \$7 million;
- Implemented a change to our address verification business process, allowing us to notify more delinquent debtors of a potential offset; and
- Expanded the payee monitoring program to better identify potential benefit misuse – expected to net an increase of 300 additional reviews over FY 2014.

### Next Steps

- Monitor PER workloads on a weekly basis to ensure models and associated business processes are working correctly and as intended;
- Research the use of quarterly reported earnings data in the CDR predictive model to prioritize CDRs that are likely to result in suspension or termination;
- Develop systems, policy, and training to support the non-home real property process;
- Expand automated reciprocal death data exchanges to as many partner countries as possible; and
- Publish agency operating instructions to improve the business process for transmitting information to and from the Department of Veterans Affairs.

### Risks and External Factors

The following risks or external factors may affect our efforts to increase payment accuracy:

- Relying on SSI recipients to timely report changes in their financial circumstances that may change their benefit amounts;
- The inherent complexity of our Title II and Title XVI programs; and
- Balancing high workload demands and program integrity activities with staffing resources.

### Key Initiatives

#### Promoting Use of the Supplemental Security Income Telephone Wage Reporting System and the Supplemental Security Income Mobile Wage Reporting

Unreported and untimely reported wages continue to be a major source of payment error in the SSI program. To improve timely reporting, we implemented the SSI Telephone Wage Reporting system. SSI telephone wage reporting increases efficiency because it reduces unnecessary visits to the field office, lessens manual keying errors, and allows us to automatically process wage reports.

Beneficiaries, their spouses and parents, and their representative payees can report monthly wages directly into the SSI system via a combination of touch-tone entry and voice-recognition software.

During recruitment activities for the SSI Telephone Wage Reporting system and the SSI Mobile Wage Reporting program, we encourage people to sign up for monthly email or text reminders to report monthly wages. We also include this reminder option in our online public information materials. We continue to increase the field office recruiting efforts during claims, redetermination interviews, pre-effectuation reviews, or other wage-related post-eligibility contacts.



In FY 2014, we began allowing people to report wages at any time during the month rather than just the first six days of the month and began using GovDelivery as a means for SSI wage reporters to sign up for email or text reminders. GovDelivery is a web-based public sector communications platform that sends notices, emails, and reminders to customers. As a result, we processed 30 percent more reports using the SSI Telephone Wage Reporting system and SSI Mobile Wage Reporting system than we processed in calendar year 2013. Much of this increase was due to the nationwide implementation of the SSI Mobile Wage Reporting program.

In September 2015, we received 78,970 automated wage reports, an approximately 23% increase over September 2014.

### **Conducting Supplemental Security Income Redeterminations**

Changes in beneficiaries' living arrangements or the amount of their income and resources can affect both their eligibility for SSI and the amount of their payments. To ensure the accuracy of SSI payments, we conduct redeterminations. In FY 2015, we plan to conduct 2.25 million redeterminations and 2.62 million redeterminations in FY 2016.

### **Using Predictive Modeling in the Continuing Disability Review Enforcement Operation**

The Continuing Disability Review Enforcement Operation identifies Social Security disability beneficiaries whose earnings put them at risk of receiving overpayments.

We developed and piloted a predictive model to identify cases that have a high likelihood of receiving overpayments. We prioritize these cases for work-related continuing disability reviews. These reviews determine if the beneficiary's eligibility for benefits has changed.

By prioritizing the work-related continuing disability reviews, we identified and avoided potential overpayments more quickly. In FY 2015, within the first six months of processing, we completed approximately 256,000 work-related continuing disability reviews, resulting in 47,500 cessations or suspensions with overpayments.

We plan to update and re-estimate the predictive model with more recent information so the model parameters capture any recent demographic, program, and economic changes. In addition, we are considering including quarterly earnings data from the Office of Child Support and Enforcement in our model to shorten the response time.

### **Using Predictive Modeling in the Redetermination Process**

We use a statistical scoring model to identify and prioritize redetermination cases having a high likelihood of error. The statistical model uses income, resources, and living arrangement variables to predict likely SSI overpayments.

In FY 2014, the cases we completed resulted in the prevention and recovery of an estimated \$3.9 billion in expected retroactive and five-year future recurring SSI overpayments. If we had relied on a random selection for 2014 cases, rather than using a predictive model, projections indicate that the corresponding savings would be only \$2.4 billion for this period. Results for FY 2015 will be available in February 2016.

We continue to improve our predictive statistical modeling and data mining techniques to determine the potential value of such data in our SSI redetermination modeling and selection process. We will use these advanced analytical techniques to focus on ways to enhance our current redetermination selection model and potentially the redetermination process.

### **Expanding the Access to Financial Institutions**

Excess resources in financial accounts are a leading cause of SSI payment errors. Access to Financial Institutions (AFI) uses an electronic process to verify bank account balances with financial institutions to help determine SSI eligibility and payment amount. In addition to verifying alleged accounts, the process may detect undisclosed accounts by using a geographic search to generate requests to other financial institutions. Along with preventing overpayments, the AFI process will help us eliminate ineligible applicants at the beginning of the application process and reduce the workload in the disability determination services (DDS) offices.

We currently use the AFI system in all 50 states, the District of Columbia, and the Commonwealth of the Northern Mariana Islands. In FY 2013, we lowered the AFI liquid resources (e.g., cash or bank accounts) threshold from \$750 to

\$400 and increased the number of bank searches. This program has proven very cost effective and useful in identifying undisclosed accounts.

We have not yet fully implemented the AFI process. We define full implementation as using AFI on every potential SSI application and redetermination, conducting bank searches, and fully integrating the process with our systems.

### **Expanding Our Cooperative Disability Investigations Program**

Our Cooperative Disability Investigations units work collaboratively with the Office of Inspector General, DDS offices, and state and local law enforcement agencies to resolve allegations of fraud in our disability programs. Cooperative Disability Investigations units help prevent payments to people who are not disabled and reduce improper payments to beneficiaries who have failed to report medical improvement or work activity.

The units have proven to be vital tools in identifying fraud and preventing incorrect disability payments. Since their inception in 1998 through FY 2015, our Office of the Inspector General estimates Cooperative Disability Investigations efforts nationwide generated \$3.2 billion in projected savings to our Social Security disability and SSI programs and \$2.1 billion to non-SSA programs, such as Medicare and Medicaid.

In FY 2014, we opened Cooperative Disability Investigations units in Baltimore, Maryland and Detroit, Michigan. In FY 2015, we expanded the program by adding another nine units in Providence, RI; Little Rock, AK; Milwaukee, WI; Des Moines, IA; Miami, FL; Birmingham, AL; Charleston, WV; St. Paul, MN; and Raleigh, NC. We currently have 37 Cooperative Disability Investigations units covering 31 states, Washington, DC, and the Commonwealth of Puerto Rico.

We plan to add up to three additional units in FY 2016, including the unit that opened in Washington, DC in October 2015.

In FY 2017, we plan to expand the program as need and funding permits.

### **Improving the Death Reporting System Process**

We are enhancing and streamlining our death reporting system to ensure we comply with applicable laws and policies, reduce improper payments, prevent improper release of personally identifiable information, and improve consistency of data in our records. Ultimately, our goal is to have one official agency source of death information available to all our systems.

In FY 2014, we provided a new user interface for death reporting and collecting new, comprehensive management information.

We are on schedule to complete the following by the end of FY 2015:

- Evaluate policies used in our current batch processing to determine priority, matching criteria for identity, error messaging and editing;
- Redesign the batch processing approach based on the evaluation;
- Begin consolidating external death data we receive into a central entry point and update the data into our NUMIDENT database before it is used by other systems; and
- Produce management information reports using production data to evaluate data quality and identify actions needed to improve quality.

Our plans for FY 2016 include:

- Streamline inputting and collecting internal death information from multiple sources into one person-centered path;
- Use the NUMIDENT database as the authoritative source of death data; and
- Provide additional management information reporting.

In FY 2017, we will evaluate the work completed and determine if further enhancements are needed.

### **Implementing Data Exchange and Verification Online**

We have a mission-critical need to share data with partners such as federal, state, local, and foreign government agencies, as well as court systems, the medical community, and employers to help ensure we have correct information. We maintain over 2,500 electronic information exchanges. We provide and receive data essential in making eligibility and entitlement decisions for us and other federal and state agencies.

We implemented the Data Exchange and Verification Online application in FY 2013 to modernize our existing data exchange and verification systems into a new centralized application. The new system is more efficient and enables us to respond more quickly to customized requests and legislative mandates.

During FY 2015, we implemented enhancements begun in FY 2014, as well as began planning and analysis for additional enhancements to the Social Security number verification process. We also redesigned our architecture to support web services, an enhancement that improves access for partnering agencies and supports the one-government approach.

In FY 2016 and 2017, we will continue our planning and implementation of additional data exchanges and enhancements.

### **Implementing Direct Deposit Auto-Enrollment Fraud Prevention**

In an effort to prevent redirection of beneficiaries' payments to another account without their knowledge, we created the direct deposit auto-enrollment fraud prevention service. This service allows beneficiaries who have been victims of fraud, or who think they may become victims in the future, to block changes to their payment information. People who block account changes must come into a field office to make direct deposit or address changes.

### **Implementing New Tools for Debt Collection**

Although we strive to pay benefits accurately and on time, the complexity of our programs and dependence on beneficiaries to report changes can lead to overpayments. When overpayments occur, we use different debt collection techniques (e.g. payment withholding, Treasury Offset Program, Credit Bureau Reporting, Cross Program Recovery) to recover these overpayments.

We continue to enhance our systems to recover program debt. In FY 2015, we improved our External Collection Operation system by implementing an address verification feature. As a result, we have the capability to notify more individuals of potential collection actions. We also are developing another feature that will allow us to store notices in our Online Retrieval System, enabling staff to access the notice during calls from the beneficiary.

### **Implementing Automatic Earnings Reappraisal Operation Delay Pilot**

Since FY 2013, we have used our predictive model to score all pending work-related continuing disability reviews to identify cases with a high risk of incurring large work-related overpayments. We implemented a pilot scoring approach, which showed that we processed the sampled cases more quickly, preventing an even larger overpayment, and properly prevented the release of an underpayment. In FY 2014, the pilot continued to be successful with nearly 15,000 sampled disability beneficiaries.

In FY 2016, the selection will include approximately 12,000 beneficiary records for a recomputation delay. We will evaluate this sample in spring 2016. We will also select a new sample based on an enhanced predictive model to prioritize work-related continuing disability reviews.

We expect an average overpayment exceeding \$20,000 for approximately 20 percent of the pilot cases. We expect to process the sampled cases more quickly, preventing an even larger overpayment. The expected outcomes include increased efficiency of operations and improved payment accuracy.

### **Adding Anti-Fraud Messages in Notices**

Over the past two years, we have been working to add new language to our notices to report suspected fraud and to publicize Office of the Inspector General's Fraud Hotline and website. The anti-fraud language will be included in nearly 300 million notices annually: our manually prepared and automated notices, retirement and disability cost-of-living adjustment notices, disability determination services notices, and most Office of Disability Adjudication and Review notices.



## Performance Measures – Strategic Objective 2.3

### 2.3a APG: Reduce the percentage of improper payments made under the SSI program (Agency Priority Goal)

Fiscal Year	2010	2011	2012	2013	2014	2015	2016	2017
Performance	9.1%	9.1%	8.1%	9.3%	8.5%	Data available April 2016		
Target					No more than 6.2% of all payments made under the SSI program are improper payments (i.e., overpayment and underpayments)	No more than 6.2% of all payments made under the SSI program are improper payments (i.e., overpayment and underpayments)		
Target Met					Not Met	TBD		

**Results:** We did not meet our FY 2014 target. Our FY 2015 performance data is not available until April 2016. We will discuss our FY 2015 performance in next year's report.

**Data Definition:** We determine the SSI payments free of overpayment and underpayment error by an annual review of a statistically valid sample of all payments issued. We base the payment accuracy on a non-medical review of sampled individuals who received SSI payments during the fiscal year. We determine the overpayment accuracy rate by dividing the total overpayment error dollars by the total dollars paid for the fiscal year and subtracting this percentage from 100 percent. We determine the underpayment accuracy rate by dividing the total underpayment error dollars by the total dollars paid for the fiscal year and subtracting this percentage from 100 percent.

**Data Source:** SSI Payment Accuracy (i.e., Stewardship) Report



### 2.3b: Maintain a high accuracy rate of payments made through the Old-Age, Survivors, and Disability Insurance program to minimize improper payments

Fiscal Year	2010	2011	2012	2013	2014	2015	2016	2017
<b>Performance</b>	99.6% (O/P) 99.8% (U/P)	99.7% (O/P) 99.9% (U/P)	99.8% (O/P) 99.9% (U/P)	99.8% (O/P) 99.9% (U/P)	99.5% (O/P) 99.9% (U/P)	Data available April 2016		
<b>Target</b>	99.8% (O/P) 99.8% (U/P)	99.8% (O/P) 99.8% (U/P)	99.8% (O/P) 99.8% (U/P)	99.8% (O/P) 99.8% (U/P)		99.8% (O/P) 99.8% (U/P)	99.8% (O/P) 99.8% (U/P)	99.8% (O/P) 99.8% (U/P)
<b>Target Met</b>	Not Met Met	Not Met Met	Met Met	Met Met		TBD		

**Results:** Our FY 2015 performance data is not available until April 2016. We will discuss our FY 2015 performance in next year's report.

**Data Definition:** We determine Old-Age, Survivors, and Disability Insurance payment free of overpayment and underpayment error by an annual review of a statistically valid sample of the beneficiary rolls. We determine the overpayment accuracy rate by dividing the total overpayment error dollars by the total dollars paid for the fiscal year and subtracting this percentage from 100 percent. We determine the underpayment accuracy rate by dividing the total underpayment error dollars by the total dollars paid for the fiscal year and subtracting this percentage from 100 percent.

**Data Source:** Old-Age, Survivors, and Disability Insurance Stewardship Report

### 2.3c APG NEW: Improve the integrity of the SSI program by ensuring that 95 percent of our payments are free of overpayment (Agency Priority Goal)

Fiscal Year	2010	2011	2012	2013	2014	2015	2016	2017
<b>Performance</b>	93.3% accuracy rate	92.7% accuracy rate	93.7% accuracy rate	92.4% accuracy rate	93.0% accuracy rate	Data available April 2016		
<b>Target</b>							95% accuracy rate	95% accuracy rate
<b>Target Met</b>								

**Results:** Payment accuracy is one of our highest priorities. As a result, we established challenging stretch targets with the understanding that our historical results are lower than our goal.

**Data Definition:** We determine the overpayment accuracy rate by dividing the total overpayment error dollars by the total dollars paid for the fiscal year and subtracting this percentage from 100 percent. We determine the underpayment accuracy rate by dividing the total underpayment error dollars by the total dollars paid for the fiscal year and subtracting this percentage from 100 percent.

**Data Source:** Title XVI Payment Accuracy (Stewardship) Report

### 2.3d: Complete the budgeted number of full medical continuing disability reviews (Budgeted Workload Measure)

Fiscal Year	2010	2011	2012	2013	2014	2015	2016	2017
Performance	324,567	345,492	443,233	428,568	525,875	799,013		
Target			435,000	422,000	510,000	790,000	850,000	1,100,000
Target Met			Met	Met	Met	Met		

**Results:** We exceeded our FY 2015 target.

**Data Definition:** The number of full medical continuing disability reviews completed in the fiscal year. This number represents only full medical reviews completed by state DDS offices and other agency components and cases where we initiated a review but could not complete one because the individual failed to cooperate.

**Data Source:** Continuing Disability Review Tracking Files

### 2.3e: Complete the budgeted number of Supplemental Security Income (SSI) non-medical redeterminations (Budgeted Workload Measure)

Fiscal Year	2010	2011	2012	2013	2014	2015	2016	2017
Performance	2,465,878	2,456,830	2,624,170	2,634,183	2,627,518	2,266,993		
Target	2,422,000	2,422,000	2,622,000	2,622,000	2,622,000	2,255,000	2,522,000	2,822,000
Target Met	Met	Met	Met	Met	Met	Met		

**Results:** We exceeded our FY 2015 target.

**Data Definition:** The number of non-disability SSI redeterminations completed in the fiscal year. This number includes scheduled (i.e., identified for review through profiling) and unscheduled reviews (i.e., reviewed because of changes that may affect payment), as well as targeted redeterminations (i.e., limited issue reviews).

**Data Source:** Integrated SSA Unified Measurement System Counts Report

## Strategic Goal 3: Serve the Public through a Stronger, More Responsive Disability Program

From fiscal year (FY) 2007 to FY 2015, initial disability claims increased about 10 percent, and our hearings workload increased over 30 percent. In FY 2015, our average processing time for hearing requests was 480 days, and the number of hearings pending was over one million. Although the agency made measurable progress through 2011 toward eliminating the hearings backlog, severe budget cuts combined with other key factors began to affect our progress adversely. Due to budget constraints, we were unable to open new hearings locations, and we continued to face difficulty in hiring a sufficient number of qualified administrative law judges. As a result, wait times for a disability hearing began to rise again.

While our customers expect us to make timely decisions, they also expect us to make the right decisions, appropriately and consistently applying our rules and regulations. We will continue to balance timeliness with an emphasis on quality and consistency in decision-making. We continue to look for ways to strengthen policies, improve processes, and increase the use of automation.

We recently received our second Deming Award for innovative training – this one for our data-driven, skills-based training program for administrative law judges, which focused on the critical thinking and analytical skills involved in applying our policies. To ensure the special training achieved the desired results, we developed a detailed review of decisional quality, comparing the pre-training hearing decisions to post-training hearing decisions against 84 metrics. After training, we found a 5 percent or greater improvement in 35 of the 84 performance metrics and a 2 - 4.99 percent improvement in 14 of the 84 metrics. Statistically speaking, this training had a significant impact on improving our administrative law judges' performance.

We also strive to provide timely and appropriate services to beneficiaries. We plan to meet the needs of our disability beneficiaries by increasing opportunities for those who want to return to work and by collaborating with other federal agencies to coordinate our disability programs.

### Strategic Objective 3.1: Improve the Quality, Consistency, and Timeliness of Our Disability Decisions

#### *Vision 2025 Priority: Innovative Organization*

We continuously strive to improve the timeliness, quality, and consistency of our disability processing times and decisions. We need to make sure our decisions are accurate and made at the earliest possible point in our process. We also need to ensure our policies are applied consistently across the country.

#### Strategies

- Expand use of management information to identify training needs and areas for improvement;
- Broaden use of case-analysis tools;
- Expand use of predictive modeling;
- Simplify policies;
- Collaborate with Bureau of Labor Statistics to collect updated occupational information; and
- Formalize our pre-decisional quality review processes to increase national uniformity.

#### Progress Update

The Social Security Administration, in consultation with the Office of Management and Budget, has highlighted this objective as a **focus area for improvement**. We took the following steps in FY 2015 to improve the quality, consistency, and timeliness of our disability decisions (see Key Initiatives and Performance Measures for more details):

- Completed Administrative Law Judge (ALJ) focus reviews to provide ALJs with feedback and training resources to improve the quality of decisions;

- Added the ability for all sites to process electronic adult initial continuing disability review in the electronic case analysis tool;
- Released the Electronic Bench Book version 5.0;
- Established a medical experts committee to advise on advancements relevant to making disability decisions;
- Made the inline quality review process more comprehensive;
- Increased hearing capacity by adding additional video hearing sites;
- Completed deliverables on the Bureau of Labor Statistics project; and
- Prepared for the receipt of data collected by the Bureau of Labor Statistics in September 2015.

### Next Steps

- Examine opportunities to develop new applications to address existing and emerging management information needs;
- Continue leveraging management information to identify training needs;
- Add functionality to the Electronic Case Analysis Tool to support additional claim types;
- Develop more functionality in the Electronic Bench Book;
- Continue development and testing of predictive modeling projects in the Office of Disability Adjudication and Review;
- Update research base for the vocational factors considered in disability evaluations; and
- Develop and submit at least three rules for public comment, five final rules, and three Social Security Rulings to update the medical listing of impairments.

### Risks and External Factors

The following risks or external factors may affect our efforts to improve the quality, consistency, and timeliness of our disability decisions:

- Hiring sufficient ALJs;
- Sufficient resources to add new functionality to our electronic tools;
- Ability to recruit and retain qualified data analytics staff to fill predictive modeling and data analysis gaps;
- Balancing high workload demands and quality assurance activities with staffing resources; and
- Ability to recruit and retain a skilled staff to process workloads.

### Key Initiatives

#### Enhancing the Electronic Claims Analysis Tool

We continue to enhance our web-based Electronic Claims Analysis Tool, which guides adjudicators through the sequential evaluation process for determining disability. Throughout the application, there are links to the policy that support each step of the process. The tool produces a detailed, policy-compliant explanation of the determination and stores the supporting documentation. A subsequent reviewer can then review the explanation to understand the decision maker's analysis and conclusions throughout the adjudication processes.

All disability determination services sites use the tool for initial and reconsideration level disability claims. In FY 2015, we enhanced functionality for processing electronic adult initial level continuing disability reviews. In FY 2016, we plan to add functionality to process childhood continuing disability reviews, as well as add enhancements in response to policy changes and input from its users. In FY 2017, we plan to add functionality to process adult reconsideration continuing disability reviews.

#### Expanding Use of Electronic Bench Book

The Electronic Bench Book is a policy compliant, web-based application that aids in documenting, analyzing, and adjudicating disability hearing cases consistently with our regulations. The Electronic Bench Book allows users to perform file reviews, capture hearing notes, and document decisional instructions. The Electronic Bench Book guides users through each step of the sequential evaluation process. We expect the systematic process will reduce errors,

improve consistency, and reduce remands to the Appeals Council while helping enhance and execute agency plans to modernize our systems.

Approximately 2,200 unique hearing office users are accessing the Electronic Bench Book each week and administrative law judges are using it to process decisional instructions on approximately 1,500 cases per week. Enhancements released in April 2015 enabled users to generate a case information summary with a single click. Additional backend and performance enhancements were implemented in June 2015.

In FY 2016, we plan to deliver a decision writing feature that fully integrates with MS Word giving decision writers both pre-population of some of the decision language as well as full word processing and editing capabilities. We also plan to streamline the application for ease of use and work on adding more templates.

In FY 2017, we plan on adding more templates and implementing instruction refinements.

### **Developing an Occupational Information System**

Currently, we rely on occupational information found in the Department of Labor's Dictionary of Occupational Titles to determine whether adult disability applicants can do their past work or any other work. The Department of Labor no longer updates its Dictionary of Occupational Titles because a new job placement tool called the Occupational Information Network has replaced it.

We have been working with the Bureau of Labor Statistics to develop a new web-based occupational information system. Our new web-based system will be easier to use and will increase the quality of disability decisions by providing current information about specific job requirements. Unlike the old system, which was a job placement tool, the new system will contain information needed to help us determine disability.

The new system will contain information about occupations' specific vocational preparations, physical demands, and environmental conditions. Unlike the prior system, the new system will contain the mental and cognitive requirements of occupations, enabling more standardized decisions for claimants with mental impairments.

Our policy experts worked with the Bureau of Labor Statistics in 2013 to define current mental and cognitive work demands. In 2014, the Bureau of Labor Statistics started testing the collection of the mental and cognitive work demands.

In early FY 2015, we conducted a large-scale preproduction test that included all data elements. In the summer of 2015, testing included direct observation of several occupations to help determine if the data collection methodology is valid. In September 2015, we used production data in disability adjudication. Fully populating the new system with occupational data will take about three years.

In FY 2016, we will continue analyzing the data from the FY 2015 preproduction test. We will use the data to develop a new information technology platform. We are planning a limited implementation in FY 2017. Testing and further reviews will continue into FY 2019. Full implementation is scheduled for late FY 2019.

### **Updating the Medical Listing of Impairments**

The medical Listing of Impairments (Listings) is one of the most effective tools used to make disability decisions. The Listings allow us to find a claimant disabled when his or her impairment meets specified medical criteria, without the need to consider age, education, or work experience. The Listings improve the consistency and accuracy of our decisions throughout all levels of the disability process.

We update the Listings on a three-to-five year cycle. During each cycle, we seek input from medical experts and other stakeholders to ensure the Listings reflect current approaches in medicine, science, technology, and the work environment.

In FY 2014, we published four rules for public comment, one final rule, and three Social Security Rulings in an effort to update and revise medical policy. In FY 2015, we developed and submitted four final rules and one Social Security Rulings for the medical listings for publication in the Federal Register. In both FY 2016 and FY 2017, we plan to develop and submit four final rules, two Social Security Rulings, and targeted updates for the medical listings for publication in the Federal Register.

### **Conducting Inline Quality Reviews**

The inline quality review of hearing level claims promotes consistency and continuous improvement in case processing by ensuring that:

- Case files are properly prepared and scheduled;
- Records are adequately developed; and
- Draft decisions are legally sufficient.

We initially conducted inline quality reviews on cases where senior attorney adjudicators drafted fully favorable decisions and on cases where files were prepared and ready to be scheduled for a hearing. We began the review in 2010, and in November 2013, we expanded the reviews to include cases drafted by decision writers. We increased the number of inline quality reviews from 2,590 in FY 2013 (0.4 percent of all hearing decisions) to 13,258 in FY 2014 (2.4 percent of all hearing decisions).

In FY 2015, we expanded the list of questions reviewers must answer when deciding if errors exist. There are now more than 100 questions. Because the reviews are more comprehensive than before, we are able to address more issues proactively. In FY 2015, we conducted almost 13,000 reviews (2.4 percent of all hearing decisions). Additionally, analyzing the findings from the reviews enables us to identify trends and areas for targeted training.

In FY 2016 and FY 2017, we will continue to review support staff work for quality and policy compliance. We also plan to explore adding more quality review specialists, as budgets permit.

### **Reducing the Pending at the Appeals Council**

As we decide more cases at the hearing level, the Appeals Council receives more requests for review of hearing decisions. Historically, we received approximately 100,000 requests for review annually. However, from FY 2011 until FY 2013, requests for reviews grew to 175,000 annually. While we saw a reduction in requests to 155,000 in FY 2014 and 149,000 for FY 2015, we finished FY 2015 with more than 150,000 cases waiting for review.

The Appeals Council replaced staff losses in FY 2015, and we continue to seek resources to expand the Appeals Council to address customer wait times.

We are focusing on decreasing the percentage of pending Appeals Council requests for review over 365 days old. In FY 2014, we completed about 162,000 Appeals Council requests for review, and in FY 2015, we completed over 150,000 cases. We will continue to adjust Appeals Council staff levels to reduce the Appeals Council backlog and meet any changes in capacity at the DDS and the hearings levels.

### **Hire Sufficient Administrative Law Judges to Ensure Public Access to Agency Services**

From FY 2008 to FY 2010, the Office of Disability Adjudication and Review made significant progress in reducing the pending of claimants waiting for an Administrative Law Judge (ALJ) hearing. However, our inability to hire ALJs in sufficient numbers due to the Office of Personnel Management (OPM) delays coupled with the Federal Government shutdown and budget constraints caused a public service crisis. Now more than one million claimants are waiting for a hearing, more than any other time in history.

We received a new list of ALJ candidates from the OPM in March 2014, but the lengthy hiring process resulted in us beginning FY 2015 with 35 fewer judges than we had at the beginning of FY 2014. We hired more ALJs as FY 2015 progressed, though not as many as we had budgeted for due to hiring setbacks. We ended the year with nearly 1,530 ALJs on duty, about 85 more than we had at the beginning of the year.

We expect to bring our pending cases below one million by the end of FY 2017.

## Performance Measures – Strategic Objective 3.1

### 3.1a: Ensure the quality of our decisions by achieving the DDS net accuracy rate for initial disability decisions

Fiscal Year	2010	2011	2012	2013	2014	2015	2016	2017
Performance	98% net accuracy	98% net accuracy	98% net accuracy	98% net accuracy	98% net accuracy	98% net accuracy		
Target	97% net accuracy	97% net accuracy	97% net accuracy	97% net accuracy	97% net accuracy	97% net accuracy	97% net accuracy	97% net accuracy
Target Met	Met	Met	Met	Met	Met	Met		

**Results:** We have consistently met the target for this measure since FY 2010.

**Data Definition:** Net accuracy is the percentage of correct initial state disability determinations and is based on the net error rate (i.e., the number of corrected deficient cases with changed disability decisions), plus the number of deficient cases not corrected within 90 days from the end of the period covered by the report, divided by the number of cases reviewed.

**Data Source:** Disability Quality Assurance Databases

### 3.1b: Increase our ability to provide timely decisions by reducing the percentage of pending Appeals Council requests for review 365 days or older

Fiscal Year	2010	2011	2012	2013	2014	2015	2016	2017
Performance			88%	91.1%	84%	82%		
Target			80% of cases pending less than 365 days	81% of cases pending less than 365 days	79% of cases pending less than 365 days	80% of cases pending less than 365 days	81% of cases pending less than 365 days	82% of cases pending less than 365 days
Target Met			Met	Met	Met	Met		

**Results:** We exceeded our FY 2015 target. At the end of FY 2015, 82 percent of our cases were pending less than 365 days. We have consistently met the targets for this measure since FY 2012.

**Data Definition:** The percentage of Appeals Council cases that are pending less than 365 days at the end of the fiscal year. The percentage is derived by dividing the number of Appeals Council cases pending 365 days or more by the total number of Appeals Council cases pending.

**Data Source:** Appeals Review Processing System

### 3.1c APG NEW: Improve customer service by reducing the wait time for a hearing decision (Agency Priority Goal)

Fiscal Year	2015	2016	2017
Performance			
Target		Decide 99% of the cases that begin the fiscal year at 430 days old or older	Decide 99% of the cases that begin the fiscal year 365 days old or older
Target Met			

**Data Definition:** For FY 2016, we will decide 99 percent of those cases that are 430 days old or older at the beginning of the fiscal year. For FY 2017, we will decide 99 percent of those cases that are 365 days old or older at the beginning of the fiscal year. We derive the percentage by dividing the total number of those targeted cases disposed during the fiscal year by the total number of those targeted cases identified during the fiscal year.

**Data Source:** Case Processing and Management System

### 3.1d: Complete the budgeted number of initial disability claims (Budgeted Workload Measure)

Fiscal Year	2010	2011	2012	2013	2014	2015	2016	2017
Performance	3,161,314	3,390,936	3,206,869	2,987,883	2,861,895	2,759,432		
Target	3,081,000	3,273,000	3,173,000	2,962,000	2,947,000	2,767,000	2,695,000	2,810,000
Target Met	Met	Met	Met	Met	Not Met	Not Met		

**Results:** We did not meet our FY 2015 target.

**Data Definition:** The number of Social Security and SSI initial disability claims that state DDS offices and other agency components complete in the current fiscal year up to the budgeted number.

**Data Source:** National DDS System and Disability Operational Data Store



### 3.1e: Complete the budgeted number of disability reconsideration claims (Budgeted Workload Measure)

Fiscal Year	2010	2011	2012	2013	2014	2015	2016	2017
Performance	735,067	828,010	808,521	803,194	757,198	723,485		
Target			787,000	787,000	778,000	739,000	702,000	715,000
Target Met			Met	Met	Not Met	Not Met		

Results: We did not meet our FY 2015 target.

**Data Definition:** The number of Social Security and SSI disability claims completed at the reconsideration level in the state DDS offices and other agency components in the current fiscal year up to the budgeted number.

**Data Source:** National DDS System and Disability Operational Data Store

### 3.1f: Complete the budgeted number of hearing requests (Budgeted Workload Measure)

Fiscal Year	2010	2011	2012	2013	2014	2015	2016	2017
Performance	737,616	795,424	820,484	793,580	680,963	663,129		
Target	725,000	815,000	875,000	793,000	735,000	727,000	703,000	784,000
Target Met	Met	Not Met	Not Met	Met	Not Met	Not Met		

Results: We did not meet our FY 2015 target.

**Data Definition:** The number of hearing requests completed in the current fiscal year.

**Data Source:** Case Processing Management System

### 3.1g: Achieve the target number of initial disability claims pending (Budgeted Workload Measure)

Fiscal Year	2010	2011	2012	2013	2014	2015	2016	2017
Performance	842,192	759,023	707,700	698,127	632,656	621,315		
Target	1,041,000	845,000	861,000	804,000	642,000	621,000		
Target Met	Met	Met	Met	Met	Met	Not Met		

Results: We made very good progress in reducing initial disability claims pending.

**Data Definition:** The number of Social Security and SSI initial disability claims pending in state DDS offices and other agency components at the end of the fiscal year.

**Data Source:** National DDS System and Disability Operational Data Store

### 3.1h: Achieve the target number of disability reconsiderations pending (Budgeted Workload Measure)

Fiscal Year	2010	2011	2012	2013	2014	2015	2016	2017
Performance	157,977	164,049	197,788	173,472	170,255	143,540		
Target			184,000	220,000	174,000	143,000		
Target Met			Not Met	Met	Met	Not Met		

**Results:** We came very close to meeting our target for FY 2015.

**Data Definition:** The number of Social Security and SSI disability claims pending at the reconsideration level in state DDS offices and other agency components at the end of the fiscal year.

**Data Source:** National DDS System and Disability Operational Data Store

### 3.1i: Average processing time for initial disability claims (Budgeted Workload Measure)

Fiscal Year	2010	2011	2012	2013	2014	2015	2016	2017
Performance	111 days	109 days	102 days	107 days	110 days	114 days		
Target	132 days	118 days	111 days	109 days	109 days	109 days	113 days	113 days
Target Met	Met	Met	Met	Met	Not Met	Not Met		

**Results:** We did not meet our target for FY 2015.

**Data Definition:** The number of Social Security and SSI initial disability claims that state DDS offices and other agency components complete in the current fiscal year up to the budgeted number.

**Data Source:** Management Information Central

### 3.1j: Average processing time for reconsiderations (Budgeted Workload Measure)<sup>3</sup>

Fiscal Year	2014	2015	2016	2017
Performance	108 days	113 days		
Target				109 days
Target Met				

**Data Definition:** We count the average number of days it takes to process a reconsideration disability claim from the date a reconsideration claim is filed in a field office to the time the state DDS office makes a determination.

**Data Source:** Social Security Unified Management System Appeals/Management Information Central

### 3.1k: Average processing time for hearing decisions (Budgeted Workload Measure)

Fiscal Year	2010	2011	2012	2013	2014	2015	2016	2017
Performance	426 days	360 days	353 days	396 days (September only)	422 days	480 days		
Target	485 days	373 days	321 days	389 days (September only)	415 days	470 days	540 days	555 days
Target Met	Met	Met	Not Met	Not Met	Not Met	Not Met		

**Results:** We did not meet our FY 2015 target.

**Data Definition:** The average processing time is the cumulative processing time for all hearing requests processed divided by the total number of hearing requests processed in the fiscal year.

**Data Source:** Case Processing Management System

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<sup>3</sup> We developed management information for Average Processing Time for Disability Reconsiderations in FY 2013. FY 2014 was the first full fiscal year for which data was available for this measure. Now that we have had the opportunity to analyze at least two years of actual data, this year we developed a performance target for FY 2017.

### 3.1l: Achieve the budgeted goal for disability determination service case production per workyear (Budgeted Workload Measure)

Fiscal Year	2010	2011	2012	2013	2014	2015	2016	2017
Performance	273	287	324	322	311	307		
Target	268	275	322	320	319	313		
Target Met	Met	Met	Met	Met	Not Met	Not Met		

**Results:** We did not meet our FY 2015 target.

**Data Definition:** The average number of all state DDS cases produced per workyear expended. A workyear represents both direct and indirect time, including overhead (time spent on training, travel, leave, holidays, etc.). It includes the time of staff on the DDS payroll, including doctors under contract to the DDS. The DDS case production per workyear is a national target.

**Data Source:** National DDS System and Disability Operational Data Store

### 3.1m: Achieve the budgeted goal for hearing case production per workyear (Budgeted Workload Measure)

Fiscal Year	2010	2011	2012	2013	2014	2015	2016	2017
Performance	105	109	111	109	102	95		
Target	108	107	114	111	106	104		
Target Met	Not Met	Met	Not Met	Not Met	Not Met	Not Met		

**Results:** We did not meet our FY 2015 target.

**Data Definition:** The average number of hearings completed per direct workyear used. A direct workyear represents actual time spent processing cases. It does not include time spent on training, ALJ travel, leave, holidays, etc.

**Data Source:** Office of Disability Adjudication and Review's Monthly Activity Report, Case Processing and Management System, Payroll Analysis Recap Report, Travel Formula, and Training Reports (Regional reports on new staff training, ongoing training, and special training).

## Strategic Objective 3.2: Maximize Efficiencies throughout the Disability Program

### Vision 2025 Priority: Innovative Organization

We remain committed to meeting the public's needs by using technology and tools that are cost effective for the taxpayer and convenient for our customers. We have a history of finding smarter, more cost-effective ways of doing business. With workloads still at high levels, we continue to explore new technologies and business processes to help cut costs, operate more efficiently, and provide the service that our customers expect and deserve.

### Strategies

- Enhance our ability to share workloads among our offices to maximize resources;
- Increase process automation; and
- Expand the use of health information technology (IT).

### Progress Update

We took the following steps in FY 2015 to maximize efficiencies throughout the disability program (see Key Initiatives and Performance Measures for more details):

- Implemented Agile practices in developing the consolidated Disability Case Processing System;
- Implemented the national skills-based routing system to increase field office telephone answering capability;
- Implemented data analytics and predictive modeling to identify disability applicants with severe medical conditions; and
- Expanded our health IT partnerships.

### Next Steps

- Continue developing a Disability Case Processing System capable of processing all case types by the end of FY 2016 (additional enhancements planned for FY 2017);
- Continue our participation in national and federal health IT policy and standards workgroups, ensuring our requirements are included; and
- Continue expanding the use of health IT for disability claims processing to increase the amount of medical evidence received and the number of states with participating providers.

### Risks and External Factors

The following risks or external factors may affect our efforts to maximize efficiencies throughout the disability program:

- Medical community's response time to our request for records – not all providers have the same electronic capabilities, so we must continue to provide a full range of response options, including traditional methods of obtaining medical records;
- The industry does not have electronic health record policies and standards that provides the specific health information we need for disability determinations; and
- Developing DCPS has been more complex and challenging than initially anticipated.

### Key Initiatives

#### Developing the Disability Case Processing System

In an ongoing effort to improve our effectiveness and efficiency in making timely, accurate disability decisions, we are modernizing our disability case processing system technology. The Disability Case Processing System will replace 54 independent legacy systems currently used throughout the disability determination services (DDS) offices nationwide.

The Disability Case Processing System will yield substantial benefits to the government and citizens by providing:

- Faster and more accurate case processing;
- Improved service to citizens;
- Reduced administrative costs; and
- Structured data that will support our fraud analytics efforts.

Developing the new system has been more complex and challenging than initially anticipated. Based on feedback from users, increasing program cost estimates, and extended timelines, we conducted a review of the project in early 2014. We implemented corrective actions later that year, including appointing a single accountable executive, restructuring the organization, and increasing user engagement.

In FY 2015, we focused our efforts on planning and analysis activities and implemented an Agile development approach. The Agile methodology uses shorter development cycles with frequent checkpoints. These shorter cycles help us identify issues earlier and enable us to be more responsive to changing user needs and priorities. We plan to develop and deploy the core product in FY 2016, adding additional functionality to process all types of disability cases throughout FY 2016 and 2017.

### Using Health Information Technology to Expedite Disability Decisions

Obtaining medical records electronically from health care organizations increases efficiencies in our disability determination process and dramatically improves service to the public by:

- Reducing the time to obtain medical records;
- Decreasing the time to complete a disability claim;
- Helping offset increasing workloads and staffing constraints; and
- Enabling computerized decision support.

We request more than 15 million medical records from about 500,000 providers for approximately 3 million initial disability claims annually. Our primary goal is to increase the volume of medical evidence received via health IT by expanding existing partnerships and adding new partners.

In FY 2015, we expanded our health IT partnerships from 3,143 to more than 7,000 providers and increased the number of organizations from 28 to 48. We also increased the number of states, plus the District of Columbia, with participating health IT providers from 29 to 33. We increased the percentage of initial disability claims with health IT medical evidence to 6.1 percent, exceeding our performance goal of 6 percent.



## Performance Measure – Strategic Objective 3.2

### 3.2a: Improve the disability determination process by increasing the percentage of initial disability claims using electronically transmitted health records and medical evidence (Health IT)

Fiscal Year	2014	2015	2016	2017
Performance	3% (84,779 initial claims)	6.1% (167,626 initial claims)		
Target	2.5% of initial disability claims processed with health IT medical evidence (75,000 initial claims)	6% of processed initial disability claims with health IT medical evidence (164,820 initial claims)	8% of processed initial disability claims with electronically transmitted health records and medical evidence (Health IT) (222,000 initial claims)	11% of processed initial disability claims with electronically transmitted health records and medical evidence (Health IT) (308,000 initial claims)
Target Met	Met	Met		

**Results:** We met our FY 2015 target.

**Data Definition:** Percent of initial disability claims processed with health IT medical evidence.

**Data Source:** Health IT Management Information Database for number of initial level health IT cases, Performance Management Reports for number of initial level disability cases

## Strategic Objective 3.3: Enhance Employment Support Programs and Create New Opportunities for Returning Beneficiaries to Work

### *Vision 2025 Priority: Innovative Organization*

To increase the numbers of beneficiaries returning to work, we must create clear, consistent employment incentives. The complexity of our rules and the fear of incurring an overpayment (because of earnings) discourage beneficiaries' attempts to work. We continue to:

- Look for ways to simplify work incentives and minimize improper payments due to earnings;
- Strengthen our employment support programs, including the Ticket to Work program; and
- Provide help for beneficiaries who want to work through the Work Incentive Planning and Assistance program.

To encourage beneficiaries' work efforts and prevent potential work-related overpayments, we updated our Supplemental Security Income (SSI) work incentive notices in 2013 to provide more information on our work incentive policies and clearly explain beneficiaries' reporting responsibilities. We encourage young people who receive SSI benefits to work and reduce their dependency on disability benefits. Recent agency-funded research has found that policy changes and improved services to young adults who receive SSI can sharply improve employment outcomes.

We focus our employment support efforts on ensuring that people who use those supports not only work, but also work at their maximum capacity, reaching self-sufficient earnings whenever possible.

We are working with other federal agencies to develop early intervention demonstration proposals that would provide resources and support to workers with disabilities to help them stay in the labor force as long as possible.

### Strategies

- Partner with the Departments of Education, Labor, and Health and Human Services to implement Promoting Readiness of Minors on SSI (PROMISE);
- Simplify work incentive policies and improve programs such as Ticket to Work and Vocational Rehabilitation Cost Reimbursement program; and
- Develop return-to-work demonstration proposals.

### Progress Update

We took the following steps in FY 2015 to enhance employment support programs and create new opportunities for returning beneficiaries to work (see Key Initiatives and Performance Measures for more details):

- Initiated the national evaluation of the PROMISE project;
- Promoted the use of Ticket to Work program to disabled beneficiaries:
  - Enhanced marketing campaign;
  - Resumed targeted ticket mailings in April 2015; and
  - Designed virtual job fairs to connect beneficiaries with federal contractors.
- Held a technical panel to develop a process to identify individuals with mental illnesses who are at risk of becoming beneficiaries; and
- Implemented new real-time online services to employment support service providers to assist them in providing better service to beneficiaries returning to work.

### Next Steps

- Continue evaluating and overseeing work incentive programs:
  - PROMISE project; and
  - Ticket to Work.



## Risks and External Factors

The following risk or external factor may affect our efforts to enhance employment support programs and create new opportunities for returning beneficiaries to work:

- Failure to achieve the work incentive programs' target numbers.

## Key Initiatives

### Improving Employment Support Programs

Many disabled beneficiaries want to work and, with adequate support, some beneficiaries attain self-sufficiency. The Ticket to Work program and the Vocational Rehabilitation Cost Reimbursement program help beneficiaries transition to employment.

Employment networks coordinate and deliver employment services under the Ticket to Work program. In addition to helping beneficiaries find jobs, the employment network staff also helps beneficiaries stay employed, advance in their jobs, and remain off the disability rolls.

We monitor the business practices of employment networks to ensure they provide quality services. We continue to develop clear performance goals to ensure employment networks support beneficiaries in gaining and sustaining long-term employment, economic security, and financial independence. We survey beneficiaries who are working with employment networks annually and provide the satisfaction results on a website. Beneficiaries can use the survey results and other information on the website to evaluate and select an employment network that best meets their needs, interests, and employment goals.

In June 2015, we began to conduct comprehensive reviews of employment networks. We will use the results of these reviews to ensure the networks are providing quality service to beneficiaries.

We are expanding our Internet Ticket Operation Support System (iTOPSS) to centralize the systems support for various applications in our return to work programs. Our partners can use iTOPSS to assign Tickets, request payment, report on beneficiaries' progress, receive marketing files, and access reports about their programs. Many actions in iTOPSS are real time, enabling both our partners and our beneficiaries to have access to the most current information available.

We are improving our beneficiary outreach and education efforts by expanding our Ticket to Work call center, Internet information, and social media tools (e.g., YouTube, Facebook, and Twitter). All our work incentive seminar events are now available via webinars.

While there were 84,027 new Tickets assigned during FY 2014 (a 26 percent increase in new Ticket assignments over the prior year), the net number of Tickets assigned or in use dipped from 321,218 at the end of FY 2013 to 316,363 at the end of FY 2014. However, the number of beneficiaries using Tickets who were removed from the disability rolls because they successfully returned to work increased from 8,682 to 10,529.

In FY 2014, we reported how many participating beneficiaries earned at least at the trial work level (\$770 per month in FY 2014) within a year of starting the program. In FY 2015 and beyond, we will report the number of disability beneficiaries who use their Tickets and earn above trial work level, regardless of how quickly they did so. Our reporting will provide data on beneficiaries each year (not cumulative) and will tell us how many program participants have earnings at least at the trial work level or higher in the reporting year.



We joined with many other federal agencies to plan for and implement new regulations published by the Department of Labor in FY 2014. The regulation encourages businesses awarded federal contracts to hire people with disabilities. As part of that effort, we began using our outreach tools to link beneficiaries participating in our employment support programs with federal contractors seeking to hire people with disabilities.

In FY 2015, our marketing contractor developed plans to host virtual job fairs to connect beneficiaries participating in the Ticket to Work program with federal contractors seeking to hire people with disabilities. We will also work with other federal agencies to help keep more people with disabilities in the workforce and off disability benefits.

In FY 2016 and FY 2017, we will continue to improve our outreach and job matching activities, focusing on bringing more beneficiaries and potential beneficiaries into the federal contractor workforce. We will continue hosting virtual job fairs and expect to see an increase in the number of working Ticket participants. The history of the Ticket programs suggests that Ticket assignments lag behind the Ticket mailings by up to 18 months. Therefore, we expect a measurable increase in assignments in FY 2016 and FY 2017.

### **Improving Employment Support Outreach to Targeted Working-Age Beneficiaries**

Historically, we told our beneficiaries about our work incentive programs by mailing them a paper ticket and brochure when they began receiving benefits. We stopped the mailings in June 2011 and resumed them in April 2015. We expect these mailings will increase awareness of the program and result in an increase in participation in FY 2016 and FY 2017.

We also make automated telephone calls to beneficiaries we determine are the most likely to return to work. The calls tell individuals about their eligibility for the employment services and support available through the Ticket to Work program. In FY 2015, we expect to send tickets to 60,000 beneficiaries ages 18-56.



## Performance Measures – Strategic Objective 3.3

### 3.3a: Increase the number of beneficiaries returning to work by achieving the target number of Social Security Disability Insurance and Supplemental Security Income disability beneficiaries with Tickets assigned and in use, who work above a certain level

Fiscal Year	2015	2016	2017
Performance	Data available April 2016		
Target	50,000 beneficiaries	55,000 beneficiaries	60,000 beneficiaries
Target Met	TBD		

**Results:** Our data will not be available until April 2016. We will report our performance for FY 2015 in next year's report.

**Data Definition:** The total number of Social Security Disability Insurance, Supplemental Security Income, and concurrent beneficiaries who used their Ticket to sign up with an employment network or state vocational rehabilitation agency and who have recorded quarterly earnings in the Office of Child Support Enforcement database that are at or above three times the trial-work-level.

**Data Source:** Office of Child Support Enforcement earnings database

## Strategic Goal 4: Build a Model Workforce to Deliver Quality Service

Our employees are the cornerstone of our organization and are critical to fulfilling our public service mission. Their commitment, along with our partners in disability determination services (DDS) offices across the country, allows us to provide dedicated and compassionate services to the public. We provide consultation, products, and services that foster solutions to critical workforce issues.

It is critical we maintain a quality workforce by creating a work environment that supports excellent service. Especially with our economic challenges, our employees are our most vital and valued asset. Their training, developmental opportunities, and institutional knowledge-sharing are a high priority, and we continue to invest in these areas.

As our employees' expectations change, we continue to seek ways to be an employer of choice. We are expanding flexible workplace options, such as telework, and creating more opportunities for skills development.

### Strategic Objective 4.1: Attract and Acquire a Talented and Diverse Workforce that Reflects the Public We Serve

#### **Vision 2025 Priority: Exceptional Employees**

We have one of the most diverse workforces among agencies our size. We take great pride in knowing our employees reflect the diversity of the people we serve.

To remain an employer of choice for top talent, we are improving our hiring processes by using modernized recruitment strategies, such as social networking tools and virtual job fairs. We will retain this talent by updating our human resources programs, and equipping employees with the essential tools and support needed to complete their work and communicate with people of all ages, education levels, and cultural backgrounds.

#### Strategies

- Compete for top talent through modernized recruitment strategies;
- Use hiring flexibilities and programs to expand qualified applicant pools;
- Market and expand use of hiring authorities for veterans and individuals with disabilities; and
- Bridge knowledge gaps with core competencies for mission-critical positions.

#### Progress Update

We took the following steps in fiscal year (FY) 2015 to attract and acquire a talented and diverse workforce (see Key Initiatives and Performance Measures for more details):

- Implemented modernized recruitment strategies such as:
  - Social networking tools;
  - Virtual job fairs; and
  - Promoting workplace flexibilities like telework.
- Used the following Pathways Programs for recruitment:
  - The Internship program;
  - The Recent Graduates program; and
  - The Presidential Management Fellows program.
- Hired a recruitment manager to support agency recruitment efforts.

#### Next Steps

- Implement agency recruitment plan;
- Develop marketing strategies;
- Share employment opportunities with veteran service groups; and
- Share employment opportunities with vocational rehabilitation agencies, employment networks, and college and university service coordinators.

## Risks and External Factors

The following risk or external factors may affect our efforts to attract and acquire a talented and diverse workforce that reflects the public we serve:

- Competition with the private sector to attract and retain talented individuals; and
- Lack of knowledge about federal job opportunities.

## Key Initiatives

### Focusing on the Employment of Veterans and Individuals with Disabilities

We honor the courage and sacrifice the men and women in our armed forces made during their active service. We also respect the skills gained during their service. Offering veterans career opportunities provides us with experienced employees and allows us to honor their service.

We also recognize the rich talent pool that exists among individuals with disabilities. We benefit from their experience as we develop strategies to improve our service to the American people.

Each fiscal year we establish goals for recruiting veterans and individuals with disabilities. Despite recent hiring limitations and budget constraints, we achieved or exceeded our commitments to hiring veterans and disabled workers.

In FY 2015, veterans represented 39.32 percent of our total hiring. Disabled veterans represented 18.57 percent of our total hiring. In FY 2016 and FY 2017, our hiring goals are 25 percent for veterans and 17.50 percent for disabled veterans. We expect to meet or exceed those goals.



We also employ individuals with targeted disabilities at nearly twice the rate of the Federal Government as a whole. In FY 2015, employees with targeted disabilities represented 2.02 percent of our total workforce.

In FY 2015, to assist with hiring and retaining both veterans and individuals with disabilities, we:

- Developed resources to guide recruiters, hiring officials, and managers throughout the hiring process;
- Issued a reminder to all employees about the reasonable accommodation process and the benefits and protections of self-identifying as an employee with a disability;
- Collaborated with federal, state, and local veteran support networks to communicate employment and internship opportunities, including the:
  - **Non-Paid Work Experience program**, offered by the Department of Veterans Affairs (VA) for disabled veterans, and
  - **Operation War Fighter Internship program**, offered by the Department of Defense for injured service men and women who are still on active duty, but awaiting medical discharge.
- Continued to participate in the Vocational Rehabilitation Internship Program (VRIP), which provides unpaid work experience to clients of state vocational rehabilitation agencies;
- Enhanced our web tool used by staff nationwide to request reasonable accommodation for customers. Staff can now track the status of their requests;
- Hosted events during National Disability Employment Awareness Month highlighting contributions made by our employees with disabilities. Events were also held showcasing assistive technology and explaining the reasonable accommodation process;
- Participated in job fairs, meetings, and other events targeted to veterans and individuals with disabilities;
- Worked with the VA to establish a national approval for a GI Bill on-the-job training benefit for five front-line positions, including benefit authorizer, claims authorizer, claims representative, service representative, and teleservice representative.

By working with groups like the VA, the Wounded Warrior program, vocational rehabilitation agencies, college and university disability services offices, armed forces job fairs, disability advocacy organizations, and other employment

networks supporting veterans and individuals with disabilities, we aim to create awareness of our employment opportunities.

For FY 2016 and FY 2017, we plan to expand the existing initiatives and add more initiatives. We will focus on developing retention strategies to support our hiring efforts.

### Highlighting the Pathways Programs (for Students and Recent Graduates to Federal Careers)

Students and recent graduates infuse our workplaces with new enthusiasm, talents, and perspectives. Our Pathways programs offer opportunities through three specific programs:

- **The Internship program** provides students in high schools, colleges, trade schools, and other qualifying educational institutions with paid opportunities to explore federal careers while completing their educations;
- **The Recent Graduates program** provides developmental experiences to individuals who, within the previous two years, graduated from qualifying educational institutions; and
- **The Presidential Management Fellows program** provides entry-level positions and leadership development for advanced degree candidates and recent advanced degree graduates.



Hiring through these programs enables us to offer participants clear career paths, along with meaningful training and development opportunities. These programs enhance our ability to attract and hire a talented and diverse workforce that reflects the public we serve.

In FY 2015, we hired about 15 percent of our new employees through the Pathways programs. As our budget allows, we will continue participating in the Pathways program to attract new employees.

## Performance Measures – Strategic Objective 4.1

### 4.1a: Maintain the target veteran and disabled veteran new hire percentage to improve their representation in our workforce

Veterans Hiring

Fiscal Year	2010	2011	2012	2013	2014	2015	2016	2017
Performance	17.33%	26.72%	36.78%	46.60%	41.28%	39.32%		
Target			26.72%	18.00%	25.00%	25.00%		
Target Met			Met	Met	Met	Met		

Disabled Veterans Hiring

Fiscal Year	2010	2011	2012	2013	2014	2015	2016	2017
Performance	8.72%	13.59%	15.49%	18.10%	19.68%	18.57%		
Target			14.59%	15.00%	16.49%	17.50%		
Target Met			Met	Met	Met	Met		

**Results:** We have exceeded our target for both veteran and disabled veteran hiring over the past four years.

#### Data Definition:

**Veteran Hiring:** For a given fiscal year, the percentage of overall permanent hires who are veterans (e.g., an employee who has been discharged or released from active duty in the armed forces under honorable conditions, has a 5-point or 10-point Veterans' Preference, has creditable military service, has an annuitant indicator, or has an appointment under either the Veterans Recruitment Appointment, the Veterans Employment Opportunities Act of 1998, or the 30 percent or more disabled veteran hiring authorities).

**Disabled Veteran Hiring:** For a given fiscal year, the percentage of overall permanent hires who are disabled veterans (e.g., an employee who has been discharged or released from active duty in the armed forces under honorable conditions and has a 10-point preference due to a service-connected disability). This category is a subset of the overall veterans hiring statistic.

Data includes full-time permanent and part-time permanent employees only.

**Data Source:** Federal Personnel and Payroll System Datamart

#### 4.1b: Strengthen workforce diversity by maintaining the representation of employees with targeted disabilities

Fiscal Year	2010	2011	2012	2013	2014	2015	2016	2017
Performance	1.9%	1.9%	1.9%	1.9%	2.0%	2.0%		
Target			2%	2%	2%	2%	2%	2%
Target Met			Not Met	Not Met	Met	Met		

**Results:** We met our FY 2015 target.

**Data Definition:** The percentage of the on-duty workforce, as of the end of the fiscal year (September 30), who self-identified as an individual with a targeted disability (e.g., an employee who has self-identified with one or more of the following physical or mental impairments: deafness, blindness, missing extremities, partial paralysis, complete paralysis, epilepsy, severe intellectual disability, psychiatric disability, or dwarfism).

Data includes full-time permanent and part-time permanent employees only.

**Data Source:** Federal Personnel and Payroll System Datamart



## Strategic Objective 4.2: Strengthen the Competency, Agility, and Performance of Our Workforce to Align with the Needs of the Public

### Vision 2025 Priority: Exceptional Employees

No matter how much automation we use to help us work more efficiently, we must equip our employees with the information and tools they need to perform every task well. Providing our employees with ongoing training ensures our employees can deliver outstanding service and meet our customers' needs.

### Strategies

- Ensure effective use of the agency's performance management systems to manage employee performance;
- Expand supervisor proficiencies;
- Prepare employees for future leadership opportunities;
- Develop methods to share subject matter expertise;
- Reduce skills gaps in mission-critical positions; and
- Provide employees with continued access to training and developmental experiences.

### Progress Update

We took the following steps in FY 2015 to strengthen the competency, agility and performance of our workforce (see Key Initiatives and Performance Measures for more details):

- Enhanced employee-management communications:
  - Acknowledged employee work contributions through monetary and honor award recognitions;
  - Expanded program efforts for knowledge management, managerial, and leadership development; and
  - Implemented Skills Connect pilot as part of our GovConnect initiative.
- Launched National Mentoring Program pilot;
- Implemented supervisor proficiencies plans and leadership initiatives:
  - Established internal leadership development programs; and
  - Rolled out Leadership Essentials for New Supervisors.
- Procured an updated Learning Management System with competency modeling capability;
- Worked with Office of Personnel Management to develop a framework for competency/skills development and assessment;
- Implemented Equal Employment Opportunity (EEO) One Stop, a comprehensive online library of up-to-date, legally compliant, uniform information about EEO laws, policies, and procedures, for employees, managers, and EEO practitioners nationwide; and
- Launched wEEO Radio, an innovative mechanism to disseminate EEO training to managers nationwide via bi-monthly "radio broadcasts" (teleconferences) in a talk show format.

### Next Steps

- Evaluate Skills Connect pilot and prepare for agency-wide launch;
- Assess merit-based execution of the Performance Culture gauged by evaluation of performance and award actions;
- Continue to enhance Performance Assessment and Communications System training; and
- Develop continuous learning programs for experienced supervisors and managers that will include an assessment and job coaching.

## Risks and External Factors

The following risks or external factors may affect our efforts to strengthen the competency, agility, and performance of our workforce to align with the needs of the public:

- Inability to replace employees at or near the attrition rate in previous years has resulted in ongoing skills gaps;
- Limited training and developmental opportunities for interested employees; and
- Insufficient training and support provided to current management and leaders.

## Key Initiatives

### Creating Management Training

We are building a cadre of leaders whose skills are transferable throughout our organization. Our Leadership Essentials for New Supervisors training integrates technical skills with leadership competencies, while emphasizing performance management.

In FY 2015, we assigned new supervisors to the LENS training. Following training, we conducted competency gap assessments to target future training.

In FY 2016, we will revise the curriculum based on participant feedback. Participants also have access to online resources, including a management discussion forum. We expect the forum will improve communication and knowledge sharing. Further enhancements planned for FY 2017 include automatically enrolling new supervisors within a month of their promotions.

### Reducing Skills Gaps

Identifying and reducing skill gaps at all levels of the organization is important for our success.

In FY 2015, we began developing competency assessments for two mission critical occupations in our operations area: the 105 Series Social Insurance Specialists and the 962 Series Contact Representatives. Additionally, we worked to reduce skills gaps in three other positions throughout the organization:

- Human Resources Specialists throughout the nation;
- Legal Assistants in our Office of Disability Adjudication and Review; and
- Social Insurance Specialists in our Office of Retirement and Disability Policy.

In FY 2016 and FY 2017, we will reassess the new models, conduct gap reduction activities, and continue to develop new models for other mission critical occupations.

Our efforts also align with the Cross-Agency Priority goal “Create a Culture of Excellence and Engagement to Enable Higher Performance”. More information on Cross-Agency Priority goals is available on [performance.gov](http://performance.gov).

### Focusing on Career Development Programs

Our future depends on developing employees’ leadership and management skills throughout their careers. One way we identify and develop potential leaders, helping ensure we have a strong succession management pipeline, is through our National Career Development Programs:

- **The Leadership Development Program** prepares employees for General Schedule (GS)-11 through GS-13 leadership positions. We will announce and select employees for this program in FY 2016; and
- **The Advanced Leadership Development Program** prepares employees for GS-14 and GS-15 leadership positions. The 2014 class will end in FY 2017.

These programs target employees with proven leadership potential. We strengthen their leadership skills through developmental assignments and formal training.

To help our experienced managers prepare for senior-level positions, we offer the Senior Executive Service Candidate Development Program. This program is a key element of our succession management strategy for filling future executive-level leadership vacancies.

In addition to our formal leadership programs, many of our employees gain leadership skills through progressively higher positions requiring greater levels of responsibility, accountability, and employee interactions.

### **Using SkillsConnect to Share Talent Across Our Agency**

The Office of Personnel Management recently partnered with federal agencies to implement GovConnect. GovConnect is a federal initiative designed to create a culture of excellence based on collaboration and teamwork within and across agencies.

SkillsConnect is our GovConnect pilot. SkillsConnect enables employees to use their existing skills, establish networks, and gain exposure to opportunities outside their own work areas. Participating employees remain in their current positions, and may work on a project for up to 20 percent of their workday for up to six months, depending on the project.

Our SkillsConnect pilot began in January 2015. One-third of our agency, approximately 21,000 employees, participated in the pilot. Based on our evaluations, which we started at the end of July 2015, we will work with stakeholders and make updates needed before launching the initiative agency-wide in FY 2016.

### **Enhancing our Human Resources Services Portal**

Our Human Resources (HR) business processes rely on several standalone applications, most requiring separate security access. Our enhanced portal provides one-stop shopping for our managers, employees, and specialists to access HR information and applications. Access is role-based, and where possible, we have implemented single sign on.

In FY 2015, we added links to existing services and information. We are also building a nationally available version of a regional application that interfaces with the federal personnel and payroll system data.

We expect to release an electronic version of SSA-7B Employee Record, by the end of the FY 2016. This application will allow managers and supervisors to view information displays with interactive functionality for their employees. We are planning additional releases in FY 2017.

### **Marketing Availability of On-Demand Training and Development**

We continue to promote our electronic libraries, online and distance training, and just-in-time training for employees. Our comprehensive online library delivers agency-specific content and training on new skills. It provides over 3,500 interactive courses, 49,000 eBooks, 4,800 leadership videos, 13,940 information technology desktop application videos, and 480 audio books. Most of the training sessions are less than an hour long, and employees can choose the format and training pace that accommodates their job, work location, and personal commitments.

In FY 2015, we used infomercials to advertise, educate, and inform employees of our available human resource services, programs, and soft skills training offerings.

### **Supporting Employees through Mentoring**

Mentoring is a dynamic developmental and learning partnership through which one person (mentor) shares knowledge, skills, information, experience, perspective, and wisdom to foster the personal and professional development of another (mentee) through ongoing communication.

To support our employees and help prepare them for future job requirements, we piloted our National Mentoring Program, which is open to all employees. Mentoring programs increase morale and organizational productivity and help participants plan their career paths.

The primary goal of the National Mentoring Program is to foster relationships that enhance personal and professional growth and development. Through the mentoring relationship, mentors have the opportunity to coach, guide, and share experiences, knowledge, and skills, which will help to foster an inclusive culture that leads to greater retention of well-experienced and empowered employees.

Our goals for the mentoring program are to:

- **Promote a “Knowledge-sharing Culture” to Support Succession Planning Efforts** - Mentoring facilitates knowledge sharing, while developing top talent and a pipeline of well-qualified candidates;
- **Facilitate Skill and Competency Development to Support Employee Talent Development** - Mentoring facilitates self-improvement, serving as a conduit for employee development, career planning, and sustaining optimum skills, competencies, and performance; and
- **Increase Employee Engagement to Improve Employee Morale and Retention** - Mentoring helps foster an inclusive culture and can lead to a greater retention of well-qualified and empowered employees.

## Performance Measures – Strategic Objective 4.2

### 4.2a: Strengthen workforce competence by improving our talent management index score

Fiscal Year	2010	2011	2012	2013	2014	2015	2016	2017
Performance	61%	62%	59%	55%	57%	59%		
Target						Increase the talent management index score to 60%	Increase the talent management index score to 61%	Increase the talent management index score to 63%
Target Met						Not Met		

**Results:** We did not meet our FY 2015 target; however, our talent management score increased from 57 percent in FY 2014 to 59 percent in FY 2015.

**Data Definition:** During a given year, the Office of Personnel Management uses data from seven Federal Employee Viewpoint Survey questions to determine the extent to which employees perceived the organization has the talent necessary to achieve organizational goals. The seven survey questions follow:

Question 1 - I am given a real opportunity to improve my skills in my organization.

Question 11 - My talents are used well in the workplace.

Question 18 - My training needs are assessed.

Question 21 - My work unit is able to recruit people with the right skills.

Question 29 - The workforce has the job-relevant knowledge and skills necessary to accomplish organizational goals.

Question 47 - Supervisors/team leaders in my work unit support employee development.

Question 68 - How satisfied are you with the training you receive for your present job?

**Data Source:** Office of Personnel Management – Federal Employee Viewpoint Survey

## Strategic Objective 4.3: Foster an Inclusive Culture that Promotes Employee Well-Being, Innovation, and Engagement

### Vision 2025 Priority: Exceptional Employees

We have consistently ranked among the Top 10 Best Places to Work among large agencies in the Federal Government. Our employees believe strongly in our mission and in the work that they do for the American people.

We care about the well-being of our workforce and support their engagement at work. We know that the more effort we place on employee safety, collaboration between management and labor representatives, and agency-wide communication, the better the opportunities we will have to generate creativity and innovation.

### Strategies

- Promote work-life balance and employee well-being through workplace flexibilities;
- Ensure access to employee services (e.g., financial literacy, career development, work-life resources) regardless of location;
- Provide employees and managers with support to navigate complex personnel matters (e.g., employee conduct, performance, reasonable accommodations);
- Promote safety of employees through ongoing safety training and emergency preparedness activities;
- Engage labor organizations to promote collaboration and transparency; and
- Develop practices that facilitate open communication and understanding in order to enhance employee engagement and appreciation of our diversity.

### Progress Update

We took the following steps in FY 2015 to foster an inclusive culture that promotes employee well-being, innovation, and engagement (see Key Initiatives and Performance Measures for more details):

- Expanded employee telework participation;
- Promoted work-life balance support offered to employees;
- Used Diversity and Inclusion Council to pilot the National Mentor Program;
- Established an Employee Engagement Community of Practice;
- Switched to new digital emergency radio system;
- Surveyed employees to find out their experiences with diversity and inclusion;
- Established a program to identify and overcome barriers hindering our diversity and inclusion efforts; and
- Collaborated with our three labor unions on workplace issues and held reoccurring forums.

### Next Steps

- Identify and market potential career paths for employees;
- Expand the number of eligible employees participating in telework;
- Research and develop plan for reducing realty costs through initiatives like hoteling and shared workplaces;
- Continue labor management and employee relations forums; and
- Establish a web-based platform and electronic message board for employees to collaborate on work topics and engage in idea sharing.

### Risks and External Factors

The following risks or external factors may affect our efforts to foster an inclusive culture that promotes employee well-being, innovation, and engagement:

- Some employees are unaware of work-life support options or unable to take advantage of them;
- Lack of computers available to support telework expansion;
- Varying expectations and needs of a multigenerational workforce;
- Low employee morale; and
- Reaching labor agreements.

## Key Initiatives

### Improving the Employee Satisfaction

Our employees are essential to meeting our challenges and achieving agency goals. Therefore, it is important that we foster an environment that embraces employee engagement. Employee satisfaction is a priority for our agency. The Office of Personnel Management's (OPM) Federal Employee Viewpoint Survey (FEVS) results allows us to gauge employee satisfaction in various categories, such as work environment, workloads, employee development, employee programs, and leadership.

In response our FEVS results, we conduct a comprehensive analysis and, as a result, developed the Improving Employee Satisfaction Plan. The Plan summarizes the FEVS results and identifies our strengths, areas for improvement, and includes action steps. We update the Plan annually, after we receive our FEVS results.

We develop our action steps using the following information:

- Comprehensive analyses of the survey results to identify strengths, trends, and areas for improvement;
- Action-planning guidance from OPM, the Partnership for Public Service, and the Corporate Executive Board;
- Extensive review of current research, benchmarking studies, and best practices; and
- Input collected from our components, labor unions, advisory councils, management associations, the Human Capital Executive Steering Committee, and previous Improving Employee Satisfaction-related workgroups.



Our 2015 FEVS results showed that we have talented, dedicated, and hardworking employees who understand how their work relates to our mission. The results also identified employee development, work-life balance, effective leadership, and communication as areas that need our attention.

Our Plan serves as a roadmap for agency-wide change and improvement in employee engagement and satisfaction.

### Creating Management and Labor Forum Meetings and Predecisional Involvement Opportunities

We are committed to fostering a collaborative labor-management relationship with our three unions (American Federation of Government Employees, International Federation of Professional and Technical Engineers, and National Treasury Employees Union) through discussions during forums. Working with our unions before we make decisions on workplace issues is crucial for strengthening the labor-management relationship. The input and support of employees and management are critical to meeting our long-term public service commitment. We will continue to work collaboratively with employee representatives to ensure we deliver the highest quality service to the American people.

In FY 2015, we:

- Coordinated joint labor-management events, developed forum improvement objectives, and are working on areas of improvement reflected by the Federal Employee Viewpoint Survey (FEVS) Results;
- Developed an Executive Steering Committee consisting of union and management co-chairs, under the direction of Federal Mediation and Conciliation Service. There is also a relationship by objective committee, which meets monthly to discuss National forum improvements, plan agendas, and brainstorm ideas for improving relationships at all levels in the Agency;
- Met quarterly at the regional level to discuss specific issues affecting the region. In addition, Office of Disability Adjudication and Review forums met bimonthly;
- Established labor-management workgroups to address complex issues, plan joint labor-management relationship training and develop actions plans to improve work processes and communication; and
- Met with labor and management forum members to get pre-decisional input on our Skills Connect pilot, Job Experience Learning Program, and National Mentoring Program. We entered into an agreement on

SkillsConnect, and we entered into a memorandum of understanding on the job experience program and on the mentoring program.

In FY 2016 and FY 2017, we will continue using labor-management committees, workgroups, and forums to foster collaborative labor-management relationship with our unions. We plan to build additional relationships across regions and increase our pre-decisional involvement sessions.

### Highlighting Diversity and Inclusion

We serve a diverse nation and strive to recruit, promote, and retain a workforce that draws from all segments of society. We have a long-standing history of being among the most diverse federal agencies – a goal we achieved through careful planning and recruitment efforts.

Our *Diversity and Inclusion Strategic Plan*, developed in FY 2012, highlights proven best practices for attracting, hiring, and retaining a diverse workforce. The plan also describes how we can foster a work environment that draws on our collective talents, respects individual differences, and leverages diversity.

To sustain our commitment, we instituted a Diversity and Inclusion Council with representation from all levels of the agency, including senior leadership, labor, management associations, and Advisory Councils. The Council's ongoing mission is to provide overarching guidance and support for our diversity and inclusion efforts by recognizing employees' unique perspectives and contributions.

Our human resources staff collaborates with the Council on training, marketing, employee engagement, and outreach. Council members serve as role models and champions on initiatives that promote inclusiveness and leverage the diversity of our workforce.

Our diversity and inclusion practices help ensure we have a workforce that is representative of our customers and that we support Executive Order 13583, *Establishing a Coordinated Government-Wide Initiative to Promote Diversity and Inclusion in the Federal Workforce*.

We celebrate our individual differences and encourage full employee engagement by supporting these diverse Employee Advisory Councils within our workforce:

- American Indian and Alaska Native Advisory Council;
- Black Affairs Advisory Council;
- Hispanic Affairs Advisory Council;
- National Lesbian, Gay, Bisexual, and Transgender Advisory Council;
- National Women's Advisory Council;
- Pacific Asian American Advisory Council; and
- Veterans and Military Affairs Advisory Council.

Our Advisory Councils work with our Diversity and Inclusion staff and our executive leadership through the Diversity and Inclusion Council to help create an inclusive environment for our employees and provide excellent customer service to the diverse public we serve. The Advisory Councils provide ideas on improving services and promoting our programs in their respective communities.

Each year, we hold up to 12 commemorative programs or exhibits, recognizing groups that are under-represented in the Federal Government. In FY 2015, we held the first Unity Celebration, honoring workforce diversity beyond the under-represented groups and featuring exhibits highlighting our employees' varied nationalities.



## Supporting Work-Life Balance

Our Work-Life programs help our employees balance the demands of the workplace and their personal lives.

Telework provides employees with more flexibility and lower commuting costs, while still meeting the agency's needs. In recruiting, we find telework is a sought-after option, helping make us an employer of choice.

We have also seen an upward trend in our FEVS results related to telework satisfaction. Additionally, telework helps us address workspace issues. We will continue to expand telework, as equipment and job functions allow.

We are actively making other efforts to increase our ranking to place within the Top 5 Best Places to Work in the Federal Government. We promote family friendly policies, work/life services, and employee seminars on personal topics like financial literacy, fitness, stress management, and career development. We have also increased career opportunities across components.

In FY 2014, the agency implemented a new telework policy allowing employees to work in alternate locations, other than their official work locations. In FY 2015 and FY 2016, we will continue to increase participation in the agency's telework program.

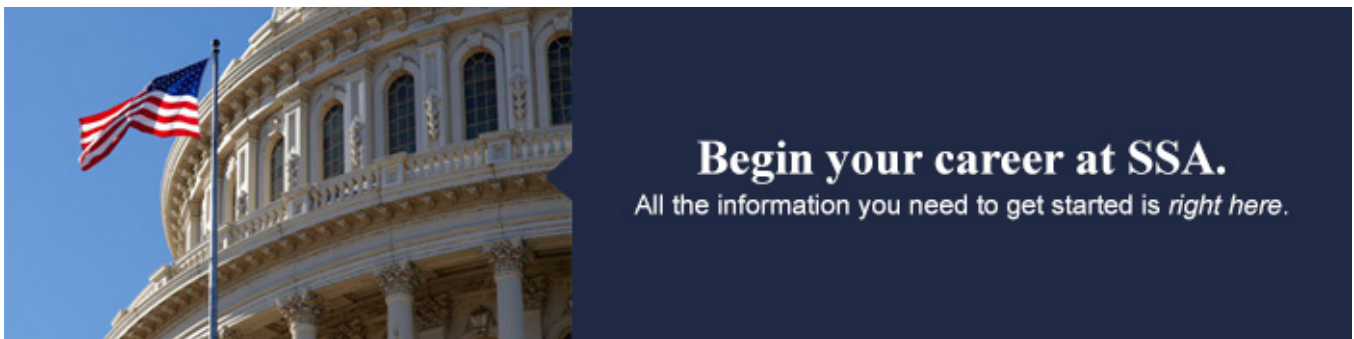
## Establishing an Employee Engagement Community of Practice

Developing and maintaining a strong partnership with our employees is essential to our success. Our new Employee Engagement Community of Practice helps strengthen our existing employee engagement and mission performance culture. The new Community of Practice will have representatives from each deputy commissioner-level office.

Our employee engagement score in the FEVS Engagement Index will be one of the measures we review to determine the Community of Practice's success.

To strengthen employee engagement, the Community of Practice group will focus on five key areas:

- **Discuss key FEVS/Improving Employee Satisfaction (IES) actions** from components and identify actions that could help other components;
- **Identify and share best practices** within components and work units with high engagement scores;
- **Identify areas needing attention** and help develop action steps;
- **Sustain successful approaches** by identifying supporting human capital policies and establishing strong outcome metrics; and
- **Monitor/update component IES plans** quarterly using HRStat, a quarterly, data-driven review of key performance metrics. Component-level IES plans will be tracked as part of the Community of Practice's work.



## Performance Measures – Strategic Objective 4.3

### 4.3a: Become one of the Top 5 Best Places to Work among large agencies in the Federal Government

Fiscal Year	2010	2011	2012	2013	2014	2015	2016	2017
Performance	Top 10 Ranking	Top 10 Ranking	Top 10 Ranking	Top 10 Ranking	Top 10 Ranking	Top 10 Ranking		
Target					Achieve a Top 10 Ranking	Achieve a Top 10 Ranking	Achieve a Top 5 Ranking	Achieve a Top 5 Ranking
Target Met					Met	Met		

**Results:** We met our FY 2015 target. Since 2007, our employees have ranked us in the top 10 [Best Places to Work in the Federal Government](#). In FY 2015, we ranked number 6 out of 19 large federal agencies.

**Data Definition:** During a given year, the Partnership for Public Service uses responses to three Federal Employee Viewpoint Survey questions to develop index scores. The Partnership for Public Service ranks Federal Government agencies based on the calculated index scores using a proprietary formula. The rankings provide a rating of employee satisfaction and commitment across government. The three Federal Employee Viewpoint Survey questions follow:

Question 40 - I recommend my organization as a good place to work.

Question 69 - Considering everything, how satisfied are you with your job?

Question 71 - Considering everything, how satisfied are you with your organization?

**Data Source:** The Partnership for Public Service

#### 4.3b: Increase workplace flexibilities by expanding telework opportunities for employees

Fiscal Year	2014	2015	2016	2017
Performance	104% increase over FY 2013 levels (8,547 employees)	13,514 employees participating in telework		
Target	Increase the percentage of employees participating in telework by 100% over FY 2013 levels (8,200 employees)	Increase the number of employees participating in telework to 16,400 by the end of the fiscal year		
Target Met	Met	Not Met		

**Results:** In FY 2015, 13,514 employees participated in telework.

**Data Definition:** The agency is increasing the number of employees nationwide who telework (as reported to the Office of Personnel Management annually). We define telework as working arrangements in which employees work officially assigned duties at an alternative duty station.

**Data Source:** Office of Personnel Management, Annual Telework Data

#### 4.3c NEW: Increase employee engagement as measured by the employee engagement index score

Fiscal Year	2010	2011	2012	2013	2014	2015	2016	2017
Performance	70%	72%	69%	67%	66%	68%		
Target							69%	70%
Target Met								

**Results:** Our Employee Engagement Index score increased from 66% in FY 2014 to 68% in FY 2015.

**Data Definition:** During a given year, the Office of Personnel Management uses responses from 15 Federal Employee Viewpoint Survey questions to develop the Employee Engagement Index scores. The Office of Personnel Management calculates the index scores by first determining the percent positive for each question in the subfactor indices. Then the unrounded percent positive scores are averaged across the questions in the index to get the index score. This subfactor index score is then rounded for reporting purposes. To create the overall Employee Engagement Index score, the unrounded subfactor index scores are averaged. This overall index score is then rounded for reporting purposes. The rankings provide a rating of employee satisfaction and commitment across government. The subfactor indices and Federal Employee Viewpoint Survey questions follow:

Subfactor Index: Leaders Lead (five items)

Question 53 - In my organization, leaders generate high levels of motivation and commitment in the workforce.

Question 54 - My organization's leaders maintain high standards of honesty and integrity.

Question 56 - Managers communicate the goals and priorities of the organization.

Question 60 - Overall, how good a job do you feel is being done by the manager directly above your immediate supervisor/team leader?

Question 61 - I have a high level of respect for my organization's senior leaders.

Subfactor Index: Supervisors (five items)

Question 47 - Supervisors/team leaders in my work unit support employee development

Question 48 - My supervisor/team leader listens to what I have to say.

Question 49 - My supervisor/team-leader treats me with respect.

Question 51 - I have trust and confidence in my supervisor.

Question 52 - Overall, how good a job do you feel is being done by your immediate supervisor/team leader?

Subfactor Index: Intrinsic Work Experience (five items)

Question 3 - I feel encouraged to come up with new and better ways of doing things.

Question 4 - My work gives me a feeling of personal accomplishment.

Question 6 - I know what is expected of me on the job.

Question 11 - My talents are used well in the workplace.

Question 12 - I know how my work relates to the agency's goals and priorities.

**Data Source:** Office of Personnel Management – Federal Employee Viewpoint Survey

## Strategic Objective 4.4: Enhance Planning and Alignment of Human Resources to Address Current and Future Public Service Needs

### Vision 2025 Priority: Exceptional Employees

Large multilayered organizations often lack the agility to keep up with the frequent changes required to address public service needs. We will analyze our current workforce and develop strategies to meet our future organizational needs. Using workforce restructuring and reshaping programs, we will develop approaches to streamline and align our workforce. Our approaches will be supported by data analysis and forecasting to ensure we are prepared for the near term and for future service delivery needs.

### Strategies

- Use workforce restructuring and reshaping programs (e.g., Voluntary Early Retirement Authority) to adjust and align the workforce with agency needs;
- Use human resource management information and data analytics to conduct effective workforce planning and forecasting that assists leaders in making data-driven decisions;
- Conduct data-driven performance reviews to assess, monitor, and track alignment of human capital programs with service delivery needs; and
- Utilize effective management principles to optimize organizational structures and workforce composition as we automate processes and expand self-service.

### Progress Update

We took the following steps in FY 2015 to enhance planning and alignment of human resources to address current and future public service needs (see Key Initiatives and Performance Measures for more details):

- Drafted Retirement Wave report analysis to address workforce challenges;
- Restructured agency workforce;
- Held first integrated performance improvement officer/HRStat session;
- Approved analytics projects for the analytics hub pilot; and
- Released two video-on-demand training sessions on:
  - Performance management; and
  - The importance of communication for managers.

### Next Steps

- Continue transition to competency-based human capital management;
- Produce an annual workforce analysis performance report using HRStat;
- Integrate at least one process or program into HRStat Review process;
- Pilot at least one project for the analytics hub;
- Continue to hold quarterly HRStat data driven reviews;
- Conduct a comprehensive study of new hire population;
- Release third video installment on performance management for managers; and
- Use Federal Employee Viewpoint Survey for HR performance data analyses.

### Risks and External Factors

The following risks or external factors may affect our efforts to enhance planning and alignment of human resources to address current and future public service needs:

- Ability to recruit and retain subject matter expertise in data analytics;
- Insufficient human resources staff to align agency priorities with public needs; and
- Limited access to latest technology supporting data-driven performance.

## Key Initiatives

### Implementing HRStat Review Process

Our HRStat reviews provide the information we need to determine our strengths and weaknesses, monitor program implementation, and evaluate our performance of our human capital initiatives and metrics. HRStat also enables us to track interim results of our human capital planning.

As part of our HRStat approach, we conduct quarterly data-driven human capital reviews. Senior executives review each quarter's outcomes to monitor our human capital outcomes.

For our initial FY 2015 HRStat session, we reviewed metrics and developed goals. We expect to meet or exceed established targets in 75 percent of the measures.

We also integrated our Human Capital Operating Plan initiatives into our HRStat review process. During quarterly review sessions, we monitor progress and develop strategies to address challenges.

By FY 2016, we expect HRStat to be implemented as a core business process.

### Using Applicant Flow Data

We must attract, develop, and retain a world-class workforce that delivers results for the American people. We strive to provide a level playing field and the opportunity for employees to achieve their potential.

One tool we use to examine our recruitment efforts is Applicant Flow Data. Applicants using [USAJobs.gov](https://www.usajobs.gov) can provide demographic information, including sex, ethnicity, and race, and how they learned about the position. Applicant Flow Data refers to the analysis of this information to determine selection rates among different groups for particular jobs.

We use this information to:

- Examine the fairness and inclusiveness of recruiting efforts;
- Determine whether recruitment efforts are reaching all segments of the population, consistent with federal equal employment opportunity laws;
- Identify barriers to employment and best practices at each stage of the hiring process: application, qualification, referral, and selection; and
- Target resources to address strategic challenges.

Collecting demographic data, including Applicant Flow Data, is an integral part of the process we use to identify barriers (in compliance with the policy guidance provided in the Equal Employment Opportunity Commission's Management Directive 715).

In FY 2016 and FY 2017, we will continue to analyze the data by components, regions, major occupations, and grade levels. As we identify differences in selection rates among different groups in a particular component or region, we will work to address those challenges.

### Implementing the Human Capital Operating Plan

Human capital is a major concern for leaders across the government. Federal leadership faces the challenge of recruiting, retaining, and developing a talented workforce in a tight fiscal climate. In the face of increasingly complex and demanding realities, we must have employees with the right skills, in the right places, at the right times to achieve our mission.

The Human Capital Operating Plan represents our commitment to renew our focus on human capital and succession management. The plan aligns with, and supports, the goals of our [Agency Strategic Plan for Fiscal Years 2014 – 2018](#) and [Vision 2025](#). Our plan includes a mandate to build a model workforce to deliver quality service as one of our five strategic goals.

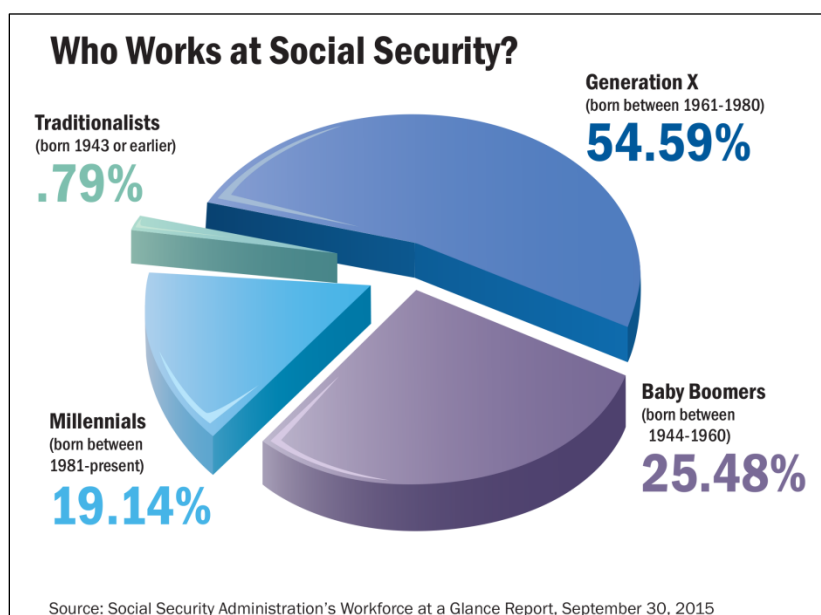
Our plan includes an analysis of our current and future workforce, identifies agency-specific initiatives, milestones, and outcome metrics, and focuses on the following key areas:

- Transform the agency into an employer of choice;
- Transition to competency-based human capital management;
- Expand leadership and core competency skill development; and
- Establish an integrated and collaborative human capital management framework.

Human capital management encompasses the process of managing how people are hired, developed, deployed, motivated, and retained. It builds upon the traditional model of HR by focusing on results. It also seeks to align HR decisions and investments more directly with our agency's mission, goals, and objectives.

We must adopt a more proactive and data-driven approach toward managing human capital to meet the needs of our future workforce. Further, we must commit adequate training resources to ensure staff remains fully prepared to provide quality service both now and in the future.

This initiative, coupled with the resources and governance structure to monitor success, provides a solid foundation for achieving a reimagined, revitalized effort toward the attraction, acquisition, development, engagement, and retention of our greatest asset – our employees.



### Analyzing Retirement Wave Analysis

We continue to face the challenge of a workforce that is decreasing while service demands increase. Our employees are essential to providing outstanding service to the public. Steady losses of employees from retirements present a unique opportunity to reshape our workforce. With just over 16 percent of our workforce eligible to retire, we will continue to build generational bridges and create an environment that focuses on developing a culture of continuous learning.

In FY 2015, we developed the FY 2015-2024 *Retirement Wave Report*. This report provides valuable workforce data that our decision-makers can use for human capital and financial management decisions. We analyzed and provided information on actual retirements, retirement eligibility, and retirement projections. This analysis gives an outlook on how our workforce may change over time. We will look for ways to prevent gaps and build the succession bench to guarantee continuity of the quality of service to the American public.

## Performance Measures – Strategic Objective 4.4

### 4.4a: Lay the foundation for building a 21st century workforce by meeting or exceeding targeted Human Resources measures

Fiscal Year	2014	2015	2016	2017
Performance	77%	83%		
Target	Achieve 75% of the human capital metrics	Achieve 75% of the human capital metrics	Achieve 78% of the human capital metrics	Achieve 80% of the human capital metrics
Target Met	Met	Met		

**Results:** We achieved 83% of the human capital metrics, exceeding our goal of 75%.

**Data Definition:** After the end of the fiscal year, we determine the number of initiatives that met or exceeded the established target. We divide the number of metrics where we achieved the selected targets by the total number of initiatives that we monitored throughout the fiscal year.

**Data Source:** Office of Personnel Management’s Federal Employee Viewpoint Survey, Federal Personnel and Payroll System, Human Resources Operational Data Store, Office of Personnel Management’s Applicant Satisfaction Survey, Office of Personnel Management’s Manager Satisfaction Survey.



## Strategic Goal 5: Ensure Reliable, Secure, and Efficient Information Technology Services

As the demand for our agency's services increases, the American public expects to interact with us using every technology available to them. Online and mobile service options are in high demand for those who prefer electronic channels, yet some people and some services still require in-person assistance at a field office.

A robust and cost-effective information technology (IT) environment is at the core of every service our agency provides for the American public and for our employees. We support our mission-critical business and service operations by designing, deploying, and maintaining one of the Nation's most sophisticated IT infrastructures.

With advances in technology, come increased security risks. Ensuring information and systems security is vital, and enhancing our cyber security protection is an ongoing task. When fully operational, our new data center, the National Support Center, will serve as the hub for our information technology operations. The National Support Center opened in September 2014, and we expect to complete the full systems migration by the end of 2016. We have planned carefully to ensure there is no service interruption during the transition.

### Strategic Objective 5.1: Maintain System Performance and the Continuity of Information Technology Services

#### **Vision 2025 Priority: Innovative Organization**

Technology is essential to everything we do. If our systems experience a problem, our productivity and service immediately decline. Maintaining strong IT performance is vital, despite rising IT demands, increasing cyber security risks, and constant industry changes.

We rely on a large and complex technology infrastructure. Our infrastructure includes dual data centers, extensive national databases, hundreds of software applications, large supporting computing platforms, and thousands of networked computers, printers, telephones, and other devices. Change to our IT infrastructure is constant, and we will ensure responsive, reliable performance.

Our two data centers, the National Computer Center and the Second Support Center, maintain beneficiary demographic, wage, and benefit information, enabling us to promptly and accurately make benefits payments. The National Computer Center has been in continuous operation since 1980.

As part of the *American Recovery and Reinvestment Act of 2009*, Congress approved funding to build a new data center. All current production data center operations now housed in our aging National Computer Center will transition to the new National Support Center in 2015 and 2016. The new center will provide increased capacity and improved operational reliability and efficiency.

#### Strategies

- Successfully transition to the new National Support Center; and
- Maintain responsive, reliable system performance.

#### Progress Update

The Social Security Administration, in consultation with the Office of Management and Budget, has determined that performance toward this objective is making **noteworthy progress**. We took the following steps in FY 2015 to maintain system performance and the continuity of information technology services (see Key Initiatives and Performance Measures for more details):

- Set up new IT infrastructure at the National Support Center, as scheduled; and
- Maintained system continuity, as planned.

## Next Steps

- Continue transition plan to the National Support Center; and
- Maintain current systems reliability metrics throughout the transition to the National Support Center.

## Risks and External Factors

The following risk or external factor may affect our efforts to maintain system performance and the continuity of information technology services:

- New legislation, changing technology, and high volumes of workloads may affect planned activities.

## Key Initiatives

### Enhancing Our Infrastructure

Our new National Support Center will dramatically increase our computing power, reduce our energy consumption, and provide the foundation for future infrastructure enhancements. We completed the IT infrastructure set up in April 2015, and by August 2016, all IT services should be completely migrated to the new center.

We designed the facility to be Leadership in Energy and Environmental Design Gold certified. Minimal staffing, lighting most areas only when staff are present, and managing the infrastructure remotely will help reduce energy costs. Innovative heating and cooling systems will also help reduce costs. For example, when outside temperatures are below 55 degrees (about 145 days each year), there will be practically no cooling costs.

Over the next several years, we will implement several technologies including high-speed disc replication, dynamic load balancing with high bandwidth connectivity between data centers, additional data center capacity, and automatic failover and staging systems.

### Maintaining Systems Performance While Transitioning to the National Support Center

Moving our data infrastructure is no simple task. The transition is a complex process and the nature of our business requires continuous operation. Our goal is to provide uninterrupted service during the transition from our National Computer Center in Baltimore to the new National Support Center in Western Maryland.

Our service migration began in October 2014 and will continue until August 2016. Our multiyear strategy includes using the latest technological advances to enhance the capacity, flexibility, and performance of our IT environment and infrastructure.

Our migration project recently received the 2015 Project Management Excellence Award from the Government Information Technology Council. A panel of government and industry representatives selected the winner, based on six criteria: significant mission outcomes, cost savings, risk management, customer experience, innovative approach, and quality assurance.

### Improving Information Technology Cost and Performance

We use proven technologies to lower IT cost and improve performance. As part of our capital planning and investment control process, we evaluate the cost of IT projects in terms of their return on investment.

We adopt new technologies to provide stable and high-performing environments, like:

- **Server consolidation:** Buying fewer, larger servers;
- **Server virtualization:** Dividing one large server into smaller sections which operate as individual servers, running their own operating systems and applications;
- **Data deduplication:** A specialized data compression process used to identify data chunks and reference them, instead of repeat them;
- **Hot aisle containment:** Installing a physical barrier to direct hot air exhaust to the air conditioning return system, increasing cooling efficiency;
- **High density computing:** Maximizing a computer's performance as much as possible in the smallest amount of space possible with as little heat as possible; and
- **Cloud computing:** Internet-based, instead of hard-drive based.

## Performance Measures – Strategic Objective 5.1

### 5.1a: Provide uninterrupted access to our systems during scheduled times of operation

Fiscal Year	2010	2011	2012	2013	2014	2015	2016	2017
<b>Performance</b>	99.84% availability	99.89% availability	99.9% availability	99.96% availability	99.97% availability	99.96% availability		
<b>Target</b>			99.5% availability	99.5% availability	99.5% availability	99.5% availability	99.5% availability	99.5% availability
<b>Target Met</b>			Met	Met	Met	Met		

**Results:** We have consistently exceeded this target since FY 2012. In FY 2015, we provided uninterrupted access to our systems 99.96 percent of the time during scheduled times of operation.

**Data Definition:** We define enterprise availability as a weighted total availability of service channel mission-critical applications for all our customers. We consider an application available when the end user can perform all business functions within the application with reasonable response times. The weighting takes into account the relative impact that an outage could have on our customers, considering both the functionality and the service hours that are potentially affected. Six different service channels (i.e., online, electronic disability process, Internet, telephone, data exchange, and weekend online services) and accompanying applications are included. Mission-critical services in our enterprise availability include:

- Self-service Internet benefits applications;
- Automated telephone menu data applications;
- Email and case processing systems used by our direct support staff or by our partnering disability determination services staff; and
- External business services, including application services between us and other federal agencies, as well as data exchange systems used by our governmental or business partners.

**Data Source:** Hewlett-Packard OpenView Service Center (data is limited to Critical Application Severity 1 outages)

## Strategic Objective 5.2: Enhance and Execute Plans to Modernize Our Systems

### Vision 2025 Priority: Innovative Organization

Our information technology (IT) solutions are constantly evolving as we meet our business needs with stable, modern technologies. We support and employ technologies championed by the Federal Chief Information Officer Council and the Federal Information Technology Reform Plan, such as:

- Digital government;
- Shared services;
- Modular development;
- Near 24/7 system availability; and
- Cloud (Internet-based) computing architecture.

We are revising our computer code, once dominated by older programming languages (e.g., Common Business Oriented Language and Assembler Language Code) to provide a better balance of more modern code while maintaining older, highly functioning code. Improving the presentation and usability of our older systems, while removing technical risks, continues to be our focus.

As funding permits, we invest in new business applications, while improving existing applications and infrastructure. We incrementally modernize our older software applications based on business opportunity and technical risk. We continue to enable newer, more adaptable technologies, when appropriate, while maintaining the code base and systems supporting the services we provide the American public every day.

### Strategies

- Refresh IT planning activities to effectively prioritize and manage IT investments;
- Employ technology to extend service, mitigate risk, and reduce cost; and
- Assess application portfolios, focusing on cost, business value, and technology sustainability.

### Progress Update

We took the following steps in FY 2015 to enhance and execute plans to modernize our systems (see Key Initiatives and Performance Measures for more details):

- Enhanced our annual application portfolio management review by combining data collection and detail analysis; and
- Implemented additional fraud detection algorithms to detect potential fraud.

### Next Steps

- Expand use of our application portfolio management process to applications developed outside the Office of Systems;
- Expand antifraud applications, identifying both internal and external threats; and
- Convert selected databases to relational database technology.

### Risks and External Factors

The following risks or external factors may affect our efforts to enhance and execute plans to modernize our systems:

- Modernization of some systems is delayed because they are currently stable and running smoothly;
- Subject matter experts who fully understand underlying business processes behind legacy systems are approaching retirement – thus we may lose institutional knowledge before those systems are migrated into new platforms; and
- Legislative changes and other federal mandates often require reallocation of scarce resources.

## Key Initiatives

### Modernizing Older Software Applications

We manage our IT application portfolio the same way individuals manage their investment portfolios. First, we evaluate existing software applications to ensure they meet our business goals while fitting into our overall IT plan. Then we use those evaluations to retire, modernize, or maintain the applications.

Our application portfolio management practice includes ongoing reviews of all our applications.

Modernization efforts include:

- Updating database designs by converting them to relational databases;
- Eliminating the use of Assembler Language Code;
- Replacing outdated user interfaces;
- Upgrading infrastructure; and
- Integrating our services more completely.

### Improving Information Technology Governance and Architectural Planning

IT governance and architectural planning covers a wide range of systems development and planning activities related to standards and regulations, systems management, life-cycle support, user groups, performance and availability, and new technologies. Governance helps ensure that we adhere to our policies and to federal IT requirements.

We provide IT governance and planning through our:

- Architecture Review Board;
- Infrastructure Review Board;
- Design Review Board;
- Enterprise data architects;
- Solutions architects;
- Security Architects; and
- Enterprise Architects.

These groups provide support for the design, installation, and maintenance of the hardware and software needed to ensure a reliable, efficient, and effective environment for all of our platforms.

### Enhancing the **my Social Security Portal**

We plan to redesign the **my Social Security** portal to enhance our customers' experience, provide greater protection for the public's data, and expand our secure online service options.

The redesign will provide critical enhancements to the **my Social Security** portal, allowing for new tabs for additional online services. The new tabs will group similar online services within the **my Social Security** portal, making the portal easier to navigate and enhancing our customers' experience.

The redesign will also add more robust anti-fraud and authentication capabilities to the **my Social Security** portal. The enhancements will provide users with a secure way to request replacement Social Security number cards online. As we expand our online service options, we are committed to providing secure online services both now and in the future.

Enhancing the **my Social Security** portal is vital to the success of our online services. We are adding responsive design so that our online services are available to our customers across a variety of devices (i.e. customer service stations, tablets, mobile devices, etc.). Enhancements will affect both current and future applications scheduled for release in FY 2016. Additionally, the redesign will plan for services coming behind the portal to ensure appropriate space is available.

In FY 2016 and FY 2017, the redesign project will include:

- Enhancing security for the online Social Security number replacement card functionality;
- Enhancing online fraud detection capabilities;
- Adding responsive design to the **my Social Security** portal; and
- Adding tabs within the portal to group services to improve the customer experience.

## Performance Measures – Strategic Objective 5.2

### 5.2a: Enhance systems performance and reliability by upgrading the telecommunications infrastructure in our offices

Fiscal Year	2014	2015	2016	2017
Performance	Upgraded infrastructure to better incorporate new technologies	Refreshed 100% of our network connection devices		
Target	Complete the infrastructure upgrade to incorporate modern technologies that support future Internet and network capacity needs and new capabilities	Refresh 50% of our network connection devices by September 30, 2015		
Target Met	Met	Met		

**Results:** We exceeded our goal by refreshing 100% of our network connection devices.

**Data Definition:** This target provides for the design, installation, implementation, monitoring, and maintenance of our Wide Area and Local Area Networks and the connectivity to these network services to end users nationwide. It also provides the communication medium through which our employees receive data such as voice and video, administers the Network's services agency-wide, and the exchange of data with other federal and state agencies. The projects in this initiative involve the National 800 Number, Satellite and Wireless Communications Solutions, Video Conferencing, fax, Voice over Internet Protocol, Electronic Messaging, and the procurements of system hardware and software services.

**Data Source:** Our Wide Area and Local Area Networks and Connectivity Plan

## 5.2b NEW: Improve customer service by using information technology to provide new online services to users of **my Social Security**

Fiscal Year	2015	2016	2017
Performance			
Target		Implement new fraud and authentication capabilities to enable customers to obtain replacement Social Security Cards securely through the <b>my Social Security</b> portal	Modernize the <b>my Social Security</b> portal framework to speed the integration of service offerings and to better group available functions together to focus on targeted user groups
Target Met			

**Data Definition:** This target improves access to our online services by providing citizens a way to request and obtain a Social Security replacement card through the **my Social Security** portal.

**Data Source:** Social Security Administration, Office of Systems

## Strategic Objective 5.3: Incorporate Innovative Advances in Service Delivery

### Vision 2025 Priority: Innovative Organization

Advances in computer technology, the increase of high-speed networks, and widespread use of mobile technology have reshaped our service channels. Our customers expect us to provide exceptional service, regardless of the technology they use.

We are constantly reviewing emerging technologies, and we are planning effective, efficient service delivery options based on our research. As we develop new options, we are targeting areas where reengineering is most needed.

We actively participate in the Federal Chief Information Officers Council and leverage the expertise of industry experts, as well as our own business and technical staffs, to develop the most effective solutions for our customers and our employees. Additionally, we are participating in the Federal Strategic Sourcing Initiative for Desktops and Laptops to support our infrastructure enhancement efforts.

### Strategies

- Deliver accurate, convenient, and flexible agency systems and services in a cost-conscious manner;
- Explore the use of emerging technologies to improve service and increase efficiency; and
- Engage and benchmark private and public IT communities to ensure the timely identification of important Key Initiatives.

### Progress Update

We took the following steps in fiscal year (FY) 2015 to incorporate innovative advances in service delivery (see Key Initiatives and Performance Measures for more details):

- Tested several new emerging technologies in our lab;
- Developed an agency-wide strategy for video service delivery; and
- Continued participation in the Federal Chief Information Officers Council.

### Next Steps

- Continue to support and maintain the testing lab with current devices based on trending internal and external usage patterns.

### Risks and External Factors

The following risks or external factors may affect our efforts to incorporate innovative advances in service delivery:

- The public demands more sophisticated, integrated service channels to supplement our traditional structure; and
- Implementing and maintaining customer service stations may not be cost effective.

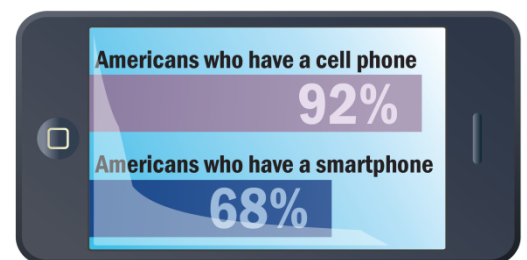
### Key Initiatives

#### Enhancing our National 800 Number Infrastructure

With our new National 800 Number infrastructure fully implemented, enhancements for FY 2014 focused on strategic planning and day-to-day management of our call centers to improve performance.

Those enhancements improved speech recognition, enabling callers to complete their business using our automated services.

In FY 2015, we implemented a set of standard indicators designed to help us gauge how our agents are performing. In addition, we developed tools to help managers work with agents to improve their customer interaction skills.



Source: Pew Research Center Internet Project Survey, October 2015.



By the end of FY 2016, under our new National 800 Number infrastructure, we plan to enhance customer service delivery with the use of post-call customer surveys, training, quality management, and performance monitoring.

Additionally, the enhancements will include speech analytics that will allow us to better manage customer expectations and help detect fraud.

#### **Expanding Video Conferencing Capabilities throughout the Agency**

We expanded video conferencing throughout the agency, including hearing offices, field offices, disability determination services offices, and individual employee workstations. We currently use desktop video units to provide video conferencing between sites and in rural areas where there is no local office. These units reduce travel time and costs while improving case production and allowing for more flexible scheduling. We continue to explore cost saving alternatives in equipment, service, and software.

## Performance Measures – Strategic Objective 5.3

### 5.3a: Enhance our IT infrastructure by implementing innovative systems accessibility and performance capabilities

Fiscal Year	2014	2015	2016	2017
<b>Performance</b>	Bandwidth-on-Demand capabilities are operational at over 75% of agency sites	Reduced our open systems infrastructure size to 1,000 servers		
<b>Target</b>	Implement Bandwidth-on-Demand, which will provide the ability to increase telecommunications capacity to quickly meet the changing service needs of our offices and clients	Reduce open systems infrastructure size from 1,500 servers to 1,000 servers by September 2015	Deploy new applications with a modern look and feel, accessible from the web or over mobile devices	Develop and implement our plan (strategy, policy, business model, and security requirements) for the establishment of an agency cloud service
<b>Target Met</b>	Met	Met		

**Results:** We are down to 1,000 open system servers as of September 2015.

**Data Definition:** This target provides for the design, installation, implementation, software, monitoring, and maintenance of our Wide Area and Local Area Networks and the connectivity to these network services to end-users nationwide. It also provides the communication medium through which our employees receive data such as voice and video, administers the network's services agency-wide, and the exchange of data with other federal and state agencies. The projects in this initiative involve the National 800# Call Center, Satellite and Wireless Communications Solutions, Video Teleconferencing, Fax, Voice over Internet Protocol, Electronic Messaging, and the procurements of system hardware and software services.

**Data Source:** Our Wide Area and Local Area Networks and Connectivity Plan

**5.3b: Explore the use of emerging technologies by establishing a testing lab to promote research and development of innovative technology solutions that provide more effective and flexible ways for the public to conduct business with us online and for our employees to complete their work**

Fiscal Year	2104	2015	2016	2017
Performance	We are actively supporting new agency electronic initiatives such as customer service stations and an upgraded environment for self-help personal computers	Conducted three new research projects		
Target	Identify and implement new innovative tools to expand the capabilities of the testing lab to develop solutions that accommodate evolving customer preferences.	Conduct three new research projects in emerging technologies such as predictive analytics, cloud, shared services, self-help personal computers, real-time chat, digital analytics, and cognitive computing by September 30, 2015		
Target Met	Met	Met		

**Results:** We met our FY 2015 target.

**Data Definition:** Because of today's volatile and unpredictable mobile, tablet, and personal computer environment, we must conduct compatibility testing with a multitude of devices, browsers and operating systems to ensure our online customers are able to conduct business successfully with us no matter what device they use. By monitoring the advances being made in delivery channels and by monitoring the use of these channels to access our services, we determine which devices to purchase and test in our testing lab, focusing on the devices with the highest percent of use.

**Data source:** Industry and national trends. Google Analytics

## Strategic Objective 5.4: Continuously Strengthen Our Cyber Security Program

### Vision 2025 Priority: Superior Customer Experience

Given the sensitive nature of the highly personal information and data within our systems, data integrity, security, and protecting individual privacy are critical to sustaining public trust in our services. New services and delivery channels expose us to modern threats. We must be vigilant and continue to strengthen our cyber security intelligence and protections.

We maintain a comprehensive, agency-wide information security program of controls that protect our information and communications assets. We continually review policies and processes, taking appropriate corrective action to prevent misuse and unauthorized access to assets and sensitive data, including personally identifiable information.

### Strategies

- Maintain information security preparedness;
- Continually adjust security processes and procedures to reflect changes in technology, the sensitivity of our data and systems, and awareness of actual and potential internal and external threats;
- Perform risk-based systems reviews to enhance continuous monitoring and data loss prevention strategies; and
- Enhance our audit trail, integrity review, and fraud prevention processes.

### Progress Update

We took the following steps in FY 2015 to strengthen our cyber security program (see Key Initiatives and Performance Measures for more details):

- Implemented several new processes and capabilities to strengthen our cybersecurity program, including:
  - Security awareness training campaign;
  - Continued implementation use of Personal Identity Verification credentials; and
  - Continuous dashboard monitoring.

### Next Steps

- Implement new technical architecture to strengthen our audit trail system capabilities and help prevent fraud; and
- Continued compliance (meet or exceed targets) with all applicable cyber security guidance, best practices, mandates, and requirements related to the Cross-Agency Priority goals.

### Risks and External Factors

The following risk and external factor may affect our efforts to strengthen our cybersecurity program:

- As the agency continues to shift its business model to enable the public to use more online services, the potential for fraud will increase. Sufficient resources are essential to safeguard personal information and protect the public trust against online security threats.

### Key Initiatives

#### Protecting Our Systems and Data

We continue to strengthen our information security program to meet the standards and requirements of the *Federal Information Security Management Act of 2002*, as amended by the *Federal Information Security Modernization Act of 2014*, by training our employees and implementing effective cybersecurity technologies.

Our systems and data are constantly at risk from emerging threats and technology. We deploy new tools and techniques as threats are discovered. Software flaws pose an ongoing risk, potentially making our systems vulnerable



to malicious or accidental actions. In response, we have added additional licenses for a tool our developers use to scan their code and repair it before release if security flaws are found.

Threats to data and systems can also come from within an organization. We are rolling out an agency-wide automated access control system, replacing our current paper-based system. The new system will improve timeliness in granting and removing user access, improve accuracy in assigning access to information resources, and provide clearer audit records. We are also analyzing new technologies to review employee activity. Our changing service delivery channels and other system changes require ongoing updates to our monitoring systems.

Finally, employee security awareness and training remains a high priority. Agency-wide on-demand video training helps raise employee awareness on protecting our systems and data. Because our work often involves personal interactions, we must always be on guard against a threat known as social engineering, where people pretend to be coworkers, repair technicians, or any other role, where they could access our systems or data. We have invested heavily in special training for all of our employees to help them recognize and prevent social engineering activities and other types of activities that can cause system problems.

### **Implementing Audit Trail System New Architecture Phase II**

Our audit trail system ensures we protect our records and funds by collecting and maintaining detailed information about both internal and external transactions. The system stores data from programmatic and select Internet applications, allowing us to review transactions for signs of fraud and abuse.

The new audit trail system architecture will strengthen our fraud detection and prevention efforts by capturing details of transactions most vulnerable to fraud. The proposed architecture was approved in February 2014 and a WebSphere user interface was piloted in March 2015. Additional enhancements are planned before a full roll out in FY 2016.

### **Implementing an Information Security Program**

We maintain a comprehensive, agency-wide information security program to protect information and communications assets. We review our policies and processes continually to ensure adequate safeguards are in place to prevent misuse and unauthorized access to our systems and data. We are also strengthening the security of our systems by implementing consistent management controls at all of our data facilities.

We have completed the following activities supporting both the federal Cybersecurity Cross-Agency Priority Goals and the Department of Homeland Security's Federal Network Security Compliance and Assurance program:

- Established Trusted Internet Connection Access Provider designation through the Department of Homeland Security;
- Participated in the National Cyber Protection System, a collaboration between the Department of Homeland Security and other federal agencies to share security resources;
- Collaborated with the Department of Homeland Security to develop monthly security assessments of our public-facing network;
- Defined and implemented an information security continuous monitoring strategy to manage information security risks;
- Participated in the Department of Homeland Security's Continuous Diagnostics and Mitigation program to ensure we have an accurate view of our risks and the effectiveness of our controls. We share our computer security information across the federal civilian government agencies to help ensure they are aware of the threats to their infrastructures and can swiftly take corrective measures; and
- Implemented personal identity verification credentials, as defined in Homeland Security Presidential Directive 12, as a secure form of identification within our systems (with the exception of DDS systems, which are still in progress).

New services and delivery channels expose us to modern threats. We must be consistently diligent and continue to strengthen our cybersecurity intelligence and protections. We continually adjust our information security program to reflect changes in technology, the sensitivity of covered information and information systems, and internal or external threats to information and communications.

## Performance Measure – Strategic Objective 5.4

### 5.4a: Provide secure and effective services to the public by improving cyber security performance

Fiscal Year	2013	2014	2015	2016	2017
<b>Performance</b>	<p>Homeland Security Presidential Directive 12 Compliance – result 85%</p> <p>Information Security Continuous Monitoring – result 96%</p> <p>Trusted Internet Connections Consolidation – result 100%</p> <p>Trusted Internet Connections 2.0 Capabilities – result 96%</p>	<p>Homeland Security Presidential Directive 12 Compliance – result 87%</p> <p>Information Security Continuous Monitoring – result 98%</p> <p>Trusted Internet Connections Consolidation – result 100%</p> <p>Trusted Internet Connections 2.0 Capabilities – result 94%</p>	<p>Hardware Asset Management – result 100%</p> <p>Software Asset Management – result 100%</p> <p>Vulnerability and Weakness Management – result 100%</p> <p>Unprivileged Network Users – result 86%</p> <p>Privileged Network Users – result 99%</p> <p>Anti-Phishing Defense – result 100%</p> <p>Malware Defense – result 100%</p> <p>Blended Defense – result 100%</p>		
<b>Target</b>		<p>Meet the performance requirements of the Department of Homeland Security's Federal Network Security Compliance and Assurance program and the Cyber Security Cross-Agency Priority Goals</p>	<p>Meet the performance requirements of the Department of Homeland Security's Federal Network Security Compliance and Assurance program and the Cyber Security Cross-Agency Priority Goals</p>	<p>Achieve an average of 97% for the following Cyber Security Cross-Agency Priority Goals:</p> <p>Anti-phishing defense; Malware defense; Blended defense (anti-phishing and malware defense measures); Hardware asset management; Software asset management; and Vulnerability and weakness management.</p>	<p>Achieve an average of 99% for the following Cyber Security Cross-Agency Priority Goals:</p> <p>Anti-phishing defense; Malware defense; Blended defense (anti-phishing and malware defense measures); Hardware asset management; Software asset management; and Vulnerability and weakness management.</p>
<b>Target Met</b>		Met	Met		

**Results:** We met our FY 2015 target and are compliant in all areas of the Department of Homeland Security's Federal Network Security Compliance and Assurance program and the Cyber Security Cross-Agency Priority Goals.

**Data Definition:** Define and implement strong controls to continuously monitor the security status of network, systems, and information and ensure that individuals with access to our network resources are using strong authentication to connect.

Data Source: [Cybersecurity Cross-Agency Priority Goals on Performance.gov](#)

# Appendix A:

## Our Management and Performance Challenges

As we strive to improve our performance, we face a variety of challenges. Each year the Office of the Inspector General (OIG) identifies what it sees as our top management and performance challenges. In addition, our management identifies challenges, which often overlap with the OIG report.

Below is a listing of the challenges we have collectively identified. To avoid redundancy, the OIG report findings are listed first, since they also reflect challenges our leadership has identified. The management challenges identified by our leadership follow. Key initiatives we are undertaking to address these challenges are listed below each item.

### Challenges Identified by OIG

In fiscal year (FY) 2015, OIG identified seven top management and Social Security Administration (SSA) Management Issues. (Responsible official acronyms are listed in [Appendix F, Summary of Key Management Official's Responsibilities](#).) To read the full OIG report, please refer to the [Fiscal Year 2015 Inspector General Statement on SSA's Major Management and Performance Challenges](#).

### Improve the Responsiveness and Oversight of the Hearings Process (DCDAR)

**Challenge:** While SSA continues focusing on the quality and consistency of hearing decisions, it is facing worsening average processing times and increasing pending hearings.

Actions we are undertaking to address this challenge include:

- Expanding Video Service Delivery (pg. 42);
- Expanding Use of Electronic Bench Book (pg. 73); and
- Hiring Sufficient Administrative Law Judges to Ensure Public Access to Agency Services (pg. 75).

### Improve the Timeliness and Quality of the Disability Process (DCO, DCORDP, DCBFQM)

**Challenge:** SSA needs to address receipt of millions of initial disability and reconsideration claims and backlogs of initial disability claims and continuing disability reviews, while also protecting its disability programs from fraud and encouraging beneficiaries to return to work.

Actions we are undertaking to address this challenge include:

- Expanding Video Service Delivery (pg. 42);
- Expanding the Virtual Lifetime Electronic Record (pg. 51);
- Establishing the Office of Anti-Fraud Programs (pg. 62);
- Enhancing the Electronic Claims Analysis Tool (pg. 73);
- Developing an Occupational Information System (pg. 74);
- Updating the Medical Listing of Impairments (pg. 74);
- Developing the Disability Case Processing System (pg. 82);
- Using Health Information Technology to Expedite Disability Decisions (pg. 83); and
- Improving Employment Support Programs (pg. 86).



## Reduce Improper Payments and Increase Overpayment Recoveries (DCRDP, DCBFQM, DCO, DCS, DCDAR, OCSO)

**Challenge:** SSA is responsible for issuing over \$932 billion in benefit payments annually, to approximately 65 million people.<sup>4</sup> Given the amount of overall dollars involved in SSA's payments, even the slightest error in the overall process can result in millions of dollars in over or underpayments.

Actions we are undertaking to address this challenge include:

- Expanding Our Cooperative Disability Investigation Program (pg. 67);
- Promoting the use of Supplemental Security Income Telephone Wage Reporting System and the Supplemental Security Income Mobile Wage Reporting (pg. 65);
- Using Predictive Modeling in the Continuing Disability Review Enforcement Operation (pg. 66);
- Using Predictive Modeling in the Redetermination Process (pg. 66);
- Expanding the Access to Financial Institutions Initiative (pg. 66);
- Improving the Death Reporting System Process (pg. 67);
- Implementing Data Exchange and Verification Online (pg. 68); and
- Implementing New Tools for Debt Collection (pg. 68).

## Improve Customer Service (DCDAR, DCO, DCBFQM, DCS)

**Challenge:** SSA faces several challenges, such as increasing workloads and representative payee oversight, as it pursues its mission to deliver services that meet the public's changing needs.

Actions we are undertaking to address this challenge include:

- Expanding Online Access through Social Security Express (pg. 35);
- Enhancing Delivery Option for the Replacement Social Security Benefit Statement (pg. 36);
- Implementing Online Social Security Number Replacement Card Application (pg. 39);
- Providing Real-Time Assistance to Online Users (pg. 42);
- Hire Sufficient Administrative Law Judges to Ensure Public Access to Agency Services (pg. 75);
- Modernizing Older Software Applications (pg. 114);
- Improving Information Technology Governance and Architectural Planning (pg. 114);
- Enhancing our National 800 Number Infrastructure (pg. 117); and
- Expanding Video Conferencing Capabilities throughout the Agency (pg. 118).

## Invest in Information Technology Infrastructure to Support Current and Future Workloads (DCS)

**Challenge:** SSA faces the challenge of determining how best to use technology to accomplish its mission within its budget and resource constraints, while ensuring its information systems are secure and sensitive data are protected.

Actions we are undertaking to address this challenge include:

- Developing the Disability Case Processing System (pg. 82);
- Using Health Information Technology to Expedite Disability Decisions (pg. 83);
- Enhancing Our Infrastructure, Improving Information Technology Cost and Performance (pg. 111);
- Modernizing Older Software Applications (pg. 114);
- Improving Information Technology Governance and Architectural Planning (pg. 114);
- Enhancing the [my Social Security](#) Portal (pg. 114)

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<sup>4</sup> The figures were updated to reflect FY 2015 data, and differ from the OIG report.

- Enhancing our National 800 Number Infrastructure (pg. 117); and
- Expanding Video Conferencing Capabilities throughout the Agency (pg. 118).

## **Strengthen the Integrity and Protection of the Social Security Number (DCS)**

**Challenge:** Protecting the Social Security number and properly posting the wages reported under Social Security numbers are critical to ensuring eligible individuals receive the full benefits they are due.

Actions we are undertaking to address this challenge include:

- Increasing Electronic Wage Reporting Filing (pg. 59); and
- Deploying Management System for Personally Identifiable Information and Federal Tax Information (pg. 61).

## **Strengthen Planning, Transparency, and Accountability (COSS, CSO, DCHR, DCS, DCBFQM, DCO)**

**Challenge:** Planning, transparency, and accountability are critical factors in effective management. Failure to plan properly to meet its mission and challenges will lessen the Agency's ability to provide its services efficiently and effectively now and in the future. Similarly, mismanagement and waste, as well as a lack of transparency for citizens in Government operations, can erode trust in SSA's ability to tackle the challenges it faces.

Actions we are undertaking to address this challenge include:

- Using Predictive Modeling in the Redetermination Process (pg. 66);
- Using Predictive Modeling in Continuing Disability Review Enforcement Operation (pg. 66);
- Protecting Our Systems and Data (pg. 121);
- Implementing Information Security Program (pg. 122); and
- Implementing Audit Trail System New Architecture Phase II (pg. 122).

## **Additional Challenges Identified by Our Leadership**

### **Prevent Waste, Fraud, and Abuse**

Waste, fraud and abuse erode the public's trust in our ability to efficiently and effectively provide vital services. Prevention is critical to conserving valuable resources and meeting our mission to meet the changing needs of the public.

Actions we are undertaking to address this challenge include:

- Establishing the Office of Anti-Fraud Programs (pg. 62);
- Promoting Use of the Supplemental Security Income Telephone Wage Reporting System (pg. 65);
- Increasing Social Security Income Mobile Wage Reporting (pg. 65);
- Improving the Death Reporting System Process (pg. 67);
- Expanding the Access to Financial Institutions Initiative (pg. 66);
- Expanding Our Cooperative Disability Investigation Program (pg. 67);
- Implementing Direct Deposit Auto-Enrollment Fraud Prevention (pg. 68); and
- Adding Anti-Fraud Messages in Notices (pg. 68).

### **Have Enough Employees with the Right Skills in the Right Place at the Right Time**

Having exceptional employees with the right skills in the right place at the right time is critical to our vision for a superior customer experience and an innovative organization. Employee turnover challenges our ability to develop and retain empowered, knowledgeable, compassionate, and engaged employees.

Actions we are undertaking to address this challenge include:

- Highlighting the Pathways Programs (pg. 95);
- Reducing Skills Gaps (pg. 95);
- Using SkillsConnect to Share Talent Across Our Agency (pg. 96);

- Marketing Availability of On-Demand Training and Development (pg. 96); and
- Supporting Employees through Mentoring (pg. 96).

## **Innovate the Future of Service Delivery**

We must innovate the future of service delivery to better serve the American public. We are constantly improving current, and developing new service delivery options. Our customers expect exceptional customer service, regardless of the service delivery option they use to complete their business with us.

Actions we are undertaking to address this challenge include:

- Expanding Online Access through Social Security Express (pg. 35);
- Enhancing Delivery Option for the Replacement Social Security Benefit Statement (pg. 36);
- Implementing Online Social Security Number Replacement Card Application (pg. 39);
- Providing Real-Time Assistance to Online Users (pg. 42);
- Developing the Disability Case Processing System (pg. 82);
- Using Health Information Technology to Expedite Disability Decisions (pg. 83).
- Enhancing Our Infrastructure (pg. 111);
- Improving Information Technology Cost and Performance (pg. 111);
- Modernizing Older Software Applications (pg. 114);
- Improving Information Technology Governance and Architectural Planning (pg. 114);
- Enhancing our National 800 Number Infrastructure (pg. 117); and
- Expanding Video Conferencing Capabilities throughout the Agency (pg. 118).

## **Keep Pace in the Disability Program with Medicine, Technology, and World of Work**

Medicine, technology, and the world of work are constantly evolving. We must keep pace creating a more agile, responsive organization committed to meeting the public's needs and maximizing efficiencies throughout the disability program.

Actions we are undertaking to address this challenge include:

- Developing an Occupational Information System (pg. 74);
- Developing the Disability Case Processing System (pg. 82); and
- Using Health Information Technology to Expedite Disability Decisions (pg. 83).

# Appendix B:

## Program Evaluations

We routinely evaluate our programs by conducting a variety of studies and surveys to determine if our programs are effective. We continue to build on our collection of program data, research, and analyses to identify our program strengths and weaknesses. We use information from program evaluations to develop strategies to address the major challenges we face and to improve the day-to-day administration of our programs. We complete many of our evaluations annually while others may be one-time efforts.

We list the evaluations under the strategic goal they support from our [\*Agency Strategic Plan for Fiscal Years 2014 – 2018\*](#).

### Strategic Goal 1 – Deliver Innovative, Quality Services

#### Field Office Telephone Service Evaluation

We conduct an annual evaluation of the telephone service in our field offices. Each year, since 1999, we select a random sample of over 100 field offices across the country for the evaluation. We monitor about 2,000 randomly selected calls over the course of the year to assess the accuracy of the information representatives provide and the actions they take. The representatives do not know when we monitor their calls. We use the results of our Field Office Telephone Service Evaluation to identify training needs and clarify operating instructions for our representatives.

We assess the accuracy of the information representatives provide and the actions they take based on our program policies and operating guidelines. We use three measures of accuracy in our Field Office Telephone Service Evaluation:

- **Payment Accuracy** – indicates the percentage of calls free of payment error. A payment error occurs when a representative's information or action (or failure to give information or take action) has the potential to affect a caller's payment or eligibility for benefits adversely;
- **Service Accuracy** – reflects the percentage of calls free of service error. A service error occurs when a representative does not meet the caller's need for information, causes the caller inconvenience, or creates an unnecessary additional workload; and
- **Access and Disclosure Accuracy** – reflects the percentage of callers properly identified to permit release of personal information from our records. We previously included access and disclosure errors in the calculation of service accuracy.

Our latest published accuracy rates are for fiscal year (FY) 2014. Payment accuracy was 96.2 percent, which was comparable to the FY 2013 rate of 96.8 percent. Service accuracy was 89.2 percent, not significantly lower than the FY 2013 rate of 90.4 percent. Access and disclosure accuracy in FY 2014 was 64.8 percent. This rate was significantly lower than the FY 2013 rate of 70.3 percent by almost 6 percentage points, and reversed the improvement in access and disclosure accuracy that field offices (FO) had maintained from FY 2011 through FY 2013. The FY 2014 rate was not significantly different from the FY 2010 rate of 61.6 percent.

## National 800 Number Telephone Service Evaluation

We monitor calls to our National 800 Number to evaluate both the accuracy of the information our telephone agents provide and the actions they take. Each year, since 1989, we monitor about 3,000 calls handled by agents in our 35 call centers nationwide. We randomly select and monitor calls throughout the year based on a statistical sampling methodology. Our agents do not know when we monitor their calls. We use the results of our annual National 800 Number Service Evaluation to identify training needs and improve operating instructions for our agents.

This evaluation identifies the specific causes of error and the operating policies that our agents did not follow. It uses the same standards of payment, service, and access and disclosure accuracy as our Field Office Telephone Service Evaluation discussed above. Our latest published accuracy rates are for FY 2014. The payment accuracy rate rose significantly from 96 percent in FY 2013 to 97.8 percent in FY 2014, returning to the level sustained from FY 2011 to FY 2012. Service accuracy was 90.8 percent in FY 2014, significantly lower than the rate in FY 2013 (92.4 percent). The access and disclosure accuracy was 94.2 percent in FY 2014. This rate was significantly lower than the FY 2013 rate of 95.7 percent, but was in line with the FY 2012 rate of 94.5 percent. Updates expected in February/March 2016.

## Online Authentication Survey

The Online Authentication Survey (OAS) focused on the satisfaction of customers who visited a field office to complete their *my Social Security* account registrations after encountering a problem during the online process. The OAS measured satisfaction with key aspects of the service experience and obtained an overall rating of the online account registration process using our standard six-point rating scale: excellent, very good, good (E/VG/G), fair, poor, or very poor. In addition to addressing satisfaction with the online registration process, the survey also assessed satisfaction with service received during the field office visit or on the telephone.

Our FY 2015 results are not yet available. Our FY 2014 survey found that responder perceptions of the process for resolving an online registration problem and creating an account improved significantly compared with FY 2013. Responders gave a rating of 86 percent E/VG/G for their “start-to-finish” experience creating the account, up from 77 percent E/VG/G in FY 2013. Improved perceptions of telephone service in connection with the account registration contributed to the overall improvement. The rating of telephone service overall rose by 11 percentage points to 71 percent E/VG/G in FY 2014, following the introduction of the *my Social Security* 800 number Help Desk. Ratings of other aspects of the telephone experience, such as ease of access, also improved by a margin of 6 to 17 percentage points. Responders continued to report a high degree of satisfaction with the service they received when they visited the field office, rating the in-person service experience at 91 percent E/VG/G.

## Service Satisfaction Surveys

We measure satisfaction with our services by surveying people who use them. The Service Satisfaction Surveys we conduct reflect the public’s perception of the services we provide in person or by telephone at our National 800 Number, and in our FOs. In addition to obtaining ratings of various aspects of service, the surveys elicit factual information about customer experiences, and ask about their preferences for conducting future business, including the potential for Internet use. The surveys also address customers’ need for special accommodations due to medical condition. The feedback helps us identify strengths and weaknesses in our service delivery so we can make necessary improvements. In addition to reporting satisfaction rates from our surveys here, we make them available to the public on [Data.gov](https://data.gov).

## Telephone Service

Results from our FY 2015 surveys of telephone callers showed that overall satisfaction with our FO telephone service remained stable, while satisfaction with our national 800 number service improved significantly. Callers rated the 800 number service overall at 71 percent excellent, very good, or good (E/VG/G), up from 66 percent E/VG/G in FY 2014. Callers rated FO telephone service overall at 77 percent E/VG/G, in line with the FY 2014 rating of 79 percent E/VG/G.

The rise in satisfaction with 800 number access (53 percent, up from 44 percent E/VG/G) contributed to improvement in callers' overall satisfaction in FY 2015. Satisfaction with access to FO telephone service held steady in FY 2015 at 72 percent E/VG/G.

Customers who conducted their business over the telephone were equally satisfied with the quality of service employees provided whether they called the 800 number or a FO, giving ratings ranging from 87 to 90 percent E/VG/G.

## In-person Service

The Office Visitor Survey (OVS) includes two separate segments, the FO and hearing office (HO) segment, and the Social Security Card Center (SSCC) segment.

FO visitors reported favorable impressions of in-person service, providing an overall rating of 90 percent E/VG/G. In addition to their office waiting time rating of 75 percent E/VG/G and their employee attribute ratings of 91 to 92 percent E/VG/G, FO visitors gave positive ratings for other key aspects of their experience. HO visitors were also highly satisfied with the service they received when they visited an HO. HO visitors rated both overall service and office waiting time at 85 percent E/VG/G. Rating of employee attributes from HO visitors ranged from 88 to 94 percent E/VG/G. We cannot compare the FY 2015 FO and HO visitors' satisfaction rates to the previous fiscal year because we were not able to conduct the FO and HO segment due to the Government furlough in October 2013.

Overall satisfaction with in-person service in SSCCs increased significantly in FY 2015, up from 86 percent to 91 percent E/VG/G. In FY 2015, SSCC visitor's waiting time rating of 74 percent E/VG/G also reflected significant improvement over their FY 2014 rating of 67 percent E/VG/G. In addition, SSCC visitor's already favorable ratings of employee courtesy and the clarity of their explanations both rose by 3 percentage points to 93 percent E/VG/G.

## Retirement Applicant Survey

We conducted the Retirement Applicant Survey (RAS) for the first time in FY 2014 as a complement to our biennial Prospect Client Survey. The RAS fills a gap in the agency's knowledge about customer perception of one of its core business processes. The survey measured satisfaction of retirement benefit applicants who filed online, in person, or on the telephone, and explored their future preferences for conducting Social Security business. The RAS found an exceptionally high level of satisfaction with the retirement application process, with respondents rating their overall experience at 96 percent E/VG/G. Applicants were pleased with the ease and speed of the process, regardless of the filing method they used, and gave high marks to agency staff.

About 7 out of 10 respondents indicated that they use the Internet, and over half (53 percent) of those Internet users said they had already created a [my Social Security](#) account. Among the remaining Internet users who had not yet created a [my Social Security account](#), the majority (62 percent) said they would be very or somewhat likely to create one, with 21 percent choosing the top response of very likely.

## Strategic Goal 2 – Strengthen the Integrity of Our Programs

### Annual Report of the Board of Trustees of the Federal Old-Age and Survivors Insurance and Federal Disability Insurance Trust Funds

The Social Security Act requires the Board of Trustees of the Old-Age and Survivors Insurance and Disability Insurance Trust Funds to report annually to Congress on the actuarial status and financial operations of the Trust Funds. [The 2015 Annual Report of the Board of Trustees of the Federal Old-Age and Survivors Insurance and Federal Disability Insurance Trust Funds](#), issued in July 2015, includes projections for years 2015 to 2089. The 2015 report showed a slightly improved projected long-term financial status of the Social Security program as compared to the Trustees' 2014 report.



Highlights in the report included:

- Non-interest income fell below program costs in 2010 for the first time since 1983. Program costs are projected to exceed non-interest income throughout the remainder of the 75-year projection period;
- The combined Old-Age and Survivors Insurance and Disability Insurance Trust Fund reserves are still growing and will continue to do so through 2019. Beginning in 2020, the cost of the program is projected to exceed total income, and the trust fund reserves will begin to decline;
- The projected point at which the combined Trust Fund reserves will become depleted, if Congress does not act before then, comes in 2034 – extended one year from the estimate in last year’s report;
- The projected point at which the Disability Insurance Trust Fund reserves will become depleted is 2016 – unchanged from the estimate in last year’s report; and
- The projected actuarial deficit over the 75-year long-range period is 2.68 percent of taxable payroll – improved from 2.88 percent in last year’s report.

## Annual Report of the Supplemental Security Income Program

We report annually to the President and to Congress the status of the Supplemental Security Income (SSI) program. The report’s purpose is to provide the necessary data to manage the SSI program effectively. The [2015 SSI Annual Report](#), issued in August 2015, includes projections for years 2015 to 2039.

Major findings of the report included:

- By 2039, the end of the 25-year projection period, we estimate that the Federal SSI recipient population will reach 9.1 million. The projected growth in the SSI program over the 25-year period is largely due to the overall growth in the U.S. population, though the growth in the SSI recipient population is projected to be somewhat slower than the growth in the U.S. population.
- As a percentage of the total U.S. population, the number of Federal SSI recipients decreased slightly from 2.53 percent in 2013 to 2.51 percent in 2014. We project this percentage to gradually decline throughout the 25-year projection period, reaching 2.33 percent of the population in 2039.
- We estimate that Federal expenditures for SSI payments in calendar year 2015 will increase by \$1.0 billion to \$55.2 billion, an increase of 1.9 percent from 2014 levels.
- In dollars adjusted by the Consumer Price Index to 2015 levels, we project Federal expenditures for SSI payments will increase to \$60.8 billion in 2039, a real increase of 0.5 percent per year.
- Federal SSI expenditures expressed as a percentage of the Gross Domestic Product (GDP) were 0.31 percent in 2014. We project that expenditures, as a percentage of GDP will decrease to 0.30 percent of GDP in 2015, and continue to decline thereafter to 0.21 percent of GDP by 2039.

## Preeffectuation Review of Disability Determinations

Public Law 96-265, Public Health and Welfare, Section 221-c, requires us to review at least 50 percent of all Social Security Disability Insurance (SSDI) and concurrent SSDI/SSI adult disability favorable initial and reconsideration determinations made by the state disability determination services (DDS). In addition, Public Law 109-171, Deficit Reduction Act, requires we review at least 50 percent of all SSI adult initial and reconsideration favorable determinations made by the DDS.

We select Preeffectuation Review (PER) cases from all 54 DDS jurisdictions (the 50 states, plus U.S. territories) using a statistical model to identify allowances with a higher probability of containing substantive errors (i.e., potential to ultimately reverse the determination from allowance to denial).

Three agency components work in conjunction with the Centers for Medicare and Medicaid Services to produce a report to Congress on the lifetime savings resulting from PER.

The most recent PER Report to Congress for FY 2013 shows estimated program savings of \$668 million, which include Medicare and Medicaid savings. Preliminary data for FY 2014 indicates that more than 6,500 DDS determinations were reversed, but the program savings information is not yet available. We will make the FY 2014 and FY 2015 results available in a future Annual Performance Report.

## Retirement, Survivors, and Disability Insurance Stewardship Review

Stewardship findings provide the basic measure we use to report on the accuracy of the Old-Age, Survivors, and Disability Insurance (OASDI) payments. We base the FY 2014 report findings on non-medical reviews of monthly samples of OASDI payments issued from October 2013 through September 2014. We also provide payment accuracy rates for the current and previous reporting periods. We will publish the FY 2015 findings in the FY 2016 Annual Performance Report.

Overall, the OASDI accuracy rate was 99.5 percent for overpayments in FY 2014 based on improper payments totaling a projected \$4.6 billion (i.e., 99.5 percent of all dollars paid were free of overpayment errors).

Accuracy for OASDI underpayments was 99.9 percent in FY 2014, based on unpaid dollars projected at \$4.72 billion (i.e., underpayment dollar errors, as a percentage of total dollars paid, were 0.05 percent).

Comparable accuracy rates for FY 2013 were 99.8 percent for overpayments and 99.9 percent for underpayments. The changes in the overall OASDI overpayment and underpayment accuracy rates are not statistically significant.

## Supplemental Security Income Stewardship Review

The review evaluates non-medical factors of eligibility and measures the accuracy of payments made to people receiving SSI benefits. The primary objective is to measure the accuracy of payments we issued and to report these accuracy rates as required by the *Improper Payments Information Act of 2002* and the *Improper Payments Elimination and Recovery Act of 2010*.

We reviewed 4,015 SSI cases in FY 2014. Accuracy rates are derived using data from the review of SSI cases with a payment made in at least one month of the fiscal year under review. Any difference between what we actually paid and what the quality review determines we should have paid is expressed as an overpayment or underpayment error. The overpayment accuracy rate is the percentage of all dollars paid that are free of overpayment errors. The underpayment accuracy rate is the projected dollar value of underpayment errors represented as a ratio of all dollars paid. The overpayment and underpayment accuracy rates are calculated and reported separately.

In FY 2014, the overpayment accuracy rate was 93.0 percent based on overpaid dollars totaling a projected \$3.9 billion. This represents an increase of 0.6 of a percentage point from the FY 2013 overpayment accuracy rate of 92.4 percent, but this increase is not statistically significant.

In FY 2014, the underpayment accuracy rate was 98.5 percent based on underpaid dollars totaling a projected \$0.8 billion. This represents an increase of 0.2 of a percentage point from the FY 2013 underpayment accuracy rate of 98.3 percent. We will publish the FY 2015 findings in the FY 2016 Annual Performance Report.

## Strategic Goal 3 – Serve the Public through a Stronger, More Responsive Disability Program

### Office of Quality Review Denial Review

In FY 2015, we conducted an internal control review of medically denied disability applications adjudicated by the DDS and Federal Disability Case Processing Sites (FDCPS). We conducted this review to identify whether denial decisions by the DDS and the FDCPS were policy compliant and supported by the medical and vocational evidence in the case file.

We reviewed 52,165 cases from 52 DDS sites (all 50 states, the District of Columbia, and the Commonwealth of Puerto Rico) and 9 FDCPSs. To select the cases, we used a statistical model to identify cases that matched the profile for highly error-prone medically denied disability applications. Out of the 52,165 cases we reviewed, 4,935 (9.5 percent) contained a substantive error (i.e., an error that could result in a change in the determination of the case).

Our review of denials in FY 2015 resulted in the reversal of 2,849 DDS denial determinations to allowances. These reversals resulted in claimants receiving their benefits at an earlier stage in the process.



## Quality Review Assessment of Senior Attorney Advisor Disability Decisions

In our FY 2014 Quality Review Assessment of Senior Attorney Advisor (SAA) Disability Decisions, we agreed with 80 percent of the 627 sampled SAA decisions, because a preponderance of the evidence supported those decisions. We disagreed with 20 percent of the allowance decisions for two main reasons: there was not enough information in file to support the decision or there was conflicting information in file. We cannot compare the FY 2014 findings with prior year reports, because we made substantial changes to our review process.

## Disability Case Review of Administrative Law Judge Hearing Decisions

The disability case review is an ongoing, post-effectuation quality review of administrative law judge (ALJ) hearing decisions. The last year for which we have data is FY 2014.

For the FY 2014 Disability Case Reviews of ALJ decisions, we agreed with 84 percent of the 431 sampled ALJ allowance decisions because a preponderance of the evidence supported those decisions. This reflects improvement, but is not a statistically significant increase from the 82 percent agreement rate in FY 2014.

We agreed with 98 percent of the 433 sampled ALJ denial decisions based on a preponderance of evidence. When comparing this finding to the 94 percent agreement rate reported in FY 2013, the difference is statistically significant.

## Disability Scorecard Surveys

The disability scorecard surveys measure customer satisfaction with the disability application process at the initial and hearing levels. We conduct the initial and hearing level surveys in alternate years. Our survey samples include both SSDI and SSI claimants in the following groups that reflect different stages of the process:

- **Mid-process** – after an initial disability application is filed but before a decision is made;
- **Initial awards and denials** – after the initial level decision on the application; and
- **Hearing awards and denials** – after the hearing level decision on the application.

We ask those surveyed for an overall rating of the service we provided during the disability application process. Survey findings consistently show that respondent opinion is influenced greatly by the outcome of the application for disability benefits. Our latest results are for FY 2014, when we conducted the initial level segment of the disability scorecard surveys. The results of the Mid-Process Survey show that respondents are for the most part satisfied with the initial disability process at the time they file but before a decision is made, rating overall service 81 percent excellent, very good, or good (E/VG/G). In FY 2014, awarded responders were highly satisfied with the service they received rating overall service 91 percent E/VG/G. At just 51 percent E/VG/G, denied responders rated overall service the lowest of the three groups of responders, no doubt influenced by the unfavorable decision on the claim. In FY 2015, we are conducting the hearing level surveys. We anticipate publishing results in early FY 2017.

## Strategic Goal 4 – Build a Model Workforce to Deliver Quality Service

### Federal Employee Viewpoint Survey (formerly the Annual Employee Survey/Federal Human Capital Survey)

The U.S. Office of Personnel Management sent the 2015 Federal Employee Viewpoint Survey to approximately 19,000 of our employees. Our employees had from May 6, 2015 through June 12, 2015 to take the survey. Over half of our permanent employees completed the survey.

We use the Federal Employee Viewpoint Survey results as a tool for measuring employee satisfaction and engagement throughout our agency. We also use the results to develop both departmental and agency-wide action plans to address areas targeted for improvement. Traditionally, results demonstrate that employee job satisfaction is one of the strengths of our agency.

For more information about survey results, see the [Federal Employee Viewpoint Survey](#).

## Management Directive-715

The directive provides policy guidance and standards for establishing and maintaining effective affirmative action programs. The Equal Employment Opportunity Commission (EEOC) Management Directive-715 requires federal agencies to conduct an annual self-assessment of their Equal Employment Opportunity (EEO) program to ensure it meets the requirements for each of the six essential elements of a model program. The assessment occurs in the first quarter of a fiscal year, with the report due to the EEOC in the second quarter of the fiscal year.

Below, we present our FY 2014 results, which were not available when we published our *FY 2014 Annual Performance Report*.

The Equal Employment Opportunity Commission's (EEOC) evaluation of our EEO complaint process and anti-harassment programs and its Program Evaluation Report suggested additional opportunities for our leadership to demonstrate their commitment to EEO principles. The Acting Commissioner meets each month with the OCREO Associate Commissioner (SSA's EEO Director) to improve communications and oversight. The Acting Commissioner also designated a Senior Advisor from her immediate staff to monitor OCREO's actions toward becoming a model EEO program. The OCREO Associate Commissioner and the Senior Advisor meet regularly to keep the Senior Advisor apprised of OCREO's efforts to address each of the recommendations in the Program Evaluation Report.

The Acting Commissioner and our executives also support and encourage the following four cross-component workgroups created in FY 2014 to address several recommendations from the Program Evaluation Report:

- **Anti-Harassment Workgroup** – to clarify the existing Anti-Harassment Policy and prepare Standard Operating Procedures for processing harassment allegations;
- **Alternative Dispute Resolution Workgroup** – to increase management and employee use of mediation for early, reasonable resolution of EEO complaints;
- **Standard Operating Procedures Workgroup** – to create a process that will ensure the consistent use of legally compliant and universally applied EEO processes and procedures; and
- **Uniform EEO Training Workgroup** – to create a standardized package of EEO training materials for agency-wide use, to provide consistent, legally compliant EEO training to all agency managers and employees.

In response to our FY 2014 Management Directive-715 self-assessment, we took the following actions to strengthen our EEO program:

- Revised our anti-harassment policy and developed standard operating procedures to:
  - Implement and enforce uniform policy throughout the agency;
  - Assign oversight responsibility to the Office of Human Resources;
  - Designate harassment prevention officers, investigators, and independent reviewers;
  - Avoid conflict of interest; and
  - Establish a uniform tracking system to allow the Office of Human Resources to identify patterns or trends.
- Drafted a policy on the "Role of the Office of the General Counsel in the Equal Employment Opportunity Process" to clarify the role of the Office of the General Counsel at each stage of the EEO process;
- Initiated a benchmarking program to examine best practices, collaborate with other federal agencies, and improve our EEO program.
- Worked with a contractor to evaluate our vacancy announcement process. The contractor also created a survey to collect employee perceptions on diversity, inclusion, and EEO to ensure that our programs, initiatives, and outreach efforts are meeting our employees' needs; and
- Began training headquarters managers on Alternative Dispute Resolution (ADR) to resolve workplace disputes in a positive and constructive manner. We will offer training to field office managers and will refresh the ADR video on demand.

We will discuss the results of our FY 2015 assessment in our FY 2016 Annual Performance Report.

## Center for Section 504 Compliance

We ensure agency compliance with Section 504 of the Rehabilitation Act of 1973, which prohibits discrimination against individuals with disabilities and requires federal agencies to provide meaningful access to their programs and activities to individuals with disabilities. In FY 2014, we developed an Intranet application, iAccommodate, to track the accommodations that our employees provide to individuals with disabilities.

In FY 2015, we released iAccommodate 2.1, which improves our ability to track accommodations. iAccommodate 2.1 integrates with the Visitor Intake Process (VIP) and the Case Processing Management System (CPMS), offering quick links to document accommodations provided. Screen enhancements included in iAccommodate 2.1 improve usability and management information, allowing us to create detailed management information charts that analyze Section 504 accommodations by component, region, or specific office code.

## The Diversity and Inclusion Survey

The Diversity and Inclusion (D&I) Survey measures employee perceptions of diversity, inclusion, and equal employment opportunity (EEO) in the agency, allowing us to determine whether employee perceptions are supported by actual statistical data. The results will ensure that we are making informed decisions about our programs, training initiatives, and outreach efforts.

The Barrier Obliteration Program (BOP) will proactively identify and eliminate real and perceived barriers to EEO. Collaborating with a contractor, we are analyzing D&I Survey results; Workforce Profiles; and data on EEO complaints, awards, appraisals, promotions, hiring, and separations, among other EEO datasets. The analysis will identify any potential triggers or barriers to EEO in individual Deputy Commissioner-level components. If identified, we will work with the contractor and individual components to prepare an Action Plan to reduce and potentially eliminate them.

## Strategic Goal 5 – Ensure Reliable, Secure, and Efficient Information Technology Services

### Federal Information Security Management Act Report

The Federal Information Security Management Act (FISMA) is part of the E-Government Act of 2002. FISMA is a framework requiring federal agencies to ensure they provide adequate security and privacy protections for federal information systems and information. We must submit an annual FISMA status report to the Office of Management and Budget.

Our report summarizes the results from security and privacy reviews conducted on our major information systems and programs, progress on correcting identified weaknesses, and the results of other work performed during the reporting period using the Office of Management and Budget's performance measures. Several bills are pending in Congress intended to strengthen FISMA. As Congress considers new cybersecurity legislation, we will continue our efforts to meet and exceed existing information security requirements for protecting federal information systems and personally identifiable information.

For more information, please refer to the complete report, [\*FY 2011 Report to Congress on the Implementation of the Federal Information Security Management Act of 2002\*](#).

# Appendix C:

## How We Ensure Our Data Integrity

We are committed to providing clear, reliable, and valid data. We have internal controls to ensure that our data are quantifiable, verifiable, and secure. Our internal systems and controls include:

- Audit trails;
- Integrity reviews;
- Separation of duties;
- Restricted access to sensitive data;
- Reviews at all levels of management; and
- Validation and verification in our System Development Life Cycles.

We designed these controls to safeguard the integrity and quality of our vast data resources. These controls ensure that our data contain no material inadequacies. These same controls support the Commissioner's Federal Managers' Financial Integrity Act Assurance Statement.

### Data Integrity Systems and Controls

We gather performance data using automated management information and other workload measurement systems. In fiscal year (FY) 2010, we initiated a new data quality program designed to assess, measure, and monitor the quality of performance data.

We evaluate the data in terms of four quality dimensions:

- Accuracy – measuring how well data adheres to specification (e.g., definitions, rules, and policies);
- Consistency – measuring consistency in internal and external reporting of data;
- Completeness – measuring missing occurrences or attributions of the data; and
- Timeliness – measuring the currency of the data (i.e., data are up to date, and reporting occurs on time).

We conduct these quality evaluations based on established internal methodologies. As we introduce new performance measures, we perform a comprehensive data assessment using these four quality dimensions. From the assessment results, we establish a baseline. After the baseline, we automate continuous monitoring to sustain high-quality data. Continuous monitoring allows us to follow data trends and proactively remediate potential issues.

In FY 2013, we performed baseline assessments for the following performance measures:

- Increase the percentage of claims filed online;
- Net disability determination services accuracy by state;
- Medicare determinations by state; and
- Enumeration accuracy.

We conducted these assessments in addition to continuously monitoring previously base lined performance measures, thereby expanding data quality program.

In our data quality program, we also derive several accuracy and public satisfaction measures from surveys and work samples. These measures provide confidence levels of 95 percent or higher.

As part of our fiduciary responsibility to the public, we use an Audit Trail System (ATS) to protect our records and taxpayer funds from improper use. The Audit Trail System collects and maintains detailed information about SSA and public transactions. We store the data from programmatic and select internet applications, so we can review transactions for fraud and abuse.

## Audit of Our FY 2015 Financial Statements

The Chief Financial Officers Act of 1990 requires the Office of the Inspector General (OIG) or an independent external auditor that it selects to audit our financial statements. OIG selected Grant Thornton, LLP to conduct the FY 2015 audit. The auditor found we present fairly the basic financial statements, in all material respects, in conformity with accounting principles generally accepted in the United States of America for Federal entities. The auditor also found that management fairly stated that our internal control over our financial reporting was operating effectively.

The audit includes examining, on a test basis, evidence supporting the amounts and disclosures in the financial statements. The audit did not find instances of noncompliance with laws, regulations, or other materials tested.

## Role of the Office of the Inspector General

The Office of the Inspector General (OIG) plays a key role in protecting our programs and operations from waste, fraud, and abuse. OIG conducts independent and objective audits, evaluations, and investigations. OIG provides timely, useful, and reliable information and advice to agency officials, Congress, and the public.

OIG's Office of Audit conducts performance audits and makes recommendations to make sure we achieve our program objectives.

In late FY 2014, OIG issued an audit, evaluating two of our Government Performance and Results Act (GPRA) Modernization Act of 2010 performance indicators: (1) Recruit and hire veterans and disabled veterans, and (2) Employ individuals with targeted disabilities. In early FY 2015, OIG issued another audit evaluating one GPRA Modernization Act of 2010 performance indicator, Minimize average wait time for initial disability claims.

The reports are:

- [Performance Indicator Audit: Recruiting and Employment Indicators \(A-13-14-14033\)](#); and
- [Performance Indicator Audit: Minimize Average Wait Time for Initial Disability Claims \(A-07-14-24004\)](#).

The objectives of these audits were to:

- Document the sources of data collected to report on the performance indicators;
- Identify and test critical controls of systems from which the specified performance data were gathered;
- Test the adequacy, accuracy, reasonableness, completeness, and consistency of the underlying data for the specified performance indicators; and
- Recalculate the values reported for the indicators to verify accuracy.

For the performance indicators, recruit and hire veterans and disabled veterans, and employ individuals with targeted disabilities, OIG stated:

"Underlying data used for reporting SSA's FY 2012 Recruiting and Hiring Veterans and Disabled Veterans was adequate, reasonable, complete, and consistent; and we were able to recalculate the performance reported for both PIs using data provided by SSA. However, we were unable to test the underlying data for Employing Individuals with Targeted Disabilities because updated employee disability status information replaced the previous disability data in the FPPS, and the Agency was not required to maintain the forms submitted by employees. Furthermore, the Agency did not include employees converted from temporary to permanent employment in its performance reporting for recruiting and hiring veterans and disabled veterans. However, starting in FY 2015, the Agency will adopt a new OPM performance model. Lastly, SSA incorrectly identified the data source for both PIs in certain performance reports."

For the third performance indicator, minimize average wait time for initial disability claims, OIG stated:

"Underlying data used to report the PI were adequate, accurate, reasonable, complete, and consistent; and we were able to recalculate the performance reported for the PI using data provided by SSA. Our assessment of the PI did not identify any significant exceptions related to the accuracy of presentation or disclosure of the information related to the PI in the AFR or to the PI's meaningfulness.

However, during our evaluation of the effectiveness of the control environment over the business process, we found claims representatives did not always ask the applicants all of the questions SSA policy requires to verify identity. Because not all of the required identity questions were asked, there is an increased risk of an individual using the identity of another person to file a fraudulent claim to obtain benefits.”

These and other OIG reports are located on [OIG's webpage](#).

# Appendix D:

## Changes to Performance Measures

### Results for Discontinued Fiscal Year 2014 Performance Measures

Results for these measures were not available until after we published our

[Annual Performance Report 2014-2016](#).

#### 2.3b: Maintain the low percentage of improper payments made under the Old-Age, Survivors, and Disability Insurance Program

Fiscal Year	2009	2010	2011	2012	2013	2014	2015	2016
Performance	0.5%	0.6%	0.4%	0.3%	0.3%	0.6%		
Target						No more than 0.4% of all payments made under the Old-Age, Survivors, and Disability Insurance program are improper payments (i.e., overpayment and underpayments)		
Target Met						Not Met		

**Results:** We did not meet our FY 2014 target. Our improper overpayment rate was 0.5 percent and our total improper underpayment rate was 0.1 percent.

**Data Definition:** We determine Old-Age, Survivors, and Disability Insurance payment free of overpayment and underpayment error by an annual review of a statistically valid sample of the beneficiary rolls. We determine the overpayment error rate by dividing the total overpayment error dollars by the total dollars paid for the fiscal year. We determine the underpayment error rate by dividing the total underpayment error dollars by the total dollars paid for the fiscal year.

**Data Source:** Old-Age, Survivors, and Disability Insurance Stewardship Report

### 3.3a: Achieve the target number of beneficiaries participating in the Ticket to Work program who begin earning above a certain level

Fiscal Year	2014	2015	2016
Performance	1,420 beneficiaries		
Target	1,300 beneficiaries		
Target Met	Met		

**Results:** We exceeded our target for FY 2014.

**Data Definition:** The number of Social Security Disability Insurance, Supplemental Security Income and concurrent beneficiaries who have achieved trial-work-level earnings for the first time within 12 months after assigning their Ticket to an employment network or to a state vocational rehabilitation agency operating as an employment network. Beneficiaries achieving trial-work-level earnings prior to Ticket assignment will not be counted in this measure, nor will beneficiaries who place their Ticket in use with vocational rehabilitation. Ticket assignments that occur in the previous fiscal year may be counted if trial-work-level earnings are first achieved within the reporting period.

**Data Source:** Office of Child Support Enforcement earnings database and the Disability Control File

## Performance Measures Established in Fiscal Year 2016

<b>1.1b APG NEW</b>	Improve customer service and convenience by increasing online transactions by 25 million each year
<b>1.2e APG NEW</b>	Increase customer satisfaction with our services
<b>1.4b NEW</b>	Assess field and hearing office lease expirations and increase colocation of our field and hearing offices to reduce our physical footprint
<b>2.3c APG NEW</b>	Improve the integrity of the SSI program by ensuring that 95 percent of our payments are free of overpayment
<b>3.1c APG NEW</b>	Improve customer service by reducing the wait time for a hearing decision
<b>4.3c NEW</b>	Increase employee engagement as measured by the employee engagement index score
<b>5.2b NEW</b>	Improve customer service by using information technology to provide new online services to users of <a href="#">my Social Security</a>



## Carryover Performance Measures with Title Changes

Fiscal Year 2016 New Title		Fiscal Year 2015 Old Title
<b>2.1a</b>	Improve the accuracy and timeliness of the earnings data used to calculate benefits	Redesign our earnings system to improve the accuracy and timeliness of the earnings data used to calculate benefits
<b>3.1a</b>	Ensure the quality of our decisions by achieving the DDS net accuracy rate for initial disability decisions	Ensure the quality of our decisions by achieving the DDS decisional accuracy rate for initial disability decisions
<b>3.2a</b>	Improve the disability determination process by increasing the percentage of initial disability claims using electronically transmitted health records and medical evidence (Health IT)	Improve the disability determination process by increasing the percentage of initial disability claims with health information technology (IT) medical evidence
<b>4.1b</b>	Strengthen workforce diversity by maintaining the representation of employees with targeted disabilities	Achieve the target on-board representation of employees with targeted disabilities
<b>4.2a</b>	Strengthen workforce competence by improving our talent management index score	Reduce skills gaps for leaders and potential leaders to improve leadership competencies
<b>4.4a</b>	Lay the foundation for building a 21 <sup>st</sup> century workforce by meeting or exceeding targeted human resources measures	Achieve target number of human capital metrics to ensure progress toward building a model workforce

# Appendix E:

## Summary of Key Management Officials' Responsibilities

**Commissioner of Social Security (COSS), Carolyn W. Colvin (Acting)**, manages all agency programs and staff. Also serves as the Chief Operating Officer, responsible for improving agency management and performance.

**Deputy Commissioner of Social Security (DCOSS), VACANT**, an appointed position, authorized to act on behalf of the COSS.

**Chief Strategic Officer (CSO), Ruby Burrell**, advises and assists the Commissioner to ensure that we achieve our mission and goals through strategic and performance planning, measurement, analysis, regular assessment of progress, and the use of performance information to improve the results achieved. The CSO also oversees our transparency efforts and serves as the **Performance Improvement Officer**.

**Chief Actuary (CAct), Stephen C. Goss**, plans and directs program actuarial estimates and analyses for our programs and for any proposed changes in programs and trust funds. The CAct provides technical and consultative services to the COSS, the Board of Trustees of the Social Security Trust Funds, Congress, and their respective staffs.

**General Counsel (GC), Andy Liu**, advises the COSS, DCOSS, and all subordinate organizational components (except the Inspector General) on legal matters.

**Inspector General (IG), Patrick P. O'Carroll Jr.**, promotes economy, efficiency, and effectiveness in administering our programs and operations, and prevents and detects fraud, waste, abuse, and mismanagement.

**Deputy Commissioner for Budget, Finance, Quality, and Management (DCBFQM), Michelle King (Acting)**, directs our comprehensive management programs including budget, quality reviews and studies, financial policy, acquisition, grants, facilities supply management, and security and emergency preparedness. The DCBFQM also serves as the **Chief Financial Officer**.

**Deputy Commissioner for Communications (DCCOMM), Douglas K. Walker**, conducts our national public information and outreach programs and fosters the transparency of our operations.

**Deputy Commissioner for Disability Adjudication and Review (DCDAR), Theresa L. Gruber**, administers our nationwide appeal and review program in accordance with relevant federal laws.

**Deputy Commissioner for Human Resources (DCHR), Reginald F. Wells, Ph.D.**, administers our human resources programs, including training, human capital initiatives, personnel and employee relations, labor management, and civil rights and equal opportunity. The DCHR also serves as the **Chief Human Capital Officer** and as the senior accountable official on employee engagement initiatives.

**Deputy Commissioner for Legislation and Congressional Affairs (DCLCA), Judy L. Chesser**, develops and conducts our legislative program, serves as our liaison to Congress, and analyzes legislative and regulatory initiatives.

**Deputy Commissioner for Operations (DCO), Nancy A. Berryhill**, directs our network of field offices, National 800 Number Teleservices Centers, and Processing Centers. The DCO oversees the disability determination services.

**Deputy Commissioner for Retirement and Disability Policy (DCRDP), Virginia P. Reno**, advises the COSS on the major policy issues and is responsible for all major activities in the areas of program policy planning, policy research and evaluation, statistical programs, and overall policy development, analysis, and implementation. The DCRDP serves as liaison with the Centers for Medicare and Medicaid Services. The DCRDP also serves as the accountable official for improper payments and leads our efforts to improve the clarity, tone, and readability of our notices.

**Deputy Commissioner for Systems (DCS), Robert W. Klopp**, directs the strategic management of our systems and databases, which includes the development, validation, and implementation of new systems. The DCS directs operational integration, strategic planning processes, and implementation of a systems configuration program. The DCS also serves as the **Chief Information Officer** and the **Chief Technical Officer**, responsible for managing our information technology (IT) investment process and assessing the performance of our major IT investments.

# Appendix F:

## Glossary of Acronyms

### A

AFI	Access to Financial Institutions
APG	Agency Priority Goals
ASA	Average Speed of Answer
ATS	Audit Trail System

### C

CAct	Chief Actuary
CAL	Compassionate Allowances
CAP	Cross-Agency Priority
CDR	Continuing Disability Review
CFO	Chief Financial Officer
CHO	Chief Human Capital Office
CIO	Chief Information Officer
COSS	Commissioner of Social Security
CSO	Chief Strategic Officer

### D

DCBFQM	Deputy Commissioner for Budget, Finance, Quality, and Management
DCCOMM	Deputy Commissioner for Communications
DCDAR	Deputy Commissioner for Disability Adjudication and Review
DCHR	Deputy Commissioner for Human Resources
DCLCA	Deputy Commissioner for Legislation and Congressional Affairs
DCO	Deputy Commissioner for Operations
DCOSS	Deputy Commissioner of Social Security
DCPS	Disability Case Processing System
DCRDP	Deputy Commissioner for Retirement and Disability Policy
DCS	Deputy Commissioner for Systems
DDS	Disability Determination Services
DoD	Department of Defense

### E

eCAT	Electronic Claims Analysis Tool
EEO	Equal Employment Opportunity
EEOC	Equal Employment Opportunity Commission
E/VG/G	Excellent/Very Good/Good

### F

FISMA	Federal Information Security Management
FPPS	Federal Personnel and Payroll System
FY	Fiscal Year

<b>G</b>	
GAO	Government Accountability Office
GC	General Counsel
GDP	Gross Domestic Product
GPRA	Government Performance and Results Act (GPRA) Modernization Act of 2010
GS	General Schedule
<b>H</b>	
HCAAF	Human Capital Accountability Framework
HCAS	Human Capital Accounting System
HHS	Department of Health and Human Services
HR	Human Resources
HRMA	Human Resources Management Assets
HRODS	Human Resources Operational Data Store
<b>I</b>	
IG	Inspector General
IT	Information Technology
iTOPSS	Internet Ticket Operations Support System
<b>O</b>	
OAS	Online Authentication Survey
OASDI	Old-Age, Survivors, and Disability Insurance
OIG	Office of the Inspector General
OMB	Office of Management and Budget
<b>P</b>	
PER	Pre-effectuation Review
PI	Performance Indicator
PPS	Partnership for Public Service
<b>Q</b>	
QDD	Quick Disability Determinations
<b>S</b>	
SAA	Senior Attorney Advisor
SSA	Social Security Administration
SSDI	Social Security Disability Insurance
SSI	Supplemental Security Income
SSN	Social Security Number
SSNAP	Social Security Number Application Process
<b>T</b>	
TBD	To Be Determined
TOP	Treasury Offset Program
TWL	Trial Work Level
<b>V</b>	
VA	Department of Veterans Affairs



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**Social Security Administration**  
**Fiscal Year 2015**  
**Bipartisan Budget Act of 2015 Section 845(a) Report**

**Bipartisan Budget Act Reporting Requirements**

Section 845(a) of the Bipartisan Budget Act of 2015 requires us to include in our annual budget a report on our activities to prevent fraud and improper payments for each (FY) fiscal year from 2016 through 2021. The report must contain:

- The total amount spent on fraud and improper payment prevention activities;
- The amount spent on cooperative disability investigation (CDI) units;
- The number of cases of fraud prevented by CDI units and the amount spent on such cases;
- The number of felony cases prosecuted under section 208 and the amount spent by our agency in supporting the prosecution of such cases;
- The number of such felony cases successfully prosecuted and the amount spent by our agency in supporting the prosecution of such cases;
- The amount spent on and the number of completed:
  - Continuing disability reviews (CDR) conducted by mail;
  - Redeterminations conducted by mail;
  - Medical CDRs conducted pursuant to section 221(i) of the Act and pursuant to 1614(a)(3)(H);
  - Redeterminations conducted pursuant to section 1611(c); and
  - Work-related CDRs to determine whether earnings derived from services demonstrate an individual's ability to engage in substantial gainful activity;
- The number of cases of fraud identified for which benefits were terminated as a result of medical CDRs, work-related CDRs, and redeterminations, and the amount of resulting savings for each such type of review or redetermination; and
- The number of work-related CDRs in which a beneficiary improperly reported earnings derived from services for more than three consecutive months, and the amount of resulting savings.

Below we provide a brief overview of our programs and anti-fraud activities. Then, we provide the information required by section 845(a) of the Bipartisan Budget Act. This report also meets the requirements of the FY 2016 Omnibus Appropriations report provisions.

Currently, we do not have the data necessary to track the amount spent on the following:

- Fraud and improper payment prevention activities;
- Cooperative Disability Investigation (CDI) Unit investigations;
- Felony cases prosecuted under section 208 including the amount spent supporting these prosecutions;
- Cases of fraud identified by redeterminations, medical and work-related CDRs including the resulting savings of each; and
- Number of work-related CDRs in which a beneficiary improperly reported earnings for more than three consecutive months including the resulting savings

In FY 2016, we will begin discussing how to capture and track the information.

### **Overview of Our Programs**

Considered one of the most successful large-scale Federal programs in our Nation's history, the Old-Age, Survivors, and Disability Insurance (OASDI) programs provide social insurance for the vast majority of our population. Workers earn coverage for retirement, survivors, and disability benefits by working and paying Social Security taxes on their earnings. About 9 out of 10 individuals age 65 and older receive Social Security benefits. The disability insurance (DI) program provides benefits to people who cannot work, because they have a medical condition expected to last at least one year or result in death. Individuals who have worked long enough and paid Social Security taxes and certain members of their families can qualify for DI benefits.

We also administer the Supplemental Security Income (SSI) program, which provides monthly payments to people with limited income and resources who are aged, blind, or disabled. Adults and children under the age of 18 can receive payments based on disability or blindness. General tax revenues fund the SSI program.

During FY 2015, we paid a total of more than \$931 billion to a monthly average of almost 65 million OASDI and SSI beneficiaries.

### **Our Anti-Fraud Efforts**

As good stewards of our resources and the Social Security and SSI programs, it is our duty to work aggressively to prevent and detect fraud and recover improper payments whether fraudulent or not.

To efficiently and effectively detect, deter, and mitigate fraud, waste, and abuse in our programs, we established the Office of Anti-Fraud Programs (OAFP) in November 2014 to provide centralized oversight and accountability of our anti-fraud initiatives. This office drives our anti-fraud efforts by sponsoring new initiatives, supporting component anti-fraud efforts,



centralizing anti-fraud analytics capabilities, and supporting the Inspector General's efforts to investigate fraud. OAFP is an integral and critical component in our efforts to implement a strategic plan that supports a comprehensive approach to fraud prevention and aligns anti-fraud efforts with the United States Government Accountability Office (GAO) report, [\*A Framework for Managing Fraud Risks in Federal Programs\*](#). The GAO report identifies leading practices for managing fraud risks and identifies control activities to prevent, detect, and respond to fraud in Federal programs.

In FY 2015, OAFP had several key accomplishments including: the use of data analytics to enhance fraud detection and the development of analytical tools to determine common characteristics and patterns; the delivery of two major national training programs: mandatory anti-fraud training and refresher training on fraud or similar fault, which supplemented local and regional anti-fraud initiatives; the coordination of a National Anti-Fraud Conference to bring together stakeholders from across the agency to share best practices and discuss FY 2016 priorities; and the successful partnership with the National Anti-Fraud Committee (NAFC), which is the focal point for SSA's anti-fraud efforts.

### **Bipartisan Budget Act Reporting Requirements**

#### Total Expenditures on our Fraud and Improper Payment Prevention Activities

In FY 2015, our operating expenses for our strategic goal to "Strengthen the Integrity of Our Programs" were \$2.007 billion. The expenditures under this goal include both our program integrity initiatives and our specific anti-fraud efforts. It is difficult to distinguish between specific efforts to reduce fraud and our overall efforts to reduce improper payments. While fraud may cause some improper payments, most improper payments are not fraud related. As a result, we do not currently have the data necessary to compute the expenditures specifically for only our anti-fraud-related activities. In 2016, we will begin discussing how we may track our anti-fraud expenditures and identify resource implications for developing separate tracking metrics. Since all fraud is improper, but not all improper payments is fraud, it is important that we have a clearly defined set of definitions and metrics.

#### Total Expenditures on Cooperative Disability Investigation (CDI) Units, the Number of Cases of Fraud Prevented by CDI Units, and the Amount Spent on Such Cases

The CDI program is a key anti-fraud initiative that plays a vital role in combating fraud, similar fault, and abuse within our disability programs. CDI units, consisting of personnel from our agency as well as the Office of the Inspector General (OIG), disability determination services (DDS), and State and local law enforcement, investigate initial disability claims and post-entitlement events involving suspected fraud. CDI units investigate claimants as well as third parties who are potentially committing or facilitating disability fraud.

The mission of the CDI program is to investigate questionable statements and activities of claimants, medical providers, and other third parties to obtain material evidence that is sufficient to resolve questions of potential fraud in the agency's disability programs.

We continue to expand our CDI program as resources allow. We currently have 37 units, covering 31 States, Washington, DC, and the Commonwealth of Puerto Rico. We plan to open additional units in FY 2016 and more in the following years.

In FY 2015, we spent approximately \$28 million<sup>1</sup> on CDI units, which includes personnel costs, training, travel, and equipment. CDI investigations resulted in 6,513 claims ceased or denied in FY 2015 with SSA savings of over \$406 million.<sup>2</sup>

We do not track CDI-related costs on a per investigation basis. Consequently, the amount spent on investigations resulting in the cessation or denial of a claim is not available at this time. Tracking such data will require enhancements to OIG's case management system, and we will work with OIG to assess the feasibility of tracking such expense data in the future.

For FY 2016, we plan to spend approximately \$31 million<sup>3</sup> on CDI units.

The Number of Felony Cases Prosecuted Under Section 208 and the Amount Spent by the Social Security Administration in Supporting the Prosecution of Such Cases; the Amount of Such Felony Cases Successfully Prosecuted and the Amount Spent by the Social Security Administration in Supporting the Prosecution of Such Cases

Our OIG examines and investigates allegations of fraud, waste, abuse, and mismanagement in our programs and operations. These allegations may involve issues such as benefit fraud, Social Security Number misuse, violations by our employees, or fraud related to grants and contracts. OIG's investigations often result in criminal or civil prosecutions or the imposition of civil monetary penalties (CMP) against offenders. These investigative efforts improve our program integrity by recovering funds and deterring those contemplating fraud against the agency in the future.

The determination as to whether to proceed with a criminal prosecution under section 208 of the Social Security Act [42 U.S.C. 408] based upon an OIG investigation rests with the appropriate United States Attorney's Office. The United States Attorney may decide to prosecute the case not under section 208 but another Federal Criminal statute applicable to the facts of the OIG investigation. If an OIG investigation is declined for prosecution by the appropriate United States Attorney's Office, it may be prosecuted in the appropriate State Court.

In FY 2015, OIG investigations resulted in the successful felony prosecution of 178 subjects under section 208, resulting in approximately \$8.2 million in restitution ordered to our agency. In FY 2015, OIG investigations also resulted in successful prosecution of 1,064 subjects

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<sup>1</sup> This figure includes OIG funds.

<sup>2</sup> The 6,513 claims ceased or denied do not represent the number of cases of fraud prevented by CDI units as defined by statute.

<sup>3</sup> This figure includes OIG funds.

under other statutes such as 42 U.S.C. 1383 – SSI fraud; 18 U.S.C. 641 – Theft of Government Property; and 18 U.S.C. 1001 – False Statements resulting in over \$44.7 million in additional restitution ordered to our agency.

Limiting the reporting of cases prosecuted to section 208 likely underrepresents the number of OIG cases involving fraud against our programs that resulted in a successful prosecution, as the prosecuting attorney has discretion when seeking criminal charges. A successful prosecution is prosecution that results in a conviction including pretrial diversions. In many investigations involving fraud against our programs, which a prosecutor could have charged under section 208, the subjects were convicted under other criminal statutes as noted above. Furthermore, OIG may seek other remedies related to Social Security fraud, such as CMPs or civil actions.

In total, OIG efforts during FY 2015 resulted in over \$224 million in investigative accomplishments, including over \$63 million (this figure includes the \$8.2 million in restitution stated above) in recoveries, restitution, fines, settlements, and judgments; and over \$167 million in projected savings from investigations resulting in the suspension or termination of benefits. The timeframe for savings are based on the type of investigation and whether the claim was in pay at the time of the investigation. We use a calculation of the monthly benefit amount or amount of reduction in benefits multiplied by 60 months for Title II and Title XVI program savings. For Title II and Title XVI initial claim disability cases, we use a set figure based on the program affected. For Title II and Title XVI in-pay disability cases, we use a calculation of the monthly benefit amount multiplied by 61.6.

Since the determination as to whether to proceed with a criminal prosecution based upon an OIG investigation rests with the appropriate United States Attorney's Office, we cannot quantify how many cases will be prosecuted and their resulting restitution.

In FY 2016, we will begin discussing the feasibility of capturing this information in the future. As noted previously, since all fraud is improper, but not all improper payments are fraud, it is important that we have a clearly defined set of definitions and metrics.

The Department of Justice (DOJ) is the Federal agency responsible for prosecuting defendants who have violated Federal law. However, due in part to a lack of prosecutorial resources, DOJ declines many cases for prosecution. For more than a decade, OGC has worked with OIG to develop the Fraud Prosecution Project. The goal of this initiative is to increase the number of prosecutions for crimes involving Social Security matters. To support this project, OGC has provided attorneys to serve as Special Assistant United States Attorneys (fraud prosecutors) in many of the Federal districts where we have regional offices and at our Headquarters in Baltimore, MD.

By early 2015, OGC hired fraud prosecutors in the new locations reflected in the chart below. Seattle, Puerto Rico, and Chicago were existing locations where we had to backfill. Kansas City was a part-time position that we converted to full-time and hired accordingly. With previously existing sites, OGC now has fraud prosecutors in 24 locations.

Location	Start Date / Entry on Duty
Alexandria, Virginia	Internal Hire – No Start Date Necessary
Chicago, Illinois	Internal Hire – No Start Date Necessary
Concord, New Hampshire	Internal Hire – No Start Date Necessary
San Juan, Puerto Rico	09/08/14
Boise, Idaho	09/21/14
Kansas City, Kansas	09/21/14
Los Angeles, California	09/21/14
Richmond, Virginia	09/21/14
Salt Lake City, Utah	09/21/14
San Antonio, Texas	09/21/14
San Diego, California	09/26/14
Detroit, Michigan	09/29/14
Baltimore, Maryland	10/27/14
Seattle, Washington	10/27/14
Albany, New York	11/03/14
Cleveland, Ohio	01/26/15

By early 2015, OGC accomplished all the hires provided. This effort doubled the number of fraud attorneys that were available at the start of 2014. With the new locations and new attorneys on board, OGC attorneys secured 171 convictions in FY 2015 resulting in total restitution of \$16,469,595. The estimated FY 2015 costs of these 25 Special Assistant United States Attorneys prosecuting fraud was \$3,953,000, which includes the salary and benefit costs of these attorneys. As the attorneys gain experience, the return on this investment will increase.

#### Program Integrity Expenditures and Numbers

##### ***Periodic Continuing Disability Reviews***

The American public expects and deserves for us to be outstanding stewards of the Social Security Trust Funds and general revenues that finance our programs – and as such, we are committed to ensuring that program rules and eligibility standards are fully enforced. One of our

most important program integrity tools are CDRs, which are periodic reevaluations to determine if beneficiaries still qualify to receive benefits. We conduct periodic CDRs to ensure that only those beneficiaries who remain disabled, based on our strict standard of disability, continue to receive monthly benefits. Almost all medical CDRs are scheduled based on a beneficiary's likelihood of experiencing medical improvement rather than on suspicion or evidence of fraud. The primary purpose of a CDR is to determine if a beneficiary continues to be entitled to benefits because of his or her medical condition; a finding of medical improvement does not mean that the beneficiary committed fraud. However, our ability to perform additional CDRs may allow us to detect potentially fraudulent or suspicious activities. It should also be noted that there are no improper payments associated with the medical CDR process. Benefits for individuals who have medically improved are only improper if the agency fails to suspend payment after the CDR appeals process has been fully completed, or the individual had failed to cooperate with the CDR.

For case reviews that we initiate centrally when a medical review diary matures, we conduct periodic CDRs using one of two methods. We send some cases to the DDS for a full medical review; we complete others using the mailer process. We decide whether to initiate a full medical review or send a mailer after profiling all cases to identify the likelihood of medical improvement. We send cases with a higher likelihood of medical improvement to DDSs for full medical reviews. For those cases with a lower likelihood of medical improvement, we send mailers to obtain more information from the beneficiaries, which we evaluate to determine if there is any indication of medical improvement. If we find an indication of medical improvement, we send the case to a DDS for a full medical review. Otherwise, we set a new medical review diary and schedule the case for a future CDR. Each year, we refresh the case priority selections based on the results of a predictive statistical scoring model.

We conduct some CDRs outside the centralized process based on events such as voluntary or third party reports of medical improvement. We always send these CDRs to the DDSs for a full medical review. In addition, there is a subset of cases where the medical review diary matures, but we curtail further development for technical reasons, such as the suspension or termination of benefits for non-medical reasons. Our current estimates indicate that medical CDRs conducted in FY 2017 will yield a return of investment (ROI) of about \$8 on average in net Federal program savings over 10 years per \$1 budgeted for dedicated program integrity funding, including Old-Age, Survivors, and Disability Insurance (OASDI), SSI, Medicare and Medicaid program effects.

### ***Work-Related Continuing Disability Reviews***

We use the term “substantial gainful activity” (SGA) to describe a level of work activity and earnings. When a beneficiary is receiving disabled worker benefits from the SSDI program, we review his or her case to determine if the beneficiary is performing SGA, and if eligibility for benefits should continue. We commonly refer to this process as a “work CDR.”

We learn about work activity through two primary ways. Some work CDRs are triggered when beneficiaries report their work or earnings as required by law. SSDI beneficiaries must report any changes in work activity, and we must determine whether such work constitutes SGA. We

are planning to expand the options for a SSDI beneficiary to report work activity by creating an internet reporting process. Currently SSDI beneficiaries generally report work activity through the local field office or by calling the national 800 number. An internet reporting application will also assist us by conveniently loading information about work activity directly into our work CDR systems and generating a receipt to the beneficiary. Providing a more convenient method for beneficiaries to report work will also reduce the burden on SSA staff to take reports and manually enter the data.

Other work CDRs are triggered through the Continuing Disability Review Enforcement Operation (CDREO). The CDREO is an automated process that identifies work activity by matching earnings reported to the Internal Revenue Service (IRS) and posted to our Master Earnings File with the information in our other records. We are working on a business process to incorporate more earnings data sources into the CDREO process. The recent Bipartisan Budget Act provides us the opportunity to contract with third party payroll providers to obtain payroll data. Third party payroll data is timelier than IRS data, and will allow us to learn about unreported work activity more quickly.

When we learn of work activity, we analyze the work activity to determine if we must investigate. After we review the earnings, we may screen out many work reports and CDREO alerts because they do not meet the requirements for a work CDR. In addition, many CDREO alerts may identify payments that are not earnings from work activity (e.g., sick pay or long-term disability benefits); these payments also do not require a work CDR.

Please see the below table for actual CDR workload volumes for FY 2015:

<b>FY 2015 Actual Volumes</b>	<b>Title II</b>	<b>Title XVI</b>	<b>TOTAL</b>
Full Medical CDRs	301,317	497,696	799,013
CDR Mailers	983,332	189,467	1,172,799
Work-Related CDRs	247,772	-	247,772

In FY 2015, we spent \$560 million<sup>4</sup> on Periodic CDRs, which includes the cost of CDR Mailers. We spent an additional \$215 million<sup>5</sup> on Work-Related CDRs.

Please see the below table for enacted CDR workload volumes for FY 2016:

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<sup>4</sup> Includes \$278 million in costs allocated to DI, retirement and survivors insurance (RSI), and hospital insurance/supplementary medical insurance (HI/SMI) and \$282 million in costs allocated to SSI

<sup>5</sup> Includes about \$105 million in costs allocated to DI, \$61 million in costs allocated to RSI, and \$49 million in costs allocated to HI/SMI

<b>FY 2016 Enacted Volumes</b>	<b>Title II</b>	<b>Title XVI</b>	<b>TOTAL</b>
Full Medical CDRs <sup>i</sup>	500,000	350,000	850,000
CDR Mailers	800,000	300,000	1,100,000
Work-Related CDRs (YTD) <sup>ii</sup>	55,569	-	55,569
<i>i/ Volumes above are based upon the funding provided in our FY 2016 appropriation (PL-114-113).  The FY 2016 workload estimates are 350,000 Title II CDRs and 500,000 Title XVI CDRs.  We have the authority to reallocate funds based upon Section 201 (g) of the Social Security Act.  ii/ We do not develop official volume projections for Work-Related CDRs, therefore we  have included our most recent FY 2016 YTD figures, which are through December.</i>			

In FY 2016, we anticipate spending a total of \$825 million<sup>6</sup> on Full Medical CDRs, CDR Mailers, and Work-Related CDRs. Since Work-Related CDRs are not an agency-controlled workload, we do not develop official volume projections for that workload in a given fiscal year. Historically, work CDR volumes are consistently 250,000 – 300,000 annually. However, in formulating the budget, we fully incorporated the projected costs of Work-Related CDRs into the total projected costs for CDRs.

### ***Redeterminations***

Another important program integrity tool is SSI redeterminations, which are periodic reviews of non-medical eligibility factors such as income and resources.

Changes in beneficiaries' living arrangements or the amount of their income and resources can affect both their eligibility for SSI and the amount of their payments. To ensure the accuracy of SSI payments, we conduct redeterminations. To select redeterminations, we use a predictive statistical model, which we implement each year to prioritize redeterminations to focus on reviews most likely to result in the correction of improper payments. Redeterminations are a key activity in ensuring the integrity of the SSI program and maintaining and improving payment accuracy. Our estimates indicate that non-medical redeterminations conducted in 2017 will yield a ROI of about \$3 on average of net Federal program savings over 10 years per \$1 budgeted for dedicated program integrity funding, including SSI and Medicaid program effects.

Effective October 2008, we ceased conducting redeterminations via mail, as we determined they were not cost effective.

In FY 2015, we spent \$630 million to conduct 2,266,993 redeterminations pursuant to section 1611(c).

In FY 2016, we plan to spend \$701 million to conduct 2,522,000 redeterminations pursuant to section 1611(c).

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<sup>6</sup> Includes \$496 million in costs allocated to DI, RSI, and HI/SMI and \$329 million in costs allocated to SSI

The Number of Cases of Fraud Identified for which Benefits were Terminated as a result of Medical CDRs, Work-Related CDRs, and Redeterminations, and the Amount of Resulting Savings for Each Such Type of Review or Redetermination

For 2015, OIG reported overall savings of \$475 million from all investigations resulting in the suspension or termination of benefits. This figure is reported in its Semiannual Report to Congress. However, OIG does not track the number of instances of fraud where benefits were terminated because of a medical CDR, work-related CDR, or redetermination. Neither our fraud referral form nor the OIG case management system captures this specific event. Therefore, we cannot provide FY 2015 volumes or resulting savings.

We plan to work with the OIG to assess our policies and procedures to determine if the tracking of such data is feasible and what requisite systems modifications would be needed.

The Number of Work-Related CDRs in which a Beneficiary Improperly Reported Earnings Derived from Services for More Than Three Consecutive Months, and the Amount of Resulting Savings

Because SSDI beneficiaries are not required to report monthly, the only way an SSDI beneficiary can “improperly” report earnings is to not report at all when there is a change in work activity. We use the CDREO process to learn of unreported work activity. As mentioned earlier, we plan to expand options for beneficiaries to report earnings electronically and pursue new sources of earnings data for the enforcement process.

**Other Reports of Interest**

We have provided below additional agency reports of interest.

- Fiscal Year 2015 Agency Financial Report  
(<https://www.socialsecurity.gov/finance/>)
- Annual Performance Report 2014 - 2016  
(<https://www.socialsecurity.gov/agency/performance/>)





## **Fraud and Similar Fault in Disability Claims (Policy Interpretation) SSR**

### **PURPOSE:**

On 3/14/2016, we published a new Social Security Ruling (SSR), **SSR 16-1p, on Fraud and Similar Fault (FSF) Redeterminations in Disability Claims**. The SSR explains the process for SSA and State agency adjudicators to make fraud and similar fault redeterminations on Title II and Title XVI disability claims when there is reason to believe that FSF is involved at the time of application.

We also revised **SSR 00-2p**, and in its place, published **SSR 16-2p, Titles II and XVI: Evaluation of Claims Involving the Issue of “Similar Fault” in the Providing of Evidence**, to maintain consistency with definitions in the new SSR. While we revised SSR 00-2p, its purpose remains to explain the rules that govern the evaluation and adjudication of claims when there is reason to believe that “similar fault” was involved in the providing of evidence in support of the claim. The revision of SSR 00-2p pertains to similar fault in claims pending final determination and pending redetermination.

### **BACKGROUND:**

Enacted in 1994, sections 205(u) and 1631(e) (7) of the Act direct us how to treat claims involving evidence submitted through fraud or similar fault. In 2000, we issued SSR 00-2p “to explain the rules that govern the evaluation and adjudication of claims when there is reason to believe that similar fault was involved in the providing of evidence in support of the claim.”

Fraudulent activities since publication of SSR 00-2p reveal vulnerabilities in SSA’s disability program and support the initiative to develop this new SSR. To strengthen SSA’s disability program, this new SSR will explain the process for SSA and State agency adjudicators to make fraud and similar fault redeterminations on Title II and Title XVI disability claims when there is reason to believe that FSF is involved at the time of application. The new SSR will build on, rather than replace or limit, existing standards and criteria for development and evaluation of disability claims.

### **HIGHLIGHTS OF THE SSRs:**

- Explains how SSA will make FSF redeterminations for disability claims involving FSF at the time of application
- Establishes SSA’s definition of fraud that is binding on all SSA components and agents
- Clarifies definition of knowingly and preponderance of the evidence
- Clarifies differences between fraud and similar fault
- Clarifies who we may find committed fraud and similar fault
- Addresses appeal rights and subsequent applications
- Provides instructions for disregarding evidence when there is reason to believe that fraud similar fault was involved in providing that evidence

### **REFERENCES:**

[SSR 16-2p, Evaluation of Claims Involving Similar Fault in the Providing of Evidence](#)



**First 100 Days Calendar**  
**Major Reports, Events, Decisions, and Regulations**  
**January - April 2017**

	Item #	Name of Item	Type	Lead	SSA Due Date	Description
<b>January</b>	<b>JANUARY</b>					
	1	Cost-of-Living Adjustment (COLA)	Event	OCACT	1/1/2017	The 0.3 percent COLA will begin with benefits payable to more than 60 million Social Security beneficiaries in January 2017. Increased payments to more than 8 million Supplemental Security (SSI) recipients will also begin with their January payment. Some other adjustments that take effect in January include an increase in the earnings limits for beneficiaries who receive retirement benefits and an increase in the maximum earnings subject to Social Security taxes. The development of the average wage index determined the increase in primary insurance amount benefit factors and the taxable maximum.
	2	Annual Report to Congress on Overpayment Waivers - Required by the Bi-Partisan Budget Act of 2015 (BBA) Section 845	Report	DCBFQM/ OFPO	1/1/2017	BBA of 2015 was enacted November 2, 2015; H.R. 1314; Public Law No. 114-74. Section 845(c) requires us, no later than January 1 of each calendar year, to submit an annual report that must contain: <ul style="list-style-type: none"> <li>• The number and total value of overpayments we recovered or scheduled to be recovered during the previous fiscal year for the Old-Age, Survivors, and Disability Insurance (OASDI) and Supplemental Security Income (SSI) programs, including the terms and conditions of repayment of such overpayments; and</li> <li>• The number and total value of OASDI and SSI overpayments we waived during the previous fiscal year.</li> </ul> The Commissioner signs the report and releases it to Congress (Committee on Ways and Means of the House of Representatives, and Committee on Finance of the Senate).
	3	ODAR Monthly State of Services Report	Report	ODAR	1/5/2017	The monthly ODAR State of Services (SOS) report includes management information and data about workloads, issues, successes, and progress on our goals. SOS also includes ongoing initiatives, such as updates to our CARES plan to reduce the hearings pending and wait time for a hearing.
	4	SSA/AFGE Labor-Management Forum	Event	DCHR/OLMER	1/11/2017	Monthly meeting between the AFGE General Committee and SSA leadership from DCHR, DCBFQM, DCDAR, and DCO, in support of Executive Order 13522 – <i>Creating Labor-Management Forums to Improve Delivery of Government Services</i> .
	5	Updating the Listing of Impairments	Regulation	ORDP	1/17/2017	We have published revisions to the criteria for the Listing of Impairments (Listings) evaluating mental disorders and HIV infection. These revisions reflect our program experience and advances in medical knowledge that have occurred since we last updated the Listings.
	6	National Instant Criminal Background Check System (NICS)	Regulation	ORDP	1/18/2017	We issued rules to implement provisions of NICS Improvement Amendments Act of 2007 that require Federal agencies to provide relevant records to the Attorney General for inclusion in the National Instant Criminal Background Check System. This rule is effective January 18, 2017 with a compliance date of December 19, 2017
	7	QuickPay Report	Report	OFPO	1/20/2017	OMB directive M-16-07, Reporting of Accelerated Payment to Small Business Subcontractors, requires agencies to report quarterly on the progress of accelerating payments to small business subcontractors. OMB M-12-16, issued on July 11, 2012, was effective for one year after its release. On July 11, 2013, OMB issued M-13-15, which extended the original policy by one year. On July 10, 2014, OMB issued M-14-10 extending the policy to December 31, 2016 and indicating that agencies should continue to provide six-month reports. We are anticipating OMB will extend the policy again. The Associate Commissioner for Financial Policy and Operations signs the report, which is then uploaded to MAX.gov.
	8	Operations Executive Meeting	Event	DCO	01/23/2017 - 01/27/2017	This meeting gathers the regional and headquarter Operations executives to coordinate all aspects of service delivery, including strategic direction, workload planning, staffing/budgeting, policy implementation, fraud prevention etc. in order to ensure consistent and accurate service across our front-line employees in our Field Offices, Tele-Service Centers, and Program Service Centers as well as in all of our State Disability Determination Services Offices.

**First 100 Days Calendar**  
**Major Reports, Events, Decisions, and Regulations**  
**January - April 2017**

	Item #	Name of Item	Type	Lead	SSA Due Date	Description
January	9	Quarterly Report on the Status of Balances of Appropriations	Report	DCBFQM/ OB/OFPO	1/30/2017	This report provides the status of balances of appropriations accounts and is required by Division H, Section 526 of the Consolidated Appropriations Act, 2016 (P.L. 114-113). DCBFQM signs it, and the Office of Budget (OB) releases it to Congress (House and Senate Appropriations Committees).
	10	Bipartisan Budget Act (BBA) - Promoting Opportunity Demonstration (POD)	Event	DCDRP	1/31/2017	The BBA instructed SSA to carry out the Promoting Opportunity Demonstration. We will award the contract to conduct the evaluation by January 1, 2017, and we will award the contract to implement POD shortly thereafter. Per the BBA, we will also notify the Committee on Ways and Means of the House of Representatives and the Committee on Finance of the Senate via a written report.
	11	EEOC-Management Directive 715	Report	DCHR	1/31/2017	In accordance with Section 717 of Title VII and Section 501 of the Rehabilitation Act, the Directive provides policy guidance and standards for establishing and maintaining effective affirmative programs of equal employment opportunity and effective affirmative action programs under Section 501 of the Rehabilitation Act. Agency Heads are responsible for ensuring compliance with this Directive and those implementing instructions issued by EEOC in accordance with existing law and authority.
	12	Annual Report on the Results of Periodic Representative Payee Site Reviews and Other Reviews	Report	DCRDP	1/31/2017	This is an annual report. According to the Social Security Protection Act of 2004, within 120 days after the end of each fiscal year, the Commissioner shall submit to the House Committee on Ways and Means and the Senate Committee on Finance a report on the results of reviews of our representative payees and all problems identified, including any corrective action taken or planned to correct such problems.
	13	Annual Report to Congress on Fraud and Improper Payments Required by the BBA Act of 2015 Section 845(a)	Report	DCBFQM/ OAFP	1/31/2017	Section 845(a) of the BBA of 2015 requires us, no later than January 31 of each fiscal year from 2016 through 2021, to submit an annual report on our activities to prevent fraud and improper payments to the Committee on Ways and Means of the House of Representatives and the Committee on Finance of the Senate. The Associate Commissioner for OB releases the final report to the Office of Management and Budget (OMB).
	14	Annual Report to Congress on Actual Expenses for Union Official Time	Report	DCBFQM/ OB	1/31/2017	This report is typically due the beginning of the second week in January. This annual report complies with requirements of the House Committee on Appropriations' Conference Committee Report 105-205. The report provides total agency costs for union representational activities. As required by annual appropriations acts, Treasury's general fund reimburses the Social Security trust funds, with interest, for the portion of expenses attributable to the trust funds. The final report is signed and released by the Commissioner, and copies are delivered to each member of the House Appropriations Committee, Subcommittee on Labor, Health and Human Services, Education and Related Agencies.
	15	Quarterly High-Dollar Report to the IG	Report	DCBFQM/ OFPO	1/31/2017	As part of Executive Order (EO) 13520, each agency head is required to submit a quarterly report on high-dollar overpayments identified by the agency. The report describes any actions the agency has taken, or plans to take, to recover improper payments as well as any actions the agency intends to take to prevent improper payments from occurring in the future. We submit an Accountable Official's Quarterly High-dollar Overpayment Report to the Office of the Inspector General (OIG), as required by EO 13520, <i>Reducing Improper Payments and Eliminating Waste in Federal Programs</i> . This report is due to the OIG by 30th of the month after each quarter ends.
	16	Conference Spending Report	Report	DCBFQM/ OFPO	1/31/2017	OMB required annual report which provides information on conference expenses in excess of \$100,000 during the fiscal year.
	17	BBA Provisions Report as Required by the BBA Act of 2015 - due to OMB monthly	Report	MULTIPLE	1/31/2017	This is a monthly report due to OMB providing the status of the projects required by the BBA Act of 2015.
	12/22/2016					

**First 100 Days Calendar**  
**Major Reports, Events, Decisions, and Regulations**  
**January - April 2017**

	Item #	Name of Item	Type	Lead	SSA Due Date	Description
January	18	Deadline for Employers to File Earnings Reports	Event	DCS	1/31/2017	The legislative Combined Annual Wage Reporting (CAWR) Program is a joint venture between IRS and SSA. The IRS is responsible for collecting taxes from employers for its tax administration purposes. SSA is responsible for collecting earnings reports from employers in order to fulfill our core mission to pay benefits to the public. Both agencies are obligated to share data. Recent legislation was passed that requires employers to file earnings reports by January 31 of the tax year, advancing the reporting deadline from March 31 to January 31. SSA is positioned to react to this recent legislation. SSA's Earnings Redesign initiative is a multi-year IT investment, managed by OMB Major IT Investment guidelines. One of the goals is to support earlier employer filing deadlines through redesigned software that allows the processing of increased volumes of up to 100 million W-2/W-2cs per week and 20 million W-2/W-2cs per day. In FY17, the Annual Wage Reporting (AWR) system will begin processing employer filings in December, rather than the traditional January timeframe. This will allow employers to start submitting reports earlier, in anticipation of the compressed filing deadline. The improvements that we have already implemented will allow us to handle the increased volume. In addition, in September, 2016, we released an online version of the AccuWage software which checks employer reports for errors. Employers will have the opportunity to correct errors before the filing deadline expires. We also seek to mitigate software performance risks by stress testing all of our system's components in anticipation of very large volumes of data coming to SSA within a short time period.
	19	End of the Affordable Care Act (ACA) open enrollment period	Event	DCS	1/31/2017	The open enrollment period for the Affordable Care Act (ACA) ends on 1/31/17. This will lift the moratorium on making any programmatic changes and relax the strict availability requirements for ACA, during the open enrollment timeframe.
	20	OIG Review of Supplemental Security Income Overpayments the Social Security Administration Cannot Prevent Because of the 1970 Goldberg-Kelly Supreme Court Decision	Report	DCBFQM/ALS	TBD	OIG's objective is to quantify the SSI overpayments SSA cannot prevent because of the Goldberg-Kelly provisions. Based on the 1970 U.S. Supreme Court decision in Goldberg v. Kelly, we are required to provide written advance notice to an SSI recipient of (1) a non-medical adverse action and (2) the right to request an initial appeal on that action within 10 days from receipt of the notice and continue receiving uninterrupted payments during the appeal. Any delays in taking this action have the potential to result in overpayments due to our inability to change a recipient's payment amount for the following month.
	21	OIG Review of Cross-referred Social Security Numbers	Report	DCBFQM/ALS	TBD	Generally, SSA assigns an individual one Social Security Number (SSN) to track his/her earnings and any benefits he/she may receive. If SSA assigns an individual more than one SSN, the agency generally cross-refers it electronically in its records. OIG's objective is to determine: (1) the validity of payments SSA issued simultaneously under multiple, cross-referred SSN; and (2) whether death information input on the Numident record of one SSN was also recorded on the Numident record of cross-referred SSN(s).
	22	FY 2017 Congressional/Budget Operating Plan	Report	DCBFQM/OB	TBD	This report provides the agency's operating plan including budgeted performance goals for the enacted funding level. It is due 30-45 days after enactment of our annual appropriation. The Commissioner signs it, and OB releases it to Congress and posts it to the Internet for the public.
	23	Small Business Procurement Scorecard Progress Report	Report	OSDBU/DCBFQM	1/30/2017	An agency's explanation and documentation to support that its current fiscal year agency plan was appropriately carried out in pursuit of the agency's small business goal achievement. The report information is normally sent the Small Business Administration (SBA) via email from our Chief of Staff. The agency certifies information in the Federal Procurement Data System - Next Generation (FPDS-NG) which goes to the Office of Federal Procurement Policy (OFPP) in OMB.
	24	The U.S.-Brazilian Social Security Agreement	Decision	DCRDP	TBD - currently with OMB for review	The United States and Brazil signed a new agreement on social security on June 30, 2015. Before the agreement may enter into force, however, the President must submit it to the U.S. Congress for a statutorily-required 60 session day review period. SSA's Office of the Chief Actuary projects that the agreement will exempt U.S. businesses and workers in Brazil from \$694 million in Brazilian social security taxes over the first 7 years it is effective.

**First 100 Days Calendar**  
**Major Reports, Events, Decisions, and Regulations**  
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	Item #	Name of Item	Type	Lead	SSA Due Date	Description
January	25	Final FY2018 Agency IT Investment Portfolio Summary and Major IT Investment Business Cases	Report	DCS/CIO	TBD (January/ February)	OMB requires agency IT budget and management information reporting in two parts, the Agency IT Portfolio Summary and supporting Major IT Business Cases. The Agency IT Portfolio Summary is a complete report of all IT resources within the agency. Major IT Business Cases describe the planning, budgeting, acquisition, and management of major IT Investments. <a href="https://www.whitehouse.gov/sites/default/files/omb/assets/egov_docs/fy18_it_budget_guidance.pdf">https://www.whitehouse.gov/sites/default/files/omb/assets/egov_docs/fy18_it_budget_guidance.pdf</a>
	26	DCPS Implementation Strategy	Decision	DCO	Jan –April 2017	This is SSA's initiative to develop a common case processing system for all DDSs that we expect will simplify systems support and maintenance, improve the speed and quality of the disability process. The Agency is currently building an in house system using Agile development. We need to make decisions regarding the DCPS implementation strategy, i.e. next states to rollout DCPS.
	27	SSA/OPM Bi-weekly Meeting	Meeting	ODAR	Bi-Weekly Jan-April 2017	SSA and OPM meet bi-weekly to discuss potential ALJ selective placement factors.
	28	Expansion of CDI Units	Decision	DCO	Jan – April 2017	Once we receive our budget, we need to determine expansion of CDI units.
FEBRUARY						
February	29	National Social Security & SSI Disability Advocate Meeting	Event	OCOMM	Jan/Feb	This is a quarterly meeting with a specific group of advocates to discuss issues and concerns with current policy. Topics include: <ul style="list-style-type: none"> <li>* Advocate Recommendations on Hearing Backlogs</li> <li>* Continuing Improper Disallowance Adjudications Among the State DDSs</li> <li>* Due Process Issues for Title II and Concurrent Beneficiaries at Payment Centers <ul style="list-style-type: none"> <li>1. Failure to acknowledge representatives</li> <li>2. Overpayment issues</li> <li>3. EXR issues</li> <li>4. Payment continuation</li> <li>5. Incarceration</li> </ul> </li> </ul>
	30	SSA/AFGE Labor-Management Forum	Event	DCHR/OLMER	2/1/2017	Monthly meeting between the AFGE General Committee and SSA leadership from DCHR, DCBFQM, DCDAR, and DCO, in support of Executive Order 13522 – <i>Creating Labor-Management Forums to Improve Delivery of Government Services</i> .
	31	SSA/AFGE Union-Management Meeting (UMM)	Event	DCHR/OLMER	2/7/2017	Bi-monthly meeting between AFGE and SSA, in accordance with Article 29 of the SSA/AFGE National Agreement.
	32	Agency Priority Goals - Quarterly Update	Report	OCSO	2/10/2017	Agency Priority Goals (APGs) are governed by the GPRA Modernization Act of 2010 and OMB Circular A-11. APGs are two year goals that are a part of our agency's Strategic Plan and are integrated into our Annual Performance Report. APG Leaders and Deputy Goals Leaders provide executive Leadership, guidance and direction in achieving our APGs and meet quarterly with the Performance Improvement Officer and Chief Operating Officer to discuss progress and actions needed. OCSO submits Quarterly updates to OMB via Performance.gov.
	33	SSA/IFPTE Labor-Management Forum	Event	DCHR/OLMER/ DCDAR	2/14/2017	Bi-monthly meeting between ODAR leadership and IFPTE, in support of Executive Order 13522 – <i>Creating Labor-Management Forums to Improve Delivery of Government Services</i> .
	34	SSA/Joint ODAR Labor-Management Forum	Event	DCHR/OLMER/ DCDAR	2/15/2017	Bi-monthly meeting between ODAR leadership and all three unions (AFGE, NTEU, and IFPTE), in support of Executive Order 13522 – <i>Creating Labor-Management Forums to Improve Delivery of Government Services</i> .
	35	Implementation of Jantz Settlement Agreement	Event	DCHR/ODAR	2/16/2017	The Jantz Settlement Agreement requires that, by 2/16/2017, the agency centralize certain aspects of the reasonable accommodation program. The agency is introducing the Employer of Choice for Employees with Disabilities initiative. This new initiative establishes and promotes best practices throughout SSA for employing individuals with disabilities.

12/22/2016



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	Item #	Name of Item	Type	Lead	SSA Due Date	Description
February	36	BBA Provisions Report as Required by the BBA Act of 2015 - due to OMB monthly	Report	MULTIPLE	2/28/2017	Section 845(c) of the Bipartisan Budget Act of 2015 requires us to implement several provisions in the BBA Act. This is a monthly Report due to OMB providing status of those projects.
	37	President's Budget Justification of Estimates for Appropriations Committees	Report	DCBFQM/ OB	TBD	The Congressional Justification presents and justifies the President's Budget for SSA and includes OCSO's Annual Performance Plan and Report. It is usually due the 1st Monday in February (NOTE: this is a transition year, and we have not received a budget timeline for FY 2017). The Commissioner signs it, and OB releases it to Congress (House and Senate Appropriations Committees) and posts it to the Internet for the public.
	38	Agency Security Classification Costs Estimates	Report	DCBFQM/ OSEP	TBD	EO 13526 requires executive branch agencies to report financial costs related to their security programs to National Archives and Records Administration's (NARA) Information Security Oversight Office. We submit these costs annually via the Agency Security Classification Costs Estimates report (Standard Form 716), which addresses a range of security categories, including personnel security, physical security, classification management, operations security, and training. The Information Sharing and Safeguarding Senior Official (OSEP Associate Commissioner) signs and releases this report to NARA.
	39	GAO Review on the Federal Government Efforts to Reduce the Use of Social Security Numbers	Report	DCBFQM/ ALS	TBD	At the request of the Chair of the House Committee on Oversight and Government Reform and the Chair of the Subcommittee on Social Security from the House of Committee on Ways and Means, GAO plans to review: (1) to what extent have agencies developed and executed plans to eliminate the use and display of SSNs; (2) what government-wide initiatives have been undertaken to assist agencies in eliminating their unnecessary use of SSNs and what have been their results; and (3) what remaining challenges have agencies identified to reducing the continued use of SSNs as personal identifiers.
	40	GAO Review of the Social Security Administration's Fraud Risk Management Efforts	Report	DCBFQM/ ALS	TBD	At the request of the Chairman of the Subcommittee on Social Security, Committee on Ways and Means, U.S. House of Representatives, GAO plans to review: (1) To what extent have we established an organizational culture and environment conducive to fraud risk management?; (2) To what extent have we conducted and documented a fraud risk assessment of our programs, at both the point of applications and post-entitlement?; (3) To what extent have we determined whether our existing control activities address our fraud risks and what, if any, opportunities we have to improve controls to address our fraud risks?; (4) What efforts, if any, do we have underway to monitor our fraud prevention and detection activities and use the results to continuously improve our activities?
	41	Small Business Procurement Agency Plan	Report	OSDBU/ DCBFQM	TBD	This plan is in conjunction with our agency's SBP Scorecard that we submit in January. This is an agency plan based on the final version of the Success Factors. The plan should address our agency's efforts for meeting the 7 success factors - no supporting documentation required. (SBA sends Anomaly Report to agencies.) Addresses the agency's efforts and action for the current fiscal year small business goal achievement.
	42	ODAR Monthly State of Services Report	Report	ODAR	TBD	The monthly ODAR State of Services (SOS) report includes management information and data about workloads, issues, successes, and progress on our goals. SOS also includes ongoing initiatives, such as updates to our CARES plan to reduce the hearings pending and wait time for a hearing.
	43	Small Business Agency Mentor-Protégé Report	Report	OSDBU/ DCBFQM	TBD	This is in conjunction with our agency's SBP Scorecard. Identifies whether an agency has a federal mentor-protégé program.

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	Item #	Name of Item	Type	Lead	SSA Due Date	Description
<b>March</b>	<b>MARCH</b>					
	44	Summary Performance and Financial Information Report for FY 2016	Report	OCSO	3/1/2017	The Summary of Performance and Financial Information is a high level summary of the performance and financial information included in the Agency Financial Report. Beginning with FY 2016, the summary is an optional report. If the agency opts to continue to produce the SPFI, the draft is due to OMB for review concurrent with the final draft APR and would be published concurrent with FY 2018 congressional budget justification.
	45	Security West and Falls Church Leases	Decisions	DCBFQM/OFLM	3/1/2017	There are pending lease issues that will need budget and staffing decisions in the first 100 days. The Security West lease prospectus is awaiting congressional action. The agency needs to finalize the Falls Church housing plan before proceeding. Both of these leases involve variables out of our control (e.g., General Services Administration (GSA) approvals, congressional action); therefore, the March 1 date is an estimate. Decisions could be needed sooner or later than March 1.
	46	Annual Performance Report - Final for FY 2016 - 2018	Report	OCSO	3/1/2017	The APR is a legislative requirement that details our Agency Performance plan for FY 2018, Revised Performance Plan for FY 2017 and agency Performance Report for FY 2016. The APR sets our agency priorities and planned activities for the next two years, the performance measures and targets we will use to evaluate progress and reports our performance results for the immediate past fiscal year. The APR is published with the FY 2018 congressional budget justifications on Performance.gov and the agency internet site. Normally the final draft is due to OMB in mid-January and the final report is published in February. This year the dates have been extended to the March 2017 - May 2017 timeframe. Exact due dates have not been provided yet.
	47	National Association of Disability Representatives (NADR) Conference	Event	ODAR	3/5/2017 - 3/8/2017	During the NADR conference, ODAR provides updates on ALJ hiring, IT innovations, rulings, regulatory changes and practice improvements to Professional Security Claimants Representatives (members and non-members). The collaboration is imperative to provide quality service to the public.
	48	SSA/AFGE Labor-Management Forum	Event	DCHR/OLMER	3/8/2017	Monthly meeting between the AFGE General Committee and SSA leadership from DCHR, DCBFQM, DCDAR, and DCO, in support of Executive Order 13522 – <i>Creating Labor-Management Forums to Improve Delivery of Government Services</i> .
	49	Managing Government Records Program and Reporting	Report	DCS	3/17/2017	OMB/NARA M-12-18 Requires each agency to designate an official responsible for overseeing records management program. We are required to submit an annual report to NARA.
	50	Evaluation of Medical Evidence	Regulation	ORDP	3/27/2017	We are proposing a number of revisions to our medical source and opinion regulations that will redefine categories of medical evidence and make it easier to understand and use our rules of evidence. The effective date is tentative.
	51	Trustees Report Release	Report	OCACT	3/28/2017	The Social Security Act established the Board of Trustees to oversee the financial operations of the OASI and DI Trust Funds. The Board is composed of six members. Four members serve by virtue of their positions in the Federal Government: the Secretary of the Treasury, who is the Managing Trustee; the Secretary of Labor; the Secretary of Health and Human Services; and the Commissioner of Social Security. The President appoints and the Senate confirms the other two members to serve as public representatives. These two positions are currently vacant. The Deputy Commissioner of the Social Security Administration serves as Secretary of the Board. The Social Security Act requires that the Board, among other duties, report annually to the Congress on the actuarial status and financial operations of the OASI and DI Trust Funds. The 2017 report is the 77th such report.



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	Item #	Name of Item	Type	Lead	SSA Due Date	Description
March	52	No FEAR Act Report	Report	DCHR	3/29/2017	On May 15, 2002, Congress enacted the "Notification and Federal Employee Antidiscrimination and Retaliation Act of 2002," which is now known as the No FEAR Act. One purpose of the Act is to "require that Federal agencies be accountable for violations of antidiscrimination and whistleblower protection laws. DCHR provides a briefing to the Acting Commissioner or Commissioner. DCHR will sign/release this report to the Equal Employment Opportunity Commission (EEOC) . The annual due date is 180 days after fiscal year.
	53	Draft FY 2018-2022 Real Property Efficiency Plan to OMB	Report	DCBFQM/ OFLM	3/31/2017	The draft report is due to OMB, with a copy to the General Services Administration (GSA), approximately 90 days after GSA submits the Federal Real Property Profile, which is typically by December 31. This report is required by OMB and documents the agency's annual square foot reduction targets; notes initiatives we undertook to achieve set targets; and provides information on future actions we will take to continue to meet the Reduce the Footprint mandate. The report is signed by the Commissioner; the Chief Financial Officer; and the agency's Senior Real Property Official. The Commissioner releases the report to the Controller for OMB.
	54	BBA Provisions Report as Required by the BBA Act of 2015 - due to OMB monthly	Report	MULTIPLE	3/31/2017	Section 845(c) of the Bipartisan Budget Act of 2015 requires us to implement several provisions in the BBA Act. This is a monthly Report due to OMB providing status of those projects.
	55	Plain Writing Compliance Report	Report	DCCOMM	3/31/2017	As a part of the Plain Writing Act of 2010, we are required to submit an annual compliance report. The report highlights our plain writing efforts, our supporting activities, and the improvements in our written communications. The report is posted in the plain writing section of our webpage and submitted to the Center for Plain Language for grading.
	56	Draft FY 2018-2022 Real Property Efficiency Plan to OMB	Report	DCBFQM/ OFLM	3/31/2017	The draft report is due to OMB, with a copy to the General Services Administration (GSA), approximately 90 days after GSA submits the Federal Real Property Profile, which is typically by December 31. This report is required by OMB and documents the agency's annual square foot reduction targets; notes initiatives we undertook to achieve set targets; and provides information on future actions we will take to continue to meet the Reduce the Footprint mandate. The report is signed by the Commissioner; the Chief Financial Officer; and the agency's Senior Real Property Official. The Commissioner releases the report to the Controller for OMB.
	57	Federal Information Security Management (FISMA)	Report	DCS	3/31/2017	The Federal Information Security Management Act (FISMA) is United States legislation that defines a comprehensive framework to protect government information, operations and assets against natural or man-made threats. FISMA was signed into law part of the Electronic Government Act of 2002.
	58	Non-Work Report	Report	DCLCA	TBD	The report is due no later than 3 months after the end of the fiscal year. However, because we maintain earnings records on a calendar year basis, we report on a calendar, rather than fiscal year basis. Accordingly, we issue the report no later than 3 months after the close of the calendar year.
	59	FY 2017 Budget Scrub	Event/ Decisions	DCBFQM/ OB	TBD	In February, OB will perform its first budget scrub exercise. Scrubs typically involve re-estimating the agency's annual payroll costs based on the most recent actual payroll data available as well as communicating with component budget staffs for their latest funding needs or returns. DCBFQM will then meet with the Commissioner in early March for necessary decisions on any available resources.
	60	National Counterterrorism Budget Report Data Call	Report	DCBFQM/ OSEP	TBD	This is an annual report required by the National Counterterrorism Center (NCTC). This report provides information regarding the agency's counterterrorism initiatives and helps the NCTC keep track of Federal department and agency resources committed in support of the National Strategy for Counterterrorism. The Office of the Inspector General signs and releases the report to the National Counterterrorism Center.

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	Item #	Name of Item	Type	Lead	SSA Due Date	Description
March	61	OIG Review of Manually Issued Old-Age Survivors and Disability Insurance Underpayments Less Than \$6,000	Report	DCBFQM/ ALS	TBD	OIG's objective is to determine whether we accurately issued manual OASDI underpayments less than \$6,000. They also plan to review a sample of OASDI underpayments less than \$6,000 issued manually during calendar years 2014 and 2015. In addition, OIG will review all beneficiaries in its population issued five or more underpayments. Specifically, OIG plans to determine whether the underpayments were accurate and supported.
	62	Small Business Agency Corrective Actions Reports	Report	OSDBU/ DCBFQM	TBD	This is in conjunction with our agency's SBP Scorecard that we submit in January. This is a corrective action plan based on SBA's review. Reports on whether an agency achieved the prime and subcontract goals established for the agency. Includes justification for a failure to achieve such goals.
	63	Spring Unified Agenda	Report	DCLCA	TBD	The Regulatory Flexibility Act requires that agencies publish semiannual regulatory agendas in the Federal Register describing regulatory actions they are developing that may have a significant economic impact on a substantial number of small entities (5 U.S.C. 602). The spring Unified Agenda publication appears in the Federal Register and consists of agency regulatory flexibility agendas. Agency regulatory flexibility agendas contain only those Agenda entries for rules that are likely to have a significant economic impact on a substantial number of small entities and entries that have been selected for periodic review under section 610 of the Regulatory Flexibility Act. Due to OMB bi-annually March and Sept. Exact due date TBD by OMB. The fall plan (Sept) includes a regulatory agenda.
	64	CFCAA - Conference Report to OIG	Report	DCBFQM/ OFPO	TBD	The Consolidated Appropriations Act, 2016 requires us to provide the IG with an annual report compiling all agency-sponsored conferences with costs greater than \$100,000. Note that most of the information is the same as the "regular" conference report we prepare and release to the internet in January of every year. The Commissioner releases the report to the Inspector General.
	65	National Disability Forum	Event	OCOMM/ORDP	TBD	The Disability Forum is an open forum of Social Security that gives all interested stakeholders an opportunity to share their unique insights on topics of particular interest to SSA early in the process and directly with policy makers. Further, it provides an opportunity for stakeholders to hear from one another. Open to anyone interested, the Disability Forum is not intended to be a means for reaching agreement on an issue, and SSA's participation is only for the purpose of gaining insight through listening.  This inclusive and collaborative approach helps us develop responsive, effective, and efficient policies in order to empower individuals with a disability, minimize their financial hardship, and ensure proper use of Disability Trust funds. The activities under the Disability Forum supplement, but do not replace, the rule-making process followed by SSA under the Administrative Procedure Act.
	66	ODAR Monthly State of Services Report	Report	ODAR	TBD	The monthly ODAR State of Services (SOS) report includes management information and data about workloads, issues, successes, and progress on our goals. SOS also includes ongoing initiatives, such as updates to our CARES plan to reduce the hearings pending and wait time for a hearing.
	67	Multi-Factor Authentication	Event	DCS	TBD (March-April)	President Obama signed an executive order on cybersecurity on October 17, 2014. The order focuses on protecting citizens from identity theft and directs federal agencies to provide more secure authentication for their online applications. Specifically, the order requires multi-factor authentication for any agency application that discloses personal information. Citizens accessing MySSA will enter the username and password, but then be required to enter a one-time passcode. This numeric code will be sent to the enrolled mobile phone number or email.

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	Item #	Name of Item	Type	Lead	SSA Due Date	Description
<b>April</b>	<b>APRIL</b>					
	68	Pre-Effectuation Review (PER) Report	Report	DCLCA	4/1/2017	Per the Social Security Act, we are required to report to the House Committee on Ways and Means and the Senate Committee on Finance, by April 1, on the pre-effectuation reviews conducted during the previous fiscal year. However, the required data is not available for analysis until later in the year. Although not required, we also report the results of SSI-only reviews conducted during the year.
	69	Medicare Outreach Letters (SSA-L447 & L448)	Report	DCRDP	04/04/2017	Under Section 1144 of the Social Security Act, the Commissioner of Social Security shall conduct outreach efforts to identify individuals entitled to benefits under the Medicare program who may be eligible for medical assistance. Our spring Outreach letters include the SSA - L447 and SSA - L 448. The SSA L447 is mailed to Medicare beneficiaries whose income appears to be less than 135 percent of poverty level and who have low-income prescription drug coverage subsidy (LIS), but do not participate in the Medicare Savings Program (MSP). The SSA-L488 is mailed to Medicare beneficiaries whose income is low enough for both LIS and MSP, but they have neither.
	70	SSA/AFGE Union-Management Meeting (UMM)	Event	DCHR/OLMER	4/4/2017	Bi-monthly meeting between AFGE and SSA, in accordance with Article 29 of the SSA/AFGE National Agreement.
	71	SSA/AFGE Labor-Management Forum	Event	DCHR/OLMER	4/12/2017	Monthly meeting between the AFGE General Committee and SSA leadership from DCHR, DCBFQM, DCDAR, and DCO, in support of Executive Order 13522 – <i>Creating Labor-Management Forums to Improve Delivery of Government Services</i> .
	72	Small Business Agency Scorecard Comments	Report	OSDBU/DCBFQM	4/12/2017	This is in conjunction with our agency's SBP Scorecard that we submit in January. This is an opportunity for agencies to submit a comment (eventually made public) after SBA notifies the agency of its scorecard grade.
	73	Expedited Reinstatement	Regulation	ORDP	4/17/2017	We simplified our policies for evaluating unsuccessful work attempts and made it easier for previously entitled beneficiaries to apply for expedited reinstatement. We expect these changes will result in simplified case processing and faster and better determinations and decisions. The Unsuccessful Work Attempts regulation was effective November 16, 2016, and the Expedited Reinstatement regulation will be effective on April 17, 2017.
	74	SSA/IFPTE Labor-Management Forum	Event	DCHR/OLMER/DCDAR	4/18/2017	Bi-monthly meeting between ODAR leadership and IFPTE, in support of Executive Order 13522 – <i>Creating Labor-Management Forums to Improve Delivery of Government Services</i> .
	75	SSA/Joint ODAR Labor-Management Forum	Event	DCHR/OLMER/DCDAR	4/19/2017	Bi-monthly meeting between ODAR leadership and all three unions (AFGE, NTEU, and IFPTE), in support of Executive Order 13522 – <i>Creating Labor-Management Forums to Improve Delivery of Government Services</i> .
	76	Operations Executive Meeting	Event	DCO	04/24/2017-04/28/2017	This meeting gathers the regional and headquarter Operations executives to coordinate all aspects of service delivery, including strategic direction, workload planning, staffing/budgeting, policy implementation, fraud prevention etc. in order to ensure consistent and accurate service across our front-line employees in our Field Offices, Tele-Service Centers, and Program Service Centers as well as in all of our State Disability Determination Services Offices.
	77	BBA Provisions Report as Required by the BBA Act of 2015 - due to OMB monthly	Report	MULTIPLE	4/28/2017	Section 845(c) of the Bipartisan Budget Act of 2015 requires us to implement several provisions in the BBA Act. This is a monthly Report due to OMB providing status of those projects.
	78	Quarterly High-Dollar Report to the IG	Report	DCBFQM/OFPO	4/28/2017	As part of Executive Order 13520, each agency head is required to submit a quarterly report on high-dollar overpayments identified by the agency. The report describes any actions the agency has taken, or plans to take, to recover improper payments as well as any actions the agency intends to take to prevent improper payments from occurring in the future. We submit an Accountable Official's Quarterly High-dollar Overpayment Report to the Office of the Inspector General (OIG), as required by Executive Order 13520, Reducing Improper Payments and Eliminating Waste in Federal Programs. This report is due to the OIG by 30th of the month after each quarter ends.

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	Item #	Name of Item	Type	Lead	SSA Due Date	Description
April	79	Quarterly Report on the Status of Balances of Appropriations	Report	DCBFQM/ OB	4/28/2017	This report provides the status of balances of appropriations accounts and is required by Division H, Section 526 of the Consolidated Appropriations Act, 2016 (P.L. 114-113). DCBFQM signs it, and OB releases it to Congress (House and Senate Appropriations Committees).
	80	GAO Review of SSA's Infrastructure and Service Delivery	Report	DCBFQM/ ALS	TBD	The Chair of the House Committee on Ways and Means, Subcommittee on Social Security asked GAO to review: (1) our efforts and plans to achieve financial efficiencies through reorganization of our physical infrastructure, and (2) our efforts to modernize service delivery through automated options, such as online services.
	81	GAO Review of SSA's Oversight of Administrative Law Judges	Report	DCBFQM/ ALS	TBD	The Chair of the House Committee on Ways and Means, Subcommittee on Social Security requested GAO to review: (1) To what extent do allowance rates vary among Administrative Law Judges and what factors, if any, are associated with this variation; and, (2) What actions has SSA taken to ameliorate oversight and ensure accurate and timely disability determinations at the hearings level.
	82	Information Collection Budget Report	Report	DCLCA	TBD	Annual report for Congress/OMB, which includes the total paperwork and information collection burden that federal government and individual agencies are placing on the public. Exact due date TBD by OMB.
	83	Minority Serving Institutions Performance Report	Report	DCHR	TBD	This Annual Performance Report on Executive Agency Actions to Assist Minority Serving Institutions (MSIs) pursuant to Executive Order (EO) 13515, EO 13532, EO 13555 and EO 13592. We submit our report to the Dept. of Education, usually in March.
	84	ODAR Monthly State of Services Report	Report	ODAR	TBD	The monthly ODAR State of Services (SOS) report includes management information and data about workloads, issues, successes, and progress on our goals. SOS also includes ongoing initiatives, such as updates to our CARES plan to reduce the hearings pending and wait time for a hearing.
	85	National Social Security Month	Event Designation	OCOMM	Month of April	Consider proclaiming April as "National Social Security Month." A presidential recognition would carry more weight and interest than if SSA self-recognized this. This would provide us with the opportunity to conduct marketing and outreach related to our programs and benefits. The benefits establishing a month dedicated to all things Social Security are: <ul style="list-style-type: none"> <li>• Amplifies importance of Social Security to the public</li> <li>• Provides national focus and visibility</li> <li>• Reinforces relevance of Social Security beyond retirement</li> <li>• Capitalizes on built-in focus of Financial Literacy Month and peak PSA distribution/awareness</li> <li>• Provides more lead time and flexibility for Public Affairs Specialists and OCOMM to create local and national outreach efforts that can: <ul style="list-style-type: none"> <li>– Be executed anytime during the month (not just during a designated time period)</li> <li>– Focus on anything Social Security e.g. retirement, survivors benefits, early career, mid-career, marriage, etc.</li> <li>– Be audience specific and leverage Audience Communications Packets</li> <li>– Leverage National Social Security Month for speaking engagements, exhibits, conferences, events at local venues e.g. housing units, libraries, assisted living facilities, etc.</li> </ul> </li> </ul>
	86	Strategic Objective Review	Report	OCSO	April 2017 (Internal); 5/16/17 to OMB	Per Circular A-11 Part 6 Section 270.9, the review should engage in long term strategy, annual planning and budget formulation. The Strategic Objective Review allows the SSA Commissioner, SSA Senior Executives, OMB and Congress to understand how the agency is performing from a strategic standpoint.
	87	ODAR Executive Meeting	Event	ODAR	Jan-April TBD	This meeting gathers ODAR executive leadership to discuss sensitive issues and management challenges that are outside the scope of our weekly regional video calls.

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	Item #	Name of Item	Type	Lead	SSA Due Date	Description
April		FY 2017 Congressional/Budget Operating Plan	Report	DCBFQM/ OB	TBD Contingent on Annual Appropriations	This report provides the agency's operating plan, including budgeted performance goals, for the enacted funding level. It is due 30-45 days after enactment of our annual appropriation--due dates vary, but the report normally is due at the end of January or beginning of February. The Commissioner signs it, and OB releases it to Congress and posts it to the Internet for the public. Note: We have not received a budget timeline for FY17, so the SSA due date is an estimate.
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**31. How would you rate how long it took Social Security to handle your application?****Would you say it was:** *(Select only one. Read rating scale ONLY.)*

AWARDS		Excludes "Don't remember"	DENIALS	
DCM (R = 340)	INITIAL DI (R = 706)		DCM (R = 281)	INITIAL DI (R = 398)
24% <sup>x</sup>	26%	Excellent	7% <sup>x</sup>	8%
34 <sup>s/x</sup>	23 <sup>s</sup>	Very good	16 <sup>x</sup>	13
28 <sup>x</sup>	31	Good	42 <sup>wx</sup>	33 <sup>w</sup>
86 <sup>s/x</sup>	80 <sup>s</sup>	<u>Excellent / Very good / Good</u>	65 <sup>wx</sup>	54 <sup>w</sup>
7 <sup>x</sup>	9	Fair	19 <sup>x</sup>	21
5 <sup>x</sup>	7	Poor	12 <sup>x</sup>	12
2	4	Very poor	4	13 <sup>w</sup>
14 <sup>s/x</sup>	20 <sup>s</sup>	<u>Fair / Poor / Very poor</u>	35 <sup>wx</sup>	46 <sup>w</sup>

<sup>s</sup> Statistically significant difference between DCM awards and current process awards<sup>w</sup> Statistically significant difference between DCM denials and current process denials<sup>x</sup> Statistically significant difference within DCM between awards and denials**Understanding Notices****32. Social Security sent you a notice to let you know the decision that was made on your application for disability benefits. How would you rate how clearly the notice explained the reason for Social Security's decision? Would you say the explanation was:** *(Select only one. Read rating scale ONLY.)*

AWARDS		Excludes "Don't remember"	DENIALS	
DCM (R = 321)	INITIAL DI (R = 737)		DCM (R = 279)	INITIAL DI (R = 417)
25% <sup>s/x</sup>	34% <sup>s</sup>	Excellent	7% <sup>x</sup>	7%
44 <sup>s/x</sup>	29 <sup>s</sup>	Very good	14 <sup>x</sup>	10
25 <sup>x</sup>	26	Good	43 <sup>wx</sup>	29 <sup>w</sup>
94 <sup>s/x</sup>	89 <sup>s</sup>	<u>Excellent / Very good / Good</u>	64 <sup>wx</sup>	46 <sup>w</sup>
3 <sup>x</sup>	4	Fair	13 <sup>x</sup>	17
2 <sup>x</sup>	5	Poor	16 <sup>x</sup>	20
1 <sup>x</sup>	2	Very poor	7 <sup>wx</sup>	17 <sup>w</sup>
6 <sup>s/x</sup>	11 <sup>s</sup>	<u>Fair / Poor / Very poor</u>	36 <sup>wx</sup>	54 <sup>w</sup>

<sup>s</sup> Statistically significant difference between DCM awards and current process awards<sup>w</sup> Statistically significant difference between DCM denials and current process denials<sup>x</sup> Statistically significant difference within DCM between awards and denials



- 33. The notice from Social Security also explained that you could file an appeal if you thought Social Security's decision was wrong. How clearly did the notice explain what to do if you disagreed with Social Security's decision? Would you say the explanation was: (Select only one. Read rating scale ONLY.)**

AWARDS			DENIALS	
DCM (R = 307)	INITIAL DI (R = 725)		DCM (R = 282)	INITIAL DI (R = 419)
25% <sup>x</sup>	31%	Excludes "Don't remember"	11% <sup>x</sup>	11%
46 <sup>s/x</sup>	31 <sup>s</sup>	Excellent	27 <sup>wx</sup>	19 <sup>w</sup>
27 <sup>x</sup>	33	Very good	45 <sup>x</sup>	38
98 <sup>s/x</sup>	95 <sup>s</sup>	Good	83 <sup>wx</sup>	68 <sup>w</sup>
1 <sup>x</sup>	3	Excellent /Very good/Good	8 <sup>wx</sup>	16 <sup>w</sup>
1 <sup>x</sup>	1	Fair	5 <sup>x</sup>	8
0	1	Poor	4 <sup>w</sup>	8 <sup>w</sup>
2 <sup>s/x</sup>	5 <sup>s</sup>	Very poor	17 <sup>wx</sup>	32 <sup>w</sup>
		Fair/Poor/Very poor		

<sup>s</sup> Statistically significant difference between DCM awards and current process awards

<sup>w</sup> Statistically significant difference between DCM denials and current process denials

<sup>x</sup> Statistically significant difference within DCM between awards and denials

*If respondent answered fair, poor, or very poor to question 32 and/or 33,  
answer question 34.*

*Otherwise, ~~skip~~ skip to question 35.*

- 34. I'm going to read a list of possible reasons why you may have rated the notices as fair, poor, or very poor. Please tell me when I read any reasons that explain why you gave that rating. (Read responses individually and select all that apply.)**

AWARDS			DENIALS	
DCM (R = 18)	INITIAL DI (R = 79)		DCM (R = 100)	INITIAL DI (R = 211)
19%	19%	Excludes "Don't remember"	11%	14%
16	11	The subject matter is hard to understand.	6	5
22	12	The words are too difficult.	14 <sup>w</sup>	6 <sup>w</sup>
22	20	The letters are not clearly written.	13	12
3	5	The letters give contradictory information (in the same or different letters).	6	5
0	3	The letters are too long.	1	1
5 <sup>x</sup>	22	The letters are written in English; I prefer another language.	36 <sup>wx</sup>	50 <sup>w</sup>
13	9	I disagree with the information or decisions in the letter.	13	9
		Other		

<sup>w</sup> Statistically significant difference between DCM denials and current process denials

<sup>x</sup> Statistically significant difference within DCM between awards and denials

## Overall Service

Now I would like to get your opinion of Social Security's overall service.

**35. Overall, how would you rate the service that Social Security has given you? Would you say the service was:** (Select only one. Read rating scale ONLY.)

AWARDS			DENIALS	
DCM (R = 342)	INITIAL DI (R = 740)	Excludes "Don't remember"	DCM (R = 285)	INITIAL DI (R = 418)
38% <sup>x</sup>	37%	Excellent	8% <sup>x</sup>	8%
41 <sup>s/x</sup>	32 <sup>s</sup>	Very good	17 <sup>x</sup>	14
15 <sup>s/x</sup>	22 <sup>s</sup>	Good	43 <sup>wx</sup>	33 <sup>w</sup>
94 <sup>x</sup>	91	Excellent /Very good/Good	68 <sup>wx</sup>	55 <sup>w</sup>
4 <sup>x</sup>	6	Fair	16 <sup>wx</sup>	23 <sup>w</sup>
1 <sup>x</sup>	2	Poor	9 <sup>x</sup>	10
1 <sup>x</sup>	1	Very poor	7 <sup>wx</sup>	12 <sup>w</sup>
6 <sup>x</sup>	9	Fair/Poor/Very poor	32 <sup>wx</sup>	45 <sup>w</sup>

<sup>s</sup> Statistically significant difference between DCM awards and current process awards

<sup>w</sup> Statistically significant difference between DCM denials and current process denials

<sup>x</sup> Statistically significant difference within DCM between awards and denials

**35a. Why did you say it was fair, poor, or very poor?**  
(Record a brief summary of the claimant's response).

*Took too long to process; disagree with decision; impersonal and unsympathetic treatment; medical condition not thoroughly reviewed; dissatisfied with oral and written explanations; whole process is too difficult.*

**36. Is there anything else you would like to say about Social Security's service?**  
(Select only one. Do NOT read responses.)

AWARDS		DENIALS
DCM (R = 342)	Excludes "Don't remember"	DCM (R = 294)
35%	Yes	31%
65	No	69

**36a. Record a brief summary of claimant's response.**

*Positive: Social Security is doing a good job; employees are courteous and helpful; process was smooth and efficient.*

*Negative: Processing time is too long; employees are not helpful or concerned; interview was rushed; was given misinformation; need clearer written explanations; hard to get through on the phone.*



**TAB B**

**TABLE FOR ESTIMATING  
APPROXIMATE SAMPLING VARIABILITY**

SAMPLE SIZE	PERCENTAGE ESTIMATE									
	5%	10%	15%	20%	25%	30%	35%	40%	45%	50%
50	±6.0	±8.3	±9.9	±11.1	±12.0	±12.7	±13.2	±13.6	±13.8	±13.9
100	4.3	5.9	7.0	7.8	8.5	9.0	9.3	9.6	9.8	9.8
150	3.5	4.8	5.7	6.4	6.9	7.3	7.6	7.8	8.0	8.0
200	3.0	4.2	4.9	5.5	6.0	6.4	6.6	6.8	6.9	6.9
250	2.7	3.7	4.4	5.0	5.4	5.7	5.9	6.1	6.2	6.2
300	2.5	3.4	4.0	4.5	4.9	5.2	5.4	5.5	5.6	5.7
350	2.3	3.1	3.7	4.2	4.5	4.8	5.0	5.1	5.2	5.2
400	2.1	2.9	3.5	3.9	4.2	4.5	4.7	4.8	4.9	4.9

To use this table, locate the nearest sample size and percentage estimate. If you need to estimate the sampling variability for a percentage estimate greater than 50 percent, subtract the percentage estimate from 100 percent and use the result.

For example, to determine the sampling variability for the percentage of disability claim manager awarded respondents rating overall service excellent/very good/good, go to the row which is closest to 342 (350) and then to the column which is closest to 6 percent (100 percent-94 percent) and read the sampling variability (±3.1 percent). This means that the approximate 95-percent confidence level interval around the 94-percent estimate ranges from 90.9 percent (94 percent - 3.1 percent) to 97.1 percent (94 percent +3.1 percent).

## Appendix VI: OWA Survey Results

### ***DCM EVALUATION - PHASE II EMPLOYEE/SITE COORDINATOR/MANAGER SURVEY RESULTS***

The Disability Process Redesign Team (DPRT) asked the Office of Workforce Analysis (OWA) to evaluate the human resource and service impacts of the DCM test including the current level of DCM comfort in the job, perceived learning curve, impacts on fraud, etc. To determine these impacts, OWA, with DPRT input, developed questionnaires and surveyed participants in both Phase I and Phase II of the test.

DCMs, Mentors/Coaches, Managers and Medical Consultants were asked to complete surveys in March 1999 for Phase I. OWA prepared a report of Phase I survey results in April 1999 for DPRT. The Lewin Group (the contractor hired to evaluate Phase I) incorporated many of the OWA survey results/findings into their overall evaluation report.

In addition, the Lewin Group was responsible for preparing the evaluation plan for Phase II, which began on November 1, 1999. This plan recommended that OWA survey test participants again. However, this time Lewin suggested only surveying DCMs who participated in Phase I and site coordinators/managers. Surveying just the DCMs who participated in Phase I would allow comparisons to be made. In addition, Lewin recommended removing questions that were not relevant to Phase II such as those soliciting reaction to the initial training, the mentoring/coaching process, etc. These questions were removed and additional questions were added to address issues more relevant to Phase II such as the ongoing availability of technical assistance, pending and receipt volumes, etc. After DPRT review and comment, OWA mailed the surveys to the participants in May 2000.

We received 157 DCM survey responses (68 State and 89 Federal) and 40 Site Coordinator/Manager responses (14 State, 23 Federal and 3 Combined). Some sites returned more than 1 site coordinator/manager survey (e.g., site coordinator and field office manager may have completed a survey).

Complete survey results are attached at tab A, however, major findings are provided below. Where appropriate, comparisons between Phase I and Phase II findings are made.

#### DCM Findings

##### **1. Are employees comfortable performing the DCM functions?**

*About half (53.6 percent) of the respondents reported they are "very comfortable" performing the DCM functions. Over 96 percent of Federal and State DCMs indicated they are either "very comfortable" or "somewhat comfortable." This is about 10 percent higher than the Phase I results.*

Close to half of the Federal respondents and over half of the State respondents believe it takes over a year to achieve a high level of comfort. This is much higher than the DCMs



originally thought it would take when they were surveyed in Phase I. Furthermore, when asked what they thought the learning curve was (time to become proficient), the majority thought 1-2 years, with 14 percent of Federal DCMs and 30 percent of State DCMs indicating the learning curve is more than 2 years.

As was the case in Phase I, over 85 percent of the DCM respondents had over 5 years of claims adjudication experience (48 percent with over 10 years experience).

**2. Has the DCM process impacted the potential for fraud (either claimant or employee) or employee physical security?**

*The majority of DCM respondents indicated the new process has no impact on the potential for claimant/employee fraud or employee physical security. This is consistent with Phase I results.*

In fact, several commented that they were able to pick up on inconsistencies between claimant statements made during the interview and information found in the medical records. For example, a claimant alleged she lived alone and medical records indicate she lived with a spouse. This may not have been discovered if multiple people were working on different parts of the claim.

Though most did not see an impact on the potential for employee fraud, several DCMs did see an increase in the potential since one person works on the entire case and has access to both SSA and DDS systems.

Many commented that at the beginning of the test, they did have a lot of anxiety surrounding physical security. As there have been no instances of violent outbreaks (other than an occasional angry claimant), their fears have eased somewhat. However, most still acknowledge the potential for security concerns, as they are the single-point of contact.

**3. How has the transition to DCM impacted job satisfaction?**

*Fifty-five percent of Federal DCMs and 46.4 percent of State DCMs stated his/her job satisfaction has improved significantly. Another 25.8 percent and 33.3 percent respectively felt it had improved somewhat. This, again, is consistent with the Phase I survey results.*

However, 11.6% of the Federal DCMs indicated his/her job satisfaction had decreased either somewhat or significantly in Phase II, compared to 7.2% in Phase I. Fewer State DCMs stated job satisfaction had decreased - going from 15.4% in Phase I to 13.0% in Phase II (although still a higher percentage than Federal DCMs).

Similarly, the most frequently cited reasons attributing to the increased job satisfaction for both Federal and State DCMs were the same as those identified in the Phase I survey. These include having control of the case from beginning to end, increased claimant

interaction, increased knowledge and better customer service (particularly for terminally ill (TERI) cases). The increase in pay was also a major factor for Federal employees.

Again, the areas in which the DCMs are most unhappy varied between Federal and State DCMs. Federal DCMs identified the increased workload expectations, the lack of access to DDS doctors, having to make up leads when they take time off and the uncertainty regarding the future of the test as the top areas of dissatisfaction.

State DCMs cited having to rely on others to trigger claims, discrepancies between Federal and State sites (especially pay), lack of clerical support and lack of State management support. Many of these were also identified in the Phase I survey. It is important to note that several of these issues are not directly related to the DCM process but more related to structural/environmental issues (such as legal constraints, site management and availability of support) that would have to be dealt with prior to a real-world implementation.

It is also interesting to note that in Phase II the number of areas of dissatisfaction far outnumbered the areas of satisfaction identified. The DCMs had lengthy and well-thought-out narrative comments - many even took the time to type pages of comments.

#### 4. Are DCMs able to obtain timely technical assistance when needed?

*Yes, over 86 percent of respondents stated they could receive the assistance they need "most of the time" or "always."*

However, there were far more State DCMs reporting they are "not usually" able to get technical assistance (14.5 percent compared to 4.8 percent for Federal DCMs). Surprisingly, overall the majority of time (59.9 percent) the technical assistance comes from another DCM. However, the State DCMs rely more heavily on other FO staff and Federal DCMs rely most heavily on another DCM.

Seventy-four percent of State DCMs further indicated that the person triggering his/her claims is "usually" or "always" the same person providing the technical assistance.



**5. Do employees believe local management supports DCMs and/or the DCM process?**

*Results were mixed. Fifty-two percent of State DCMs felt local management support was fair to poor; while 63.1 percent of Federal DCMs felt local management support was good or excellent.*

While DCMs were surveyed about local management support, many provided narrative comments regarding the lack of support/interest/communication from other levels of management, specifically the Regional Office, DDS and FO managers (DDSs unable to get cases triggered timely, FOs unable to get MC support/input timely) and Central Office.

**6. Has the DCM process impacted workload factors such as claimant cooperation in MER development and obtaining CEs?**

*Yes. Mirroring the results from the Phase I survey, about 75% of the State DCMs felt claimant cooperation in obtaining MER has increased with the DCM process and over 50% felt CE cooperation had improved.*

In fact, no one believed claimant cooperation had decreased with the DCM process. The primary reasons cited for this improved cooperation are the fact that the DCMs are building a better rapport with the claimants and explaining the process more clearly. Therefore, claimants have a better understanding of the importance of obtaining MER and keeping CE appointments.

**7. Has the DCM process impacted the volume of unproductive leads?**

*Yes, although about half of the Federal DCMs believe the DCM process has not changed the number of unproductive leads, 36.6% believe there are now fewer unproductive leads. These results are very similar to Phase I results with 48.4% indicating no change and 38.9% indicating fewer.*

This, again, is believed to be a result of improved communication and rapport with the claimants.

**8. Do DCMs feel the current volume of leads they receive is appropriate?**

*While over 60 percent of both State and Federal DCMs stated they are able to keep up with the volume of leads they are currently receiving, about a third of all respondents feel they are receiving too many. In addition, about 50 percent of State DCMs indicated the optimal number of leads is 7-9 per week, which is less than they are currently receiving.*

Several employees commented that because of the large volume of leads they receive every week, they spend the majority of time interviewing and do not have much time left to adjudicate. They also stated that the volume of "no shows" is less than what was

anticipated - which means they are conducting more full interviews than expected. In fact, the amount of time spent interviewing was one of the things about being a DCM that both State and Federal employees stated they dislike most frequently. Furthermore, both State and Federal DCMs are very concerned and upset that they must "make up" leads when they take time off, as this does not occur in the current process.

**9. Do DCMs believe the average volume of claims they have pending is appropriate?**

*Responses differed between Federal and State responders. The majority of Federal DCMs indicated they average 61-80 claims pending and the "optimal" number of claims would be 41-60 (52.9 percent). However, over 40 percent felt the optimal level was 61-80 claims.*

*The majority of State DCM responses (50.7 percent) show they average 41-60 claims pending and also believe this is the "optimal" number (56.5 percent). Only 17.4 percent thought 61-80 was optimal.*

It is interesting to note that in the Phase I survey significantly more of both Federal and State DCMs thought the optimal number of claims pending was between 26-40. This seems to indicate that as DCMs gained experience, expertise and comfort in the new process they also felt better able to handle a larger workload.

It should also be noted that several people commented in the narrative section that pendings are still growing due to a combination of the large number of leads, the lower than expected no show rate and having to make up leads for periods of leave. In addition to the number of claims pending, it is critical to monitor the age of claims pending to ensure they are still being processed timely.

**10. Do DCMs believe they have gotten over the learning curve and are currently at the maximum level of production?**

*Yes, 53.1 percent of Federal DCMs and 62.1 percent of State DCMs feel their current level of productivity is the highest level they can achieve.*

However, 43.2 percent of Federal and 28.8 percent of State DCMs believe they will still be able to increase productivity slightly.

Many respondents caveated their responses by saying that although production is up, the "quality" of decision-making and level of service being provided has suffered. They do not spend the same amount of time reviewing the claim or working with the claimant as they were able to in Phase I due to the increased emphasis being placed on "numbers." It should be noted that no actual decline in accuracy rates have been observed by QA reviewers - this is merely the perception of DCMs.



**11. Are Claims Support Specialists (CSS) and/or support personnel being used more consistently in Phase II than they were in Phase I?**

*It is not clear if CSSs are being utilized more consistently; however, DCMs identified more functions being done by CSSs, though primarily clerical in nature.*

In fact, many respondents (9) commented in the narrative section that they would prefer having more lower-graded clerical support rather than higher-graded paraprofessionals. DCMs feel they have a greater need for clerical assistance than adjudication assistance and several DCMs said many CSSs are "not receptive to doing "lower-graded" clerical functions." In support of this, most of the "other" functions the DCMs would like clericals to perform were clerical in nature.

**12. How do DCMs picture the DCM process interfacing with the current process and/or the prototype process?**

*The most frequent response in both the Federal (17) and State (10) sites was that DCMs could continue to process TERI cases and other "easy" allowances or sensitive cases.*

DCMs feel they are able to provide particularly good customer service in these types of cases because processing time is very low (sometimes processed the same day).

Several also stated the process is good the way it is. Still others expressed that they do not believe it interfaces at all with the current process.

## Management Findings

### **1. What areas do site coordinators/managers believe cause the most problems for the DCMs?**

*State site coordinators/managers cited SSI entitlement factors, getting someone to trigger cases and time management as 3 of the top problem areas for State DCMs. Federal site coordinators/managers identified RFC completion, not having access to medical staff and SSI entitlement factors (especially for former T2 CRs) as the top three problem areas. Combined site coordinators/managers listed SSI entitlement factors, desk/time management and the lack of time to review medical records.*

These are very similar to what the DCMs identified as things they "dislike" about being a DCM and/or the DCM process.

Most site coordinators/managers listed SSI as a problem area and most of them felt it was due to the lack of, or inefficient training being given on the topic.

### **2. What areas do site coordinators/managers believe DCMs are performing especially well?**

*State site coordinators/managers thought processing cases timely (especially TERI cases) and interviewing skills were two things the DCMs do well. Federal site coordinators/managers rated the level of public service, processing time and quality very highly. Combined site coordinators/managers also thought DCMs have very good interviewing skills.*

These, again, were things DCMs stated they like about the DCM process.

### **3. What difficulties/challenges are site coordinators/managers encountering?**

*State site coordinators/managers indicated getting cases triggered and keeping morale up considering the heavy workload. Federal site coordinators/managers most frequently cited they are having difficulty ensuring the DCMs are not overwhelmed with the volume of work. The combined site coordinators/managers also identified the heavy workload, not knowing the future of the test and having "State administrators threatening to pull the State DCMs from the test."*

### **4. How do site coordinators/managers picture the DCM process interfacing with the current process and/or the prototype process?**

*State, Federal and combined site coordinators/managers all agree DCMs would be good for processing TERI cases and other quick and obvious allowances. Some Federal site coordinators/managers also commented that DCMs could make the shift to prototype without much work. Some also stated that DCM would be ideal in a metropolitan office if the DDS was nearby and DDS management supported the process.*



It is also interesting to note that several site coordinators/managers and DCMs felt the DCM process, as it is today, could not be rolled out on a large scale basis because they do not believe an average DE or CR would be able to do this job.

**5. What were the site coordinators/managers comments regarding CSS utilization?**

*Managers comments in this area mirrored those of the DCMs. They do auxiliary claims, etc. but also felt DCMs would be better served by clerical support.*

Caveats to the Analysis

As identified in the Phase I survey findings, the following caveats should continue to be considered when interpreting the Phase II survey data:

1. Most of the DCMs selected had 5-10 year claims adjudication experience (either medical or non-medical aspects). They have been described as the "best of the best." Therefore, the results received in this test do not necessarily represent what will occur if the process is rolled out.
2. The survey (opinion) data are largely subjective and, thus, might not paint an accurate (objective) picture. These data should be analyzed in conjunction with quantitative processing time, productivity and quality data.
3. As seen in other piloting situations, participants are generally "happier" in the new position for several reasons including: after being in the same job for many years participants are now experiencing a change of environment, increased pay, as well as seeing the possibility that the position will lead to a permanent promotion.
4. Wide variations in workflow processes and clerical support between sites make comparison of data more difficult.

## Reactions/Conclusions

1. Based on the data from the mark sense forms, the DCMs have increased job satisfaction compared to their previous positions. However, the voluminous narrative comments received indicate there are several significant areas of dissatisfaction with the process that were not as prevalent in Phase I.

The fact that DCMs identified so many more things they dislike about the DCM process than things they like and more dislike in Phase II than they did in Phase I, would lead one to believe that overall job satisfaction had declined - however, this contradicts what was actually reported. (Federal DCMs identified 49 discreet things they "like" about being a DCM and 74 things they "dislike." State DCMs identified 35 different things they "like" and 70 things they "dislike.") This seems to indicate that, although the DCMs are happy with the general principles of DCM, the increased workload and emphasis on productivity, as well as the uncertain future of the test etc. create a lot of anxiety and apprehension for the test participants (both DCMs and site coordinators/managers). In fact, several DCMs stated they will not apply for a permanent position if it is rolled out.

In addition, though the current cadre of DCMs have an overall higher level of job satisfaction, several of the DCMs and site coordinators/ managers do not believe an average CR/DE could perform the full range of functions required for this job.

2. It is true that many cases were processed quickly. Additional analysis needs to be conducted and other factors considered when looking at this statistic. For example, presumptive disability, TERI and other dire need cases already receive expedited handling and are processed much quicker than the majority of cases under the current process. Analysis would need to be done to determine if a higher percentage of these cases are handled in the DCM test. OWA staff accompanied DPRT on several site visits and discovered that some Federal sites are receiving additional TERI cases, etc from the FO (in addition to the ones they receive via the normal leads process). It is not clear how many offices or how many cases are involved but it may warrant further investigation.

In addition, processing time should be analyzed in conjunction with other performance indicators. For example, processing time might be low but the age and volume of the pending cases might be high. Several DCMs commented that with the high volume of leads they have less time to adjudicate and pendings are increasing. As the test continues, it will become even more important to monitor the size and age of pending workloads to determine if service is impacted.

3. In order to maintain high levels of quality, DCMs should be given access to necessary training. As DCMs are required to know all aspects of claim adjudication, it is imperative that they stay abreast of policy and/or regulatory changes, as well as receive ongoing refresher training on some of the more complicated aspects of claims processing. Many DCMs commented that they would like to receive ongoing, periodic refresher training and also felt they were left "out of the loop" of several training sessions that were made available to DEs and/or CRs.



4. It appears DCMs have a greater need for clerical support than paraprofessional support and many are using CSSs primarily for clerical functions. Although CSSs are supposed to be completing auxiliary and representative payee applications, during the site visits, OWA staff found instances where auxiliary claims backlogs were growing because the CSSs did not have time to get to them. Again, it is not clear how frequently this occurs and DPRT did discourage this practice when it was discovered. However, this needs to be monitored and evaluated. Perhaps it would be more efficient to have DCMs complete the auxiliary applications and have additional clerical support.
5. If these experienced adjudicators (with over 5 years of prior claims adjudication experience) require, at a minimum, in excess of a year to become comfortable with the job, a newly trained DCM with no prior experience would be expected to take substantially longer to become fully proficient and productive.
6. The impact of the training required for national rollout of this process would be substantial - in terms of time and money. Employees would be pulled out of his/her current position for an extended period of time (backing up current workloads), they would be less than 100 percent productive in the new position for at least a year and the dollar cost of the training phenomenal. Careful consideration of these impacts should be made prior to any rollout decisions.

## Appendix VII: Comment Themes & Responses

As with prior redesign efforts, the draft DCM report was released for component and stakeholder comment. The major themes of the comments and how they were addressed are outlined below:

### *Positive Themes:*

Several stakeholders commented test findings were encouraging in that DCMs were successful in carrying out both medical and non-medical aspects of initial claims processing, based upon accuracy results.

Commenters were encouraged with the positive results from customer and employee job satisfaction surveys.

**Theme:** The draft report did not provide recommendations to SSA Executives regarding the next course of action for the DCM process.

**Response:** “Conclusions & Recommendations” were added to the final report.

**Theme:** The report did not address why the allowance rate at the reconsideration level was higher for the DCM group.

**Response:** Reconsideration data was sufficient in terms of volume but some claimants denied at the initial level still had their reconsideration appeal window open at the time the draft report was released. The reconsideration data was rerun and updated through August 10, 2001 based on claims clearances. The update resulted in the cumulative allowance rate through the reconsideration level being comparable. See the “*Allowance Rate*” section for more information.

**Theme:** Ultimate program costs were incomplete due to the lack of hearing level data.

**Response:** Updated hearing level data was included as part of the final report. As of August 2001, DCM had a 9.1% higher hearing filing rate, which is statistically significant. The DCM allowance rate was 3.3% higher than the control group; however, given the low volume of clearances and the high sampling variability, the ultimate allowance rate data has not yet stabilized. This is not unexpected given the test ended in November 2000, and not enough time has passed to allow many DCM claims to be processed through the hearing level. Experience from the Prototype test has shown that hearing data does not stabilize for at least one year following the end of the testing period.

<i>Theme:</i>	Commenters said the methodology used to evaluate productivity and cost was too complex and questioned the validity of the results. There was criticism because a “range” of productivity & costs were presented rather than pinpoint a figure.
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**Response:** There is no doubt that the cost and productivity sections of the evaluation were the most difficult to assess. During the comment period staff continued to validate and update both the data and approach used for these areas of the evaluation. Informational discussions were held with components to help in this assessment. There is general agreement that cost and productivity of the DCM process can not easily or precisely be calculated due to the complexities of data collection created by both the test structure and our current infrastructure. The following points summarize issues related to the DCM productivity and cost analysis:

- There is no single measure to determine the impact of blending federal and state functions. Assumptions were developed to build the DCM cost/productivity models;
- Claim Support Specialist positions were not consistently used from site to site, impeding our ability to fully assess the impact of their support;
- DCM workloads were not representative of the national-level workload mix. This was due to the fact that Title XVI childhood claims were excluded from the DCM workload;
- There was no control group to use as a direct comparison point for the cost/ productivity assessments. The DCM process was compared to the current process at the national level.
- Modified FO-based (WUPWY) and DDS-based (PPWY) productivity models were used to assess DCM production. Because WUPWY and PPWY calculations do not measure workyears per workloads using the same methodology, DCM productivity was shown under both calculations in a range. This range can not be averaged to produce a single number.



**Theme:** The equity in the comparisons for processing time, customer satisfaction, and employee job satisfaction was questioned due to the variables that existed between the DCM and control groups of cases. The DCM group had smaller caseloads and the ability to alter receipts if workloads were perceived to be unmanageable -- where the control group had larger caseloads and did not have the same ability to alter receipts. Also, the control group experienced delays due to insufficient resource availability at the DDSs.

**Response:** The "Processing Time" section of the report was modified to address these issues and includes a chart comparing average DCM pending to average disability examiner (DE) initial case pending.

**Theme:** Commenters had conflicting opinions regarding test results. Some commenters said test results were downplayed while others said results were overstated.

**Response:** Our objective was to report results fairly and objectively. Based upon comments received, modifications were made to the evaluation report that, hopefully, more fully portray circumstances experienced during the test as impartially as possible.

**Theme:** Pay disparities between federal and state employees are downplayed.

**Response:** The Executive Summary of the report was modified to highlight the issue of pay disparities between federal and state employees. This issue is also included in the "Impacts and Issues" section of the report.

**Theme:** The report does not include specific data breakouts by site type (individual, federal, and state).

**Response:** The intent of the DCM initiative was to test for efficiencies in the process *not* to compare DCM sites or site types to each other. Site level displays of data are not being supplied below the national level.

**Theme:** The report does not recognize that DCM denial accuracy fell below the federal regulatory threshold.

**Response:** Although denial accuracy for the DCM group was statistically comparable to the control group, the accuracy section of the report was updated to note that DCM denial accuracy fell below the regulatory threshold.

**Theme:** Commenters suggested wording modifications/deletions to the Office of Quality Assurance (OQA) and the Office of Workforce Analysis (OWA) reports (appendices V & VI).

**Response:** These documents have been officially released by the components and were source documents for information contained in the main body of the DCM evaluation report. Wording changes to said documents would be inappropriate.

**Theme:** Several commenters referenced whether DCMs were "*cream of the crop*."

**Response:** There is no doubt that DCMs were highly qualified individuals, as one would expect. However, not all the DCMs were within the top 5 - 10 percent of the workforce. Federal DCMs competed and were selected for the position just like any other federal position. State DCMs selection methods varied by State and included filing competitively, volunteering, and non-competitive selection.



## Appendix VIII: Key to Abbreviations

In the interest of conserving space, many abbreviations are used in the report & spreadsheets and are defined as follows:

<i>Term</i>	<i>Explanation</i>
#	Number (quantity) of items in that category.
%	Percentage of items in a category.
All or Allow	Allowances.
Case or Decision	DDS definition of a Medical Decision.
CE	Consultative examination-Additional evidence garnered at SSA initiative and expense needed to adequately evaluate a disability allegation.
Claim	Field office definition of an application for benefits.
Clsd Pd	Closed period of disability-an applicant who was disabled, and is potentially due payments in the retroactive period of the application, but is not disabled at the time of adjudication.
Cohort	A cohort is a subgroup of claims based on the original filing month.
Conc Concurrent	Concurrent claims: A claim for both Title II and Title XVI benefits; treated as one medical decision but two claims.
Control Control Group	DCM type claims randomly selected from parallel field offices using the current CR/DE process. Used for comparison purposes versus the DCM group of claims.
CSS	A claims support specialist & federal employee used as paraprofessional support for the DCM process.
Cum	Cumulative figures.
DCM	Disability Claims Manager, also used to refer to the site where DCMs are located, cases handled by a DCM, and the overall process employing DCMs to make medical decisions.
DI	Disability Insurance (Title II).
DPRT	Disability Process Redesign Team -- the component with oversight responsibility for the DCM test and evaluation.
Exclusion	Any case that is removed from the assessment universe for any reason.
FDCM	A federal disability claims manager.
Hearing	Second appeal level, except in Prototype states where the reconsideration step was eliminated, in which case it is the first appeal level.
IDA	Index of Dollar Accuracy.
Immune Def	Immune Deficiency related disability allegation.
Lead	The original contact from a potential applicant for benefits. Within the test, the lead was the original "purified" applicant that was selected randomly to participate in the DCM test group or the control group of claims.
MC	A medical consultant employed by the DDS.
MD Med	Medical Denial(s)-An application denied because the principal does not meet the SSA definition of disability.
MER	Medical Evidence of Record-An applicant's existing medical evidence at the time of the application.
MIICR	Management Information Initial Claims Report.

<i>Term</i>	<i>Explanation</i>
NA or N/A	Not Applicable-Whatever data is in the cell either cannot be computed (i.e. divided by 0) or makes no sense (i.e. processing time for cases that are excluded from processing time).
NDDSS	The National DDS case control system; data derived from this system is medical decision data rather than claims data.
Current Process	The historical process: a claims representative (CR) in a field office takes an application and makes the non-disability decision, a disability examiner (DE) in a DDS makes the disability decision.
OAT, Time, or OATime	The total number of days to adjudicate a claim from the initial application date until final clearance.
Paraselect	Clearance information from the field office case control system; data is based on claims clearances and has little medical information
Pending or Pndg	Cases filed that are still awaiting a decision.
PPWY	Production Per Work Year.
Prototype or Proto	The full process model pilot being used in 20% of cases nationally. Three DCM states (AL, CO, MI) are also prototype states.
Recon	Reconsideration, first appeal level of a decision in the current process, but eliminated in the Prototype states.
Reversed	Cases denied initially then allowed under appeal.
RIC	Regional implementation coordinator -- provided test oversight with respective regions and link between DPRT and the sites for communication and data collection.
SDCM	A state disability claims manager.
SC	Site coordinator.
SSIICR	Supplemental Security Income Initial Claims Report.
Site or J-Site	A DCM field location, whether in a DDS, a FO, or an autonomous location, all of which have field office codes beginning with a "J".
SSI	Supplemental Security Income (Title XVI).
S.V. or SV	Sampling variability -- measures how closely the sample results approximate conditions in the universe of cases being sampled.
T16	Title XVI (SSI) Claims
T2	Title II (SSA) Benefits
TD or Tech	Technical Denial(s)-An application denied for non-medical reasons such as excessive income or insured status.
WUPWY	Work Units Per Work Year.



#### 4) CAS Charts:

The following figures are from the Cost Analysis System SC3-Sum Report for Fiscal Year 2000.				
Workloads Processed are Initial Disability Claims				
Current Process	Organizational Component	Workload Processed	Work Years	PPWY
Title II	Sum Total	1,577,815	10,807.85	145.99
	OC		6.44	
	ODCHR		61.88	
	OLCA		5.24	
	CCEA		-	
	OACT <sup>1</sup>		5.49	
	OS		256.33	
	ITS <sup>2</sup>		-	
	RC <sup>3</sup>		4,525.88	
	DCOSS		18.81	
	PSC		18.31	
	DIO		370.89	
	OCRO		55.92	
	ODISP		1.88	
	FDDS		25.37	
	ODCP		16.37	
	OCOMM		16.28	
	DSA		4,963.60	
	FAM		459.16	
	OQAPA <sup>4</sup>		-	
	ORQAPA <sup>4</sup>		-	
	OFPO <sup>4</sup>		-	
	OFAM <sup>4</sup>		-	
<sup>1</sup> There are OACT costs for Title II, but not for Title XVI. <sup>2</sup> There are no ITS personnel costs, only dollar costs. <sup>3</sup> This includes all regional costs. <sup>4</sup> Staffing for these components are all included in the FAM total.				

The above figures show the Title II initial claims workloads processed along with associated workyears assigned for various agency components. Figures were taken from the CAS, SC-3 SUM Report for FY 2000.

Workloads Processed Are Initial Disability Claims				
Current Process	Organizational Component	Workload Processed	Work Years	PPWY
Title XVI	Sum Total	1,493,390	8,624.71	173.15
	OC		5.43	
	ODCHR		52.33	
	OLCA		4.49	
	CCEA		-	
	OACT <sup>1</sup>		-	
	OS		222.64	
	ITS <sup>2</sup>		-	
	RC <sup>3</sup>		4,153.12	
	DCOSS		15.83	
	PSC		77.36	
	DIO		-	
	OCRO		3.95	
	ODISP		72.67	
	FDDS		30.72	
	ODCP		13.83	
	OCOMM		13.75	
	DSA		3,610.95	
	FAM		347.64	
	OQAPA <sup>4</sup>		-	
	ORQAPA <sup>4</sup>		-	
	OFPO <sup>4</sup>		-	
	OFAM <sup>4</sup>		-	
<sup>1</sup> There are OACT costs for Title II, but not for Title XVI. <sup>2</sup> There are no ITS personnel costs, only dollar costs. <sup>3</sup> This includes all regional costs. <sup>4</sup> Staffing for these components are all included in the FAM total.				

The above figures were taken from the FY 2000 CASystem, SC-3 SUM Report for Activity 05 (Title XVI Disability).

Workloads Processed Are Initial Disability Claims				
Current Process	Organizational Component	Workload Processed	Work Years	PPWY
Total	Sum Total	3,071,205	19,433	158.04
	OC		11.87	
	ODCHR		114.21	
	OLCA		9.73	
	CCEA		0.00	
	OACT <sup>1</sup>		5.49	
	OS		478.97	
	ITS <sup>2</sup>		0.00	
	RC <sup>3</sup>		8679.00	
	DCOSS		34.64	
	PSC		95.67	
	DIO		370.89	
	OCRO		59.87	
	ODISP		74.55	
	FDDS		56.09	
	ODCP		30.20	
	OCOMM		30.03	
	DSA		8574.55	
	FAM		806.80	
	OQAPA <sup>4</sup>		0.00	
	ORQAPA <sup>4</sup>		0.00	
	OFPO <sup>4</sup>		0.00	
	OFAM <sup>4</sup>		0.00	
<sup>1</sup> There are OACT costs for Title II, but not for Title XVI. <sup>2</sup> There are no ITS personnel costs, only dollar costs. <sup>3</sup> This includes all regional costs. <sup>4</sup> Staffing for these components are all included in the FAM total.				

This chart shows the compiled staffing figures, based on the prior two charts.<sup>12</sup>

<sup>12</sup> The current process staff and production figures include some actions not within the parameters of the DCM test (for example, disabled child claims). The effect these actions have on this PPWY is unknown.



## **T-2 Summary Calculation:**

These figures are based on the pro-rata share of the agency component work years, except for the DCM sites and DDS Support Time.

DCM Title II	Organizational Component	Workload Processed	Work Years	PPWY
Title II	Sum Total	38,075	242.19	157.21
	OC		0.16	
	ODCHR		1.49	
	OLCA		0.13	
	CCEA		-	
	OACT		0.13	
	OS		6.19	
	ITS <sup>1</sup>		-	
	DCM Sites		169.57	
	RC		13.00	
	DCOSS		0.45	
	PSC		0.44	
	DIO		8.95	
	OCRO		1.35	
	ODISP		0.05	
	FDDS		0.61	
	ODCP		0.40	
	OCOMM		0.39	
	DDS Support		27.80	
	FAM		11.08	
	OQAPA <sup>2</sup>		-	
	ORQAPA <sup>2</sup>		-	
	OFPO <sup>2</sup>		-	
	OFAM <sup>2</sup>		-	

<sup>1</sup> There are OACT costs for Title II, but not for Title XVI.

<sup>2</sup> There are no ITS personnel costs, only dollar costs.

<sup>3</sup> This includes the pro rata share of all regional costs other than the direct DCM site costs.

<sup>4</sup> Staffing for these components are all included in the FAM total.

PPWY was determined by totalling "Workyears" assigned to each component (242.19). Total workyears were divided into the Title II claims production (38,075) to determine PPWY for Title II (157.21).

To determine DCM PPWY--staffing and workload data from the above "CAS Charts-Current Process" workload allocations were apportioned to the DCM on a pro-rated basis:

- All organizational component staffing work years, other than the DCM Sites, RC, and DDS Support, were determined by taking the "Workyears" figure for the component from the above "*Current Process*" Title II chart .

- “Workyears” were divided by the Workload Processed (1,577,815 claims) to determine workyears attributed to “other” component support. (For example, the Current Process Title II chart shows OC support as 6.44 work years. This, divided by 1,577,815 claims processed, provides the fractional overhead for this component’s support.)
- These fractional workyear numbers were multiplied by the number of claims processed by DCMs (38,075) to determine the workyears attributed to each organizational component for DCM support. (For example, the above fractional support, times 38,075 Title II claims processed by DCMs, equals the OC support charge of .16 work years shown above).
- “DCM Sites” workyears (169.57) are the volume of workyears from the first page of this PPWY calculation (workyears associated with DCM Title II clearances).
- “RC” workyears represent Regional support to the DCM. These were determined as follows:
  - Total regional staff was taken from the CAS, SC 3 SUM Report, Activity 02 (Category 2100, RC-S).
  - Appropriate overhead was determined by subtracting workyears directly supporting disability claims workloads. This figure was obtained from the CAS, C2-15A DET Report for Activity 2. Workyears attributed to category 1-4 were used.
  - The difference was divided by the volume of disability claims processed nationally (current process) to determine the proportionate workyear per claim support.
  - This number was multiplied by the volume of Title II claims processed by the DCM to determine the total amount of RC support.

## 5) DDS Support:

“DDS Support” workyears include administrative, medical and clerical support provided to the DCM by DDS staff. These were determined as follows:

- Medical support was determined by multiplying the number of DCM medical decisions by 64.4 minutes per decisions (DDS assistance for MC time, QA reviews and CE exams).

This number (work minutes) was divided by 60 to determined work hours, and by 2080 to determine workyears.

Workyears were then apportioned to Title II and XVI as previously explained.

- **Other Overhead support**

Other DDS overhead support was determined as follows:

- DDS staff hours (full and part time) were divided into hours worked by administrative personnel and other staff, to determine the national overhead percent. (Data was taken from the SAOR , FD: 14 Report for FY 2000.)
- The overhead percent was applied to the DDS (DSA) staffing used in the Title II Disability Claims process (SC 3 SUM, Activity 02 report).
- The resulting overhead number was divided by the number of disability claims processed by DCMs (1,577,815) to determine workyears per claim.
- Workyears per claim were multiplied by the number of Title II disability claims processed by DCMs to determine total workyears of DDS overhead support.
- The workyears for medical support and overhead were totalled to determine “DDS Support” workyears.



**6) Title XVI PPWY Calculation:**

DCM Title XVI	Organizational Component	Workload Processed	Work Years	PPWY
Title XVI	Sum Total	25,758	132.62	194.22
	OC		0.09	
	ODCHR		0.90	
	OLCA		0.08	
	CCEA		-	
	OACT		-	
	OS		3.84	
	ITS <sup>1</sup>		-	
	DCM Sites		99.16	
	RC		2.91	
	DCOSS		0.27	
	PSC		1.33	
	DIO		-	
	OCRO		0.07	
	ODISP		1.25	
	FDDS		0.53	
	ODCP		0.24	
	OCOMM		0.24	
	DDS Support		15.71	
	FAM		6.00	
	OQAPA <sup>2</sup>		-	
	ORQAPA <sup>2</sup>		-	
	OFPO <sup>2</sup>		-	
	OFAM <sup>2</sup>		-	
<sup>1</sup> There are OACT costs for Title II, but not for Title XVI. <sup>2</sup> There are no ITS personnel costs, only dollar costs. <sup>3</sup> This includes the pro rata share of all regional costs other than the direct DCM site costs. <sup>4</sup> Staffing for these components are all included in the FAM total.				

PPWY for Title XVI was determined in the same way as Title II (applying the same formulas but using data relative to Title XVI.). PPWY was determined by totalling "Workyears" assigned to each component (132.62). Total workyears were divided into the Title XVI claims production (25,758) to determine PPWY for Title XVI (194.22).

## 7) Combined Title II/XVI Calculation:

DCM Combined	Organizational Component	Workload Processed	Work Years	PPWY
Total	Sum Total	63,833	374.81	170.31
	OC		0.25	
	ODCHR		2.40	
	OLCA		0.20	
	CCEA		-	
	OACT		0.13	
	OS		10.03	
	ITS <sup>1</sup>		-	
	DCM Sites		268.74	
	RC		15.91	
	DCOSS		0.73	
	PSC		1.78	
	DIO		8.95	
	OCRO		1.42	
	ODISP		1.30	
	FDDS		1.14	
	ODCP		0.63	
	OCOMM		0.63	
	DDS Support		43.51	
	FAM		17.08	
	OQAPA <sup>2</sup>		-	
	ORQAPA <sup>2</sup>		-	
	OFPO <sup>2</sup>		-	
	OFAM <sup>2</sup>		-	
<sup>1</sup> There are OACT costs for Title II, but not for Title XVI. <sup>2</sup> There are no ITS personnel costs, only dollar costs. <sup>3</sup> This includes the pro rata share of all regional costs other than the direct DCM site costs. <sup>4</sup> Staffing for these components are all included in the FAM total.				

This chart is comparable to the *Current Process, Total Sheet* discussed above. It shows the combined Title II and XVI workloads, workyears assigned, and final PPWY.

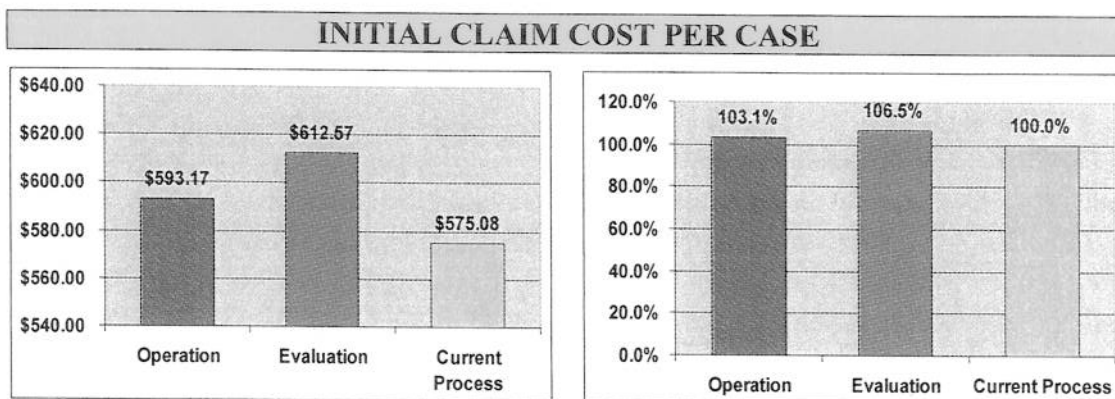
PPWY was determined by totalling "Workyears" from the Title II and XVI calculations ( $242.19 + 132.62 = 374.81$ ). Total workyears were divided into the total claims production ( $38,075$  Title II +  $25,758$  Title XVI =  $63,833$  total claims) to determine the final Production Per Work Year of  $170.31$  initial disability claims.



## COST

### 1) Dollar Cost Calculation:

The section that follows provides technical charts and assumptions related to the determination:



The cost model was built similarly to the PPWY model. The CAS was used to determine individual component costs in the current process. These costs were prorated to the DCM process based on the number of claims processed.

- Expected salary increases for both the DCMs and CSSs were factored into DCM cost projections. Expected salary differences between the current process and the DCM were determined by comparing the average claims representative salary (G2 11 Step 5) with a projected average DCM salary (GS 12 Step 5). The increase was averaged with the projected salary increase for the CSS position using a ratio of 2 DCMs per CSS. The CSS increase was computed by comparing an average Service Representative salary of GS 8 step 5 versus the CSS salary of GS 9 step 5.<sup>13</sup>
- The national per-claim personnel and other costs were determined by dividing personnel and other costs by the number of claims processed. This was then allocated to the DCM by multiplying the number of DCM claims processed by the determined national unit costs per claim.
- Regional and DDS personnel costs were determined by allocating overhead costs in the same manner staff support was determined.
- Personnel and other costs were totaled to determine total costs. This was divided by the total claims processed by the DCM to determine cost per claim.

<sup>13</sup> Due to individual state variability, DPRT was not able to determine an actual salary increase that could be expected for the SDCM position. The expected FDCM salary increase was applied to SDCM wages.

**2) Sources of data:**

- Office of Personnel Management pay charts for the Rest of the United States, FY 2000, were used to determine projected salary costs.
- The Cost Analysis System, FY 2000 SC-3 SUM and C2-15A, was used to determine claim processing costs in the current process and to extrapolate costs to the DCM.
- The Cost Analysis System SC-3 SUM, C2-15A DET report and the State Agency Operations Report (SAOR) for FY 2000 were used to calculate additional Regional and DDS support costs.
- A DPRT Database, based on data provided by test-state DDSs, was used to determine MER and CE costs.



### 3) Sample Calculation of Cost Per Claim:

Hours per Work Year  2,080  Standard SSA practice	DCM Staffing & Salaries			Total staffing data is from the weekly staffing reports maintained by the DCM team. Validation by T&A data is difficult due to mix of staff.	
	Position	Staff	Hours		
	SC	24.24			
	SDCM	76.39			
	FDCM	99.27			
	Other	6.55			
	CSS	47.23			
	Total Staff	253.69	567,313.50		Staff and hours worked from DPRT staffing reports.
Non-DIB Hrs		8,342.46	Hours used for work other than initial disability claims		
Work Years		268.74	Total Hours less Non-DIB hours, divided by 2080.		
Claims Cleared by DCMs	Category	Count	These are claims, not medical decisions.		
	DIB	38,075			
	DIB Aux				
	DI/BI	25,758			
To calculate pay differential we have used the journeyman's pay rate for the DCM and CSS positions, assuming that the grade structure will remain the same. We have also assumed that the state DCM will receive a commensurate raise. Personnel costs include salary plus benefits.					
Pay Differential for Federal DCM at 2:1 Ratio Using OPM Schedule					
		Average			
GS 11/5	\$ 47,412	GS 8/5	\$ 35,476 \$ 43,433		
GS 12/5	\$ 56,823	GS 9/5	\$ 39,184 \$ 50,943		
Difference	19.85%	Difference	10.45% 17.29%		
Personnel Costs (Including Benefits) for DCM Sites vs the Current Process					
Site	Nation	Cost/WY	DCM Difference	Cost/WY	
Field Office	8,679.00	\$ 58,436.30	17.29%	\$ 68,540.45	
State Agency	8,574.55	\$ 54,650.39	17.29%	\$ 64,099.92	
Average Cost				\$ 66,320.19	
				Medical Evidence	
To properly credit the time required to process DCM cases, the work done in the DDS to support the DCM process must be added to the work years required to produce the DCM workload.	Minutes Allocated for Work Done by DDS Staff	Category	Decisions	X 64.4	\$10.92
		Title 2	20,485	1,319,243.0	\$223,697.73
		Title 16	9,930	639,462.1	\$108,430.53
		Concurrent	13,096	843,403.3	\$143,011.86
		Total	43,511	2,802,108.4	\$475,140.12
				Additional Cost/WY	
We use 64.4 minutes per case for the DDS support.	DDS Time Allocated by Title	Category	Minutes	Work years	\$ 34,844.61
		Title II	1,740,944.64	13.95	\$486,077.96
		Title XVI	1,061,163.76	8.50	\$296,280.71
Data is from the PPWY calculation spreadsheet. The same definitions apply.					
		Title II		Title XVI	
		FO	DDS	FO	DDS
Clearances		38,075	27,033	25,758	16,478
Work Years		169.57	13.95	99.16	8.50

The following charts illustrate the method used to calculate cost per claim processed. The calculation uses the productivity data calculated above, and incorporates the same assumptions and principles used in the productivity calculation.

#### 4) Other Cost Factors:

This portion of the cost per claim calculation provides background data for the rest of the calculation.<sup>14</sup>:

- The pay differential for federal DCMs and CSSs was used to estimate the cost increase that could be expected for the DCM. (Averaged on a 1:2 ratio equals 17.29%)
- Personnel costs for the DCM were determined by dividing current process personnel costs from the SC-3: SUM for disability claims workloads by the staffing associated with those workloads. The cost per work year was increased by the expected pay differential computed above to determine the expected average DCM salary. (\$66,320.19)
- A cost for medical evidence has been added to this sheet to reflect the determined extra costs incurred by the DCM over the Control for requests for medical evidence (MER and CE) (\$10.92 per case equals \$475,140.12)
- Per the Office of Disability, the average salary for support personnel involved with medical consultation, quality assurance, and consultative examination support exceeds the average DDS salary. The 64.4 minutes per medical decision associated with these activities have been charged at this higher salary.(\$89,495)

<sup>14</sup> As referenced in the "Productivity" section of this report, adjustments in cost were made to accommodate certain support provided the DCM from outside the test. These adjustments included regional and DDS overhead, medical consultant time, quality assurance time, and consultative exam/clerical support in the DDS. Adjustments were not made for outside triggering support for SDCMs as these practices varied by site and the amount of time "saved" by SDCMs would have been relatively insignificant.



## 5) CAS Charts:

The following figures are from the Cost Analysis System SC3-Sum Report for Fiscal Year 2000.						
Current Process	Organizational Component	Workload Processed	Costs			Cost per Case
			Personnel	Other	Total	
Title II	Sum Total	1,577,815	\$ 624,701,054	\$ 329,262,136	\$ 953,963,190	\$ 604.61
	OC		\$ 660,354	\$ 403,943	\$ 1,064,297	\$ 0.67
	ODCHR		\$ 4,017,228	\$ 2,766,389	\$ 6,783,617	\$ 4.30
	OLCA		\$ 444,892	\$ 27,837	\$ 472,729	\$ 0.30
	CCEA		\$ 2,058,945	\$ 10,457,463	\$ 12,516,408	\$ 7.93
	OACT <sup>1</sup>		\$ 485,379	\$ 6,620	\$ 491,999	\$ 0.31
	OS		\$ 19,286,136	\$ 571,595	\$ 19,857,731	\$ 12.59
	ITS <sup>2</sup>		\$ -	\$ 36,283,523	\$ 36,283,523	\$ 23.00
	RC <sup>3</sup>		\$ 267,232,913	\$ 52,463,879	\$ 319,696,792	\$ 202.62
	DCOSS		\$ 1,527,490	\$ 1,513,015	\$ 3,040,505	\$ 1.93
	PSC		\$ 974,991	\$ 297,673	\$ 1,272,664	\$ 0.81
	DIO		\$ 17,824,584	\$ 1,263,531	\$ 19,088,115	\$ 12.10
	OCRO		\$ 2,319,900	\$ 322,416	\$ 2,642,316	\$ 1.67
	ODISP		\$ 161,390	\$ 108,318	\$ 269,708	\$ 0.17
	FDDS		\$ 1,527,083	\$ 2,680,502	\$ 4,207,585	\$ 2.67
	ODCP		\$ 1,135,738	\$ 111,292	\$ 1,247,030	\$ 0.79
	OCOMM		\$ 1,185,865	\$ 820,420	\$ 2,006,285	\$ 1.27
	DSA		\$ 271,262,698	\$ 217,848,025	\$ 489,110,723	\$ 309.99
	FAM		\$ 32,595,468	\$ 1,315,695	\$ 33,911,163	\$ 21.49
	OQAPA <sup>4</sup>		\$ -	\$ -	\$ -	\$ -
	ORQAPA <sup>4</sup>		\$ -	\$ -	\$ -	\$ -
	OFPO <sup>4</sup>		\$ -	\$ -	\$ -	\$ -
	OFAM <sup>4</sup>		\$ -	\$ -	\$ -	\$ -
<sup>1</sup> There are OACT costs for Title II, but not for Title XVI. <sup>2</sup> There are no ITS personnel costs, only dollar costs. <sup>3</sup> This includes all regional costs. <sup>4</sup> Staffing for these components are all included in the FAM total.						

The above chart shows the costs associated with processing Title II disability claims in the current process. The current process completed 1,577,815 claims in fiscal year 2000. These claims were processed with an average cost of \$604.61 per claim. This chart lists personnel costs, other costs, total costs and cost per case associated with the various components contributing to processing these claims. This data, as indicated, is taken from the Cost Analysis System, SC-SUM Report.

Current Process	Organizational Component	Workload Processed	Costs			Cost per Case
			Personnel	Other	Total	
Title XVI	Sum Total	1,493,390	\$ 500,120,022	\$ 312,097,871	\$ 812,217,893	\$ 543.88
	OC		\$ 558,252	\$ 341,604	\$ 899,856	\$ 0.60
	ODCHR		\$ 3,396,105	\$ 2,338,756	\$ 5,734,861	\$ 3.84
	OLCA		\$ 381,459	\$ 23,872	\$ 405,331	\$ 0.27
	CCEA		\$ 1,776,280	\$ 16,751,751	\$ 18,528,031	\$ 12.41
	OACT <sup>1</sup>		\$ -	\$ -	\$ -	\$ -
	OS		\$ 16,748,307	\$ 463,445	\$ 17,211,752	\$ 11.53
	ITS <sup>2</sup>		\$ -	\$ 32,179,223	\$ 32,179,223	\$ 21.55
	RC <sup>3</sup>		\$ 239,935,775	\$ 47,616,878	\$ 287,552,653	\$ 192.55
	DCOSS		\$ 1,285,752	\$ 1,273,135	\$ 2,558,887	\$ 1.71
	PSC		\$ 3,914,894	\$ 1,257,565	\$ 5,172,459	\$ 3.46
	DIO		\$ 326	\$ 17	\$ 343	\$ 0.00
	OCRO		\$ 143,239	\$ 23,732	\$ 166,971	\$ 0.11
	ODISP		\$ 6,229,497	\$ 5,374,041	\$ 11,603,538	\$ 7.77
	FDDS		\$ 1,848,163	\$ 3,243,497	\$ 5,091,660	\$ 3.41
	ODCP		\$ 958,896	\$ 278,481	\$ 1,237,377	\$ 0.83
	OCOMM		\$ 1,002,513	\$ 693,234	\$ 1,695,747	\$ 1.14
	DSA		\$ 197,339,843	\$ 199,223,815	\$ 396,563,658	\$ 265.55
	FAM		\$ 24,600,721	\$ 1,014,825	\$ 25,615,546	\$ 17.15
	OQAPA <sup>4</sup>		\$ -	\$ -	\$ -	\$ -
	ORQAPA <sup>4</sup>		\$ -	\$ -	\$ -	\$ -
	OFPO <sup>4</sup>		\$ -	\$ -	\$ -	\$ -
	OFAM <sup>4</sup>		\$ -	\$ -	\$ -	\$ -
<sup>1</sup> There are OACT costs for Title II, but not for Title XVI. <sup>2</sup> There are no ITS personnel costs, only dollar costs. <sup>3</sup> This includes all regional costs. <sup>4</sup> Staffing for these components are all included in the FAM total.						

This chart provides Agency cost data for the T16 initial disability claims process. The current process completed 1,493,390 claims with a cost per case of \$543.88.



Current Process	Organizational Component	Workload Processed	Costs			Cost per Case
			Personnel	Other	Total	
Combined	Sum Total	3,071,205	\$ 1,124,821,076	\$ 641,360,007	\$ 1,766,181,083	\$ 575.08
	OC		\$ 1,218,606	\$ 745,547	\$ 1,964,153	\$ 0.64
	ODCHR		\$ 7,413,333	\$ 5,105,145	\$ 12,518,478	\$ 4.08
	OLCA		\$ 826,351	\$ 51,709	\$ 878,060	\$ 0.29
	CCEA		\$ 3,835,225	\$ 27,209,214	\$ 31,044,439	\$ 10.11
	OACT <sup>1</sup>		\$ 485,379	\$ 6,620	\$ 491,999	\$ 0.16
	OS		\$ 36,034,443	\$ 1,035,040	\$ 37,069,483	\$ 12.07
	ITS <sup>2</sup>		\$ -	\$ 68,462,746	\$ 68,462,746	\$ 22.29
	RC <sup>3</sup>		\$ 507,168,688	\$ 100,080,757	\$ 607,249,445	\$ 197.72
	DCOSS		\$ 2,813,242	\$ 2,786,150	\$ 5,599,392	\$ 1.82
	PSC		\$ 4,889,885	\$ 1,555,238	\$ 6,445,123	\$ 2.10
	DIO		\$ 17,824,910	\$ 1,263,548	\$ 19,088,458	\$ 6.22
	OCRO		\$ 2,463,139	\$ 346,148	\$ 2,809,287	\$ 0.91
	ODISP		\$ 6,390,887	\$ 5,482,359	\$ 11,873,246	\$ 3.87
	FDDS		\$ 3,375,246	\$ 5,923,999	\$ 9,299,245	\$ 3.03
	ODCP		\$ 2,094,634	\$ 389,773	\$ 2,484,407	\$ 0.81
	OCOMM		\$ 2,188,378	\$ 1,513,654	\$ 3,702,032	\$ 1.21
	DSA		\$ 468,602,541	\$ 417,071,840	\$ 885,674,381	\$ 288.38
	FAM		\$ 57,196,189	\$ 2,330,520	\$ 59,526,709	\$ 19.38
	OQAPA <sup>4</sup>		\$ -	\$ -	\$ -	\$ -
	ORQAPA <sup>4</sup>		\$ -	\$ -	\$ -	\$ -
	OFPO <sup>4</sup>		\$ -	\$ -	\$ -	\$ -
	OFAM <sup>4</sup>		\$ -	\$ -	\$ -	\$ -
<sup>1</sup> There are OACT costs for Title II, but not for Title XVI. <sup>2</sup> There are no ITS personnel costs, only dollar costs. <sup>3</sup> This includes all regional costs. <sup>4</sup> Staffing for these components are all included in the FAM total.						

This chart totals the Title II and Title XVI costs and claims processed from their respective charts. It shows total claims processed of 3,071,205 and a cost per case of \$575.08.

## 6) Title II Calculation:

These figures are based on the pro-rata share of the agency component costs, except for the DCM sites, DDS Support costs, and RC Support costs. The "DCM Sites" category includes all personnel in the DCM site, whether federal, state, or combined. The "DDS Support" category includes credit for the work done in the state agencies in support of their DCM sites: 64.4 minutes per decision and costs associated with DDS oversight.						
DCM Sites	Organizational Component	Workload Processed	Costs			Cost per Case
			Personnel	Other	Total	
Title II	Sum Total	38,075	\$ 16,189,304	\$ 8,240,784	\$ 24,430,088	\$ 641.63
	OC		\$ 15,935	\$ 9,748	\$ 25,683	\$ 0.67
	ODCHR		\$ 96,942	\$ 66,757	\$ 163,699	\$ 4.30
	OLCA		\$ 10,736	\$ 672	\$ 11,408	\$ 0.30
	CCEA		\$ 49,685	\$ 252,354	\$ 302,039	\$ 7.93
	OACT <sup>1</sup>		\$ 11,713	\$ 160	\$ 11,873	\$ 0.31
	OS		\$ 465,403	\$ 13,793	\$ 479,196	\$ 12.59
	ITS <sup>2</sup>		\$ -	\$ 875,575	\$ 875,575	\$ 23.00
	DCM Sites		\$ 11,246,029	\$ 1,266,031	\$ 12,512,059	\$ 328.62
	RC <sup>3</sup>		\$ 857,458		\$ 857,458	\$ 22.52
	DCOSS		\$ 36,861	\$ 36,511	\$ 73,372	\$ 1.93
	PSC		\$ 23,528	\$ 7,183	\$ 30,711	\$ 0.81
	DIO		\$ 430,133	\$ 30,491	\$ 460,624	\$ 12.10
	OCRO		\$ 55,983	\$ 7,780	\$ 63,763	\$ 1.67
	ODISP		\$ 3,895	\$ 2,614	\$ 6,508	\$ 0.17
	FDDS		\$ 36,851	\$ 64,684	\$ 101,535	\$ 2.67
	ODCP		\$ 27,407	\$ 2,686	\$ 30,093	\$ 0.79
	OCOMM		\$ 28,617	\$ 19,798	\$ 48,415	\$ 1.27
	DDS Support		\$ 2,005,553	\$ 5,552,197	\$ 7,557,751	\$ 198.50
	FAM		\$ 786,577	\$ 31,750	\$ 818,326	\$ 21.49
	OQAPA <sup>4</sup>		\$ -	\$ -	\$ -	\$ -
	ORQAPA <sup>4</sup>		\$ -	\$ -	\$ -	\$ -
	OFPO <sup>4</sup>		\$ -	\$ -	\$ -	\$ -
	OFAM <sup>4</sup>		\$ -	\$ -	\$ -	\$ -
<sup>1</sup> There are OACT costs for Title II, but not for Title XVI. <sup>2</sup> There are no ITS personnel costs, only dollar costs. <sup>3</sup> This includes the pro rata share of all regional costs other than the direct DCM site costs. <sup>4</sup> Staffing for these components are all included in the FAM total.						

The DCM processed 38,075 Title II initial disability claims with a cost per case of \$641.63.

The costs charged to the DCM process were calculated in the same manner as staffing in the above PPWY Calculation. Using Current Process costs, a cost per case in the current process was determined by dividing the respective component costs by the volume of claims processed.

- The DCM was charged with proportionate costs based upon the number of claims processed by the DCM.
- The only costs not determined in this manner were the personnel costs associated with the DCM sites, RC, and DDS Support. Staffing costs for these categories were based on the staffing numbers determined in the PPWY calculation in the "Key Issue: Productivity and Cost Efficiency" section.

- The projected DCM average salary determined on the first page of this calculation was multiplied by the DCM staff counts to determine DCM personnel costs.
- DDS support personnel costs were determined by applying the average DDS salary from the first page of this sheet to the staffing from the appropriate PPWY sheet. The DCM cost adjustment factor was not used for this calculation as support personnel salaries would likely not be increased under the DCM. The extra salary costs associated with medical and CE support were added.
- DCM additional support reflects the apportioned cost per case for DCM support plus the added cost the DCM incurred for MER and CE.
- RC personnel costs were apportioned on a per claim basis, using the same calculations as those in the PPWY calculation. Specifically identified RC support costs were apportioned on a per claim basis in the current process. This unit cost was then applied to the claims processed by the DCM to determine RC support.



**7) Title XVI Calculation:**

DCM Sites	Organizational Component	Workload Processed	Costs			Cost per Case
			Personnel	Other	Total	
Title XVI	Sum Total	25,758	\$ 9,037,410	\$ 5,634,509	\$ 14,671,919	\$ 569.61
	OC		\$ 9,629	\$ 5,892	\$ 15,521	\$ 0.60
	ODCHR		\$ 58,576	\$ 40,339	\$ 98,915	\$ 3.84
	OLCA		\$ 6,579	\$ 412	\$ 6,991	\$ 0.27
	CCEA		\$ 30,637	\$ 288,934	\$ 319,572	\$ 12.41
	OACT <sup>1</sup>		\$ -	\$ -	\$ -	\$ -
	OS		\$ 288,875	\$ 7,994	\$ 296,868	\$ 11.53
	ITS <sup>2</sup>		\$ -	\$ 555,027	\$ 555,027	\$ 21.55
	DCM Sites		\$ 6,576,598	\$ 821,296	\$ 7,397,894	\$ 287.21
	RC <sup>3</sup>		\$ 222,228		\$ 222,228	\$ 8.63
	DCOSS		\$ 22,177	\$ 21,959	\$ 44,136	\$ 1.71
	PSC		\$ 67,524	\$ 21,690	\$ 89,215	\$ 3.46
	DIO		\$ 6	\$ 0	\$ 6	\$ 0.00
	OCRO		\$ 2,471	\$ 409	\$ 2,880	\$ 0.11
	ODISP		\$ 107,446	\$ 92,691	\$ 200,138	\$ 7.77
	FDDS		\$ 31,877	\$ 55,944	\$ 87,821	\$ 3.41
	ODCP		\$ 16,539	\$ 4,803	\$ 21,342	\$ 0.83
	OCOMM		\$ 17,291	\$ 11,957	\$ 29,248	\$ 1.14
	DDS Support		\$ 1,154,644	\$ 3,687,656	\$ 4,842,300	\$ 187.99
	FAM		\$ 424,313	\$ 17,504	\$ 441,817	\$ 17.15
	OQAPA <sup>4</sup>		\$ -	\$ -	\$ -	\$ -
	ORQAPA <sup>4</sup>		\$ -	\$ -	\$ -	\$ -
	OFPO <sup>4</sup>		\$ -	\$ -	\$ -	\$ -
	OFAM <sup>4</sup>		\$ -	\$ -	\$ -	\$ -
<sup>1</sup> There are OACT costs for Title II, but not for Title XVI. <sup>2</sup> There are no ITS personnel costs, only dollar costs. <sup>3</sup> This includes the pro rata share of all regional costs other than the direct DCM site costs. <sup>4</sup> Staffing for these components are all included in the FAM total.						

Title XVI costs were determined in the same manner as Title II costs, using the Title XVI staffing, claims processed, and current process costs. The DCM processed 25,758 initial Title XVI disability and blindness claims with a cost of \$569.61 per case.

**8) Combined Title II/ Title XVI Calculation:**

DCM Sites	Organizational Component	Workload Processed	Costs			Cost per Case
			Personnel	Other	Total	
Combined	Sum Total	63,833	\$ 25,226,714	\$ 13,875,293	\$ 39,102,007	\$ 612.57
	OC		\$ 25,564	\$ 15,640	\$ 41,204	\$ 0.65
	ODCHR		\$ 155,518	\$ 107,096	\$ 262,614	\$ 4.11
	OLCA		\$ 17,315	\$ 1,083	\$ 18,399	\$ 0.29
	CCEA		\$ 80,323	\$ 541,288	\$ 621,611	\$ 9.74
	OACT <sup>1</sup>		\$ 11,713	\$ 160	\$ 11,873	\$ 0.19
	OS		\$ 754,278	\$ 21,787	\$ 776,065	\$ 12.16
	ITS <sup>2</sup>		\$ -	\$ 1,430,602	\$ 1,430,602	\$ 22.41
	DCM Sites		\$ 17,822,626	\$ 2,087,327	\$ 19,909,953	\$ 311.91
	RC <sup>3</sup>		\$ 1,079,686	\$ -	\$ 1,079,686	\$ 16.91
	DCOSS		\$ 59,037	\$ 58,470	\$ 117,508	\$ 1.84
	PSC		\$ 91,052	\$ 28,874	\$ 119,926	\$ 1.88
	DIO		\$ 430,139	\$ 30,491	\$ 460,630	\$ 7.22
	OCRO		\$ 58,453	\$ 8,190	\$ 66,643	\$ 1.04
	ODISP		\$ 111,341	\$ 95,305	\$ 206,646	\$ 3.24
	FDDS		\$ 68,728	\$ 120,628	\$ 189,356	\$ 2.97
	ODCP		\$ 43,946	\$ 7,489	\$ 51,435	\$ 0.81
	OCOMM		\$ 45,908	\$ 31,755	\$ 77,663	\$ 1.22
	DDS Support		\$ 3,160,197	\$ 9,239,854	\$ 12,400,051	\$ 194.26
	FAM		\$ 1,210,890	\$ 49,253	\$ 1,260,143	\$ 19.74
	OQAPA <sup>4</sup>		\$ -	\$ -	\$ -	\$ -
	ORQAPA <sup>4</sup>		\$ -	\$ -	\$ -	\$ -
	OFPO <sup>4</sup>		\$ -	\$ -	\$ -	\$ -
	OFAM <sup>4</sup>		\$ -	\$ -	\$ -	\$ -
<sup>1</sup> There are OACT costs for Title II, but not for Title XVI. <sup>2</sup> There are no ITS personnel costs, only dollar costs. <sup>3</sup> This includes the pro rata share of all regional costs other than the direct DCM site costs. <sup>4</sup> Staffing for these components are all included in the FAM total.						

The combined Title II and Title XVI costs indicate a total cost per case of \$612.57. This is based on a total of 63,833 initial disability claims processed by the DCM sites and the estimated costs associated with this processing.

## 9) Medical Costs

### MER and CE Costs

- The control group paid for MER in 12% fewer cases than the DCM. The control group also experienced a 7% lower MER cost per case with paid MER. .
- The control group paid for CEs in 11% fewer cases than the DCM. The control group experienced a 2% higher CE cost per case with paid CE. .
- The DCM combined MER and CE cost per medical decision was 14% greater than the control.



**Appendix V-1: OQA Customer Satisfaction Survey Summary****SOCIAL SECURITY**

## MEMORANDUM

31110-7-2353

Date: 4/30/01

Refer To: S1KE

To: Senior Advisor to the Acting Commissioner

Associate Commissioner  
for DisabilityFrom: Associate Commissioner  
for Quality Assurance and Performance AssessmentSubject: Disability Claim Manager (DCM) Phase II Customer Survey Report—  
INFORMATION

The attached report provides the final results of the DCM Phase II customer survey. In addition to detailing the findings of the DCM survey, the report includes comparisons with customer satisfaction in the current disability process, as measured by the fiscal year 2000 Market Measurement Program (MMP) customer segment survey of initial disability (DI) applicants.

The DCM survey was conducted by staff in the Regional Offices of Quality Assurance and Performance Assessment over the telephone during August and September 2000. The findings are based on the responses of 344 awarded (89-percent response rate) and 296 denied (72-percent response rate) claimants who experienced the DCM process. Individuals were selected for the survey based on DCM medical decisions made from April 30 through June 30, 2000 and contacted for the survey interview after the notice of decision was released.

As in previous surveys of disability applicants, the DCM survey found that the perception of overall service was most strongly affected by the outcome of the claim. While awarded respondents rated service very highly, at 94 percent excellent, very good or good (E/VG/G), denied respondents gave a significantly lower rating of only 68 percent.

However, ratings of other aspects of service leave an impression of a process that, in many respects, is well received by all customers. This is particularly evident in ratings of employee attributes – helpfulness, courtesy, job knowledge and time spent with the

claimant. Awarded respondents gave almost perfect 97 or 98 percent E/VG/G ratings for these aspects of service. Denied respondents, traditionally much less satisfied with all aspects of service, gave surprisingly high attribute ratings of 88 to 96 percent, with job knowledge as the top-rated aspect of service. And, in fact, comparison with results of the MMP Initial DI survey showed that DCM ratings for all employee attributes were significantly higher than in the current process for awarded and denied claimants alike.

Other comparisons with the Initial DI survey results also reflect a positive customer perspective on the DCM process. Ratings of processing time, the number of contacts to complete the application and decision notice clarity were all significantly higher for both awarded and denied DCM respondents than for the corresponding groups in the Initial DI survey. The 94-percent overall satisfaction rate of awarded respondents compared favorably with the Initial DI rate of 91 percent, although the difference was not statistically significant. For denied claimants, however, the 68-percent satisfaction rating from DCM respondents represented a statistically significant improvement over the 55-percent rate of their current process counterparts.

If you would like to discuss the findings in this report or have further questions, please call me on extension 53815. Members of your staff may contact Robyn Proctor on extension 50311.

/s/

Thomas C.

Evans

Attachments

cc:

Mr. Spencer

Mr. Sopper



## Appendix V-2: OQA Customer Satisfaction Survey Results

### *Disability Claim Manager Phase II Customer Satisfaction Survey*

#### *Survey Methodology*

- The disability claim manager (DCM) Phase II customer satisfaction survey was developed in coordination with the Disability Process Redesign Team and built on experience gained in earlier Office of Quality Assurance and Performance Assessment (OQA) surveys of disability applicants. Questions obtained details about the claimant's experience filing for benefits through a DCM, addressing the logical sequence of events in the application process. In addition, the survey elicited ratings of aspects of service universally important to initial claims customers, using SSA's 6-point world-class service scale which ranges from excellent to very poor. These ratings can be compared with baseline data from OQA's fiscal year (FY) 2000 Market Measurement Program (MMP) Survey of Initial Disability (DI) applicants, which measured customer satisfaction with the current disability process.
- The sample for the survey was selected from final DCM award and medical denial decisions made in the 2-month period from April 30, 2000 through June 30, 2000. Both title II and title XVI decisions were included. Staff in the Regional Offices of Quality Assurance and Performance Assessment conducted the interviews by telephone in August and September 2000. Individuals were contacted after the notice of award or denial was released to ensure that the process was complete from the claimant's perspective. Shown below are the very high response rates they achieved.

<u>Strata</u>	<u>Completed Surveys</u>	<u>Response Rate</u>
DCM Awards	344	89%
DCM Denials	296	72%

The discussion that follows highlights key survey results, noting statistically significant findings as appropriate. Typical comments provided by respondents are shown in italics in the pertinent sections.

The complete DCM survey results, presented separately for awards and denials, are included in tab A. Survey results are presented there in an annotated questionnaire showing the number of responders and response percentages for each question. Tab A also provides comparison with findings from the MMP Initial DI survey, which were recalculated to exclude title XVI children's cases and technical denials so that results would better parallel the DCM sample. Tab B contains a table for estimating sampling variability for individual responses.

#### Satisfaction With the DCM Phase II Process

- Not unexpectedly, outcome was the main driver of satisfaction with the DCM Phase II process, affecting the ratings of almost all aspects of service. The impact was especially

### **Factors Affecting Overall Satisfaction**

- When asked for further explanation, DCM respondents who were dissatisfied with overall service cited long processing times, employee shortcomings and unclear or incomplete explanations as the reasons for their rating. Denied respondents also often attributed the rating to disagreement with the decision and a perception that their medical condition was not adequately evaluated.
- Along the same lines, cross-tabulation of survey results indicated that poor ratings of employee performance, clarity of explanations and processing time had a strong negative impact on overall satisfaction for both awarded and denied respondents. For example, even the ratings of awarded respondents, who were so highly satisfied with overall service, reflected a distinct difference based on satisfaction with processing time. Of the awarded respondents who rated processing time E/VG/G, 97 percent were satisfied with SSA service overall. In contrast, only 50 percent of awarded respondents who were dissatisfied with claims processing time rated overall service as highly.

*"The amount of time it took to process my application caused a hardship because I cannot work."*

Similarly, the ratings of denied respondents were strongly affected by satisfaction with DCM explanations of how the medical condition was evaluated. Denied respondents who were satisfied with these explanations rated overall service 77 percent E/VG/G compared to 49 percent for those who did not think the explanations were clear.

*"I feel the explanation given me was not very good. It was not very clear and I did not understand it."*

- Awarded respondents who indicated their calls to the DCM were returned the same day or the next day rated overall service very highly, 97 percent and 95 percent E/VG/G, respectively. (Eighty percent of awarded respondents said the call was returned by the next day.) If the DCM returned the call more than 1 day after the respondent left the message, however, satisfaction dropped to 78 percent E/VG/G. A similar pattern was noted for denied respondents where ratings dipped from 69 percent E/VG/G to 33 percent E/VG/G for the same timeframe.

*"Had to leave messages and the person would not call me back until two or three days later."*

- Only 43 percent of awarded and 25 percent of denied respondents knew the DCM was the person who made the medical decision on the claim. No difference was seen in the overall satisfaction of awarded respondents whether or not they had been advised of this fact. For denied respondents, however, the knowledge of the DCM's role had an unexpected impact on overall service ratings. Denied respondents who were aware that the DCM made the medical decision reported significantly higher E/VG/G ratings for overall service (81 percent) than those who were unaware of this fact (66 percent). Denied respondents in



the first group may feel more satisfied because the process was more personal, giving them direct access to the decisionmaker.

*"Liked having one person take care of everything."*

*"I think that having one person to go through the whole process with is better. Being able to call SSA and have someone to ask for was very important."*

### **Comparison of DCM Phase II Process and MMP Initial DI Claims Experience**

- DCM Phase II survey results can be compared to findings from the MMP Initial DI survey, which measured the satisfaction of initial claimants in the current disability process. The Initial DI survey was conducted by mail in FY 2000 with 747 awarded and 432 denied disability applicants. The sample excluded all claims processed under disability redesign, whether in the DCM process or prototype. In order to match the makeup of the DCM sample for this comparison, survey responses from title XVI children's claims and any nonmedical denials were removed from the MMP Initial DI data tabulations.
- The DCM process promoted the use of the telephone to file the benefit application. As a result, based on survey responses, a much larger proportion of DCM claims were filed over the telephone (about three-quarters of both awards and denials) than in the current process (less than half). While a small proportion of DCM respondents who filed over the telephone visited the office at some other time, the majority of both awarded (61 percent) and denied (67 percent) participants dealt with the DCM entirely over the telephone throughout the claims process.
- The difference in filing method may have produced some of the statistically significant differences in completion of medical forms that are also reflected in the survey data. DCM participants, especially awardees, were more often asked (93 vs. 84 percent) and more often able (60 vs. 45 percent) to complete the medical forms on their own. However, DCM participants less often requested their own medical reports (24 percent awards; 17 percent denials) compared to current process applicants (39 percent awards; 38 percent denials). This difference may be a function of the DCM process, which calls for immediate initiation of medical development by the DCM.
- Significantly fewer DCM than Initial DI respondents reported that they had been sent for a consultative examination in connection with the disability claim, indicating there may be some differences in the types of disabilities and availability of medical evidence for the two populations. This was true for both awarded (a 23-percentage point difference) and denied claimants (15-percentage point difference).
- These findings suggest there may be some inherent differences in the characteristics of individuals participating in the DCM process in terms of the nature of their impairments and their ability to negotiate the claims process. Whether these potential differences had any effect on levels of satisfaction or understanding of the DCM process compared to the current process cannot be discerned from the survey data, but the possibility should be kept in mind.

### **Comparison of DCM Phase II Process and MMP Initial DI Satisfaction**

- Awarded respondents in both surveys were similarly satisfied with SSA service overall. While the 94-percent satisfaction rate of awarded respondents in the DCM survey was slightly higher than the 91-percent rate found in the Initial DI survey, the difference was not statistically significant. The 68-percent satisfaction rate of denied DCM respondents, on the other hand, was significantly higher than the 55-percent E/VG/G rating of their counterparts in the current process.

*"My entire experience with Social Security was excellent from beginning to end."*

- In the DCM survey, both awarded and denied respondents were significantly more satisfied with all aspects of employee performance compared to the Initial DI respondents.

SATISFACTION WITH EMPLOYEE ATTRIBUTES				
E/VG/G RATINGS	AWARDS		DENIALS	
	DCM	INITIAL DI	DCM	INITIAL DI
Caring/helpful	97%*	94%	88%*	82%
Courtesy	98*	94	94*	83
Knowledge	98*	94	96*	85
Time spent	98*	94	88*	82

\* Statistically significant difference compared to the current process.

*"The employees were more caring and attentive now than they used to be before."*

- DCM awarded and denied respondents generally rated the clarity of explanations slightly higher than their current process counterparts. For the most part, the differences were not statistically significant. However, DCM denied respondents did give a significantly higher rating to the explanation of how their medical condition was evaluated, an important element of the process.

SATISFACTION WITH EXPLANATIONS				
E/VG/G RATINGS	AWARDS		DENIALS	
	DCM	INITIAL DI	DCM	INITIAL DI
Information/documents needed to file	99%*	96%	89%	84%
Disability rules and requirements	95	94	77	72
Application process: How medical condition was evaluated	94	91	71*	60
Changes to report	95	94	NA	NA
Effect of return to work	92	89	NA	NA

\* Statistically significant difference compared to the current process.

*"The interviewer I worked with showed much more interest in helping us with the paperwork and answering all of our questions than the previous time I applied."*

- Compared to the Initial DI survey, both strata of DCM respondents were much more satisfied with the number of contacts made about their application, as well as with the claims processing time.



SATISFACTION WITH CONTACTS AND PROCESSING TIME				
E/VG/G RATINGS	AWARDS		DENIALS	
	DCM	INITIAL DI	DCM	INITIAL DI
Number of contacts	94%*	87%	80%*	61%
Processing time	86*	80	65*	54

\* Statistically significant difference compared to the current process.

*"I was very surprised and pleased that my claim was handled so quickly."*

*"Thought the new system was supposed to be faster but it wasn't."*

- Survey respondents were asked to rate the decision notice in terms of the clarity of the reason for the decision and the explanation of the appeal rights. As for most other aspects of service, DCM respondents gave significantly higher ratings than current process respondents for both items. This was true for both awards and denials and despite the fact that the notice language was not different for DCM cases.

SATISFACTION WITH NOTICE CLARITY				
E/VG/G RATINGS	AWARDS		DENIALS	
	DCM	INITIAL DI	DCM	INITIAL DI
Reason for decision	94%*	89%	64%*	46%
Appeal rights	98*	95	86*	68

\* Statistically significant difference compared to the current process.

Those respondents who rated the clarity of the notice fair, poor or very poor were asked to explain why. In both surveys, the most frequent reason behind the low ratings of denied respondents was disagreement with the decision. However, in DCM, the percentage of respondents (36 percent) who said they disagreed with the decision was significantly lower than in the Initial DI survey (50 percent). This seems to indicate that getting clearer explanations of the process from the same employee is having a positive impact on claimant perceptions.

*"Despite my personal outcome in filing, I believe the actual process works very well."*

## TAB A

**DISABILITY CLAIM MANAGER (DCM)  
PHASE II SATISFACTION SURVEY  
ANNOTATED QUESTIONNAIRE**

**Appointments**

1. How would you rate how soon you could get an appointment for your interview?  
Would you say it was:

AWARDS			DENIALS	
DCM (R = 326)	INITIAL DI (R = 443)		DCM (R = 275)	INITIAL DI (R = 235)
29% <sup>s/x</sup>	39% <sup>s</sup>	Excludes "Don't remember"	17% <sup>x</sup>	19%
43 <sup>s/x</sup>	30	Excellent	25	27
23 <sup>x</sup>	24	Very good	44	45
95 <sup>x</sup>	93	Good	86	91
4 <sup>x</sup>	5	Excellent /Very good/Good	10	6
1 <sup>x</sup>	1	Fair	4	2
0	1	Poor	*	1
5 <sup>x</sup>	7	Very poor	14	9
		Fair/Poor/Very poor		

\* Less than one percent

<sup>s</sup> Statistically significant difference between DCM awards and current process awards<sup>x</sup> Statistically significant difference within DCM between awards and denials

2. How would you rate the convenience of the day and time of your appointment? Would you say it was: *(Select only one. Read rating scale ONLY.)*

AWARDS			DENIALS	
DCM (R = 331)	INITIAL DI (R = 429)		DCM (R = 279)	INITIAL DI (R = 226)
32% <sup>s/x</sup>	42% <sup>s</sup>	Excludes "Don't remember"	22% <sup>x</sup>	20%
42 <sup>s/x</sup>	32	Excellent	32	30
23 <sup>x</sup>	21	Very good	37	42
97 <sup>x</sup>	95	Good	91	92
2 <sup>x</sup>	3	Excellent /Very good/Good	6	6
1	*	Fair	3	1
*	1	Poor	*	1
3 <sup>x</sup>	5	Very poor	9	8
		Fair/Poor/Very poor		

\* Less than one percent

<sup>s</sup> Statistically significant difference between DCM awards and current process awards<sup>x</sup> Statistically significant difference within DCM between awards and denials

*While most of the DCM applications were scheduled for telephone interviews, Initial DI survey respondents reported filing in person in about the same proportion as over the telephone. Therefore, statistical comparison of waiting times (question 3), which reflect both telephone and office times, would not be meaningful.*

3. On the day that you filed your application, how long did you have to wait for the Social Security interviewer? Count your wait from the time your appointment was supposed to start. (Select only one. Do NOT read responses.)

AWARDS		Excludes "Don't remember"	DENIALS	
DCM (R = 299)	INITIAL DI (R = 594)		DCM (R = 258)	INITIAL DI (R = 331)
74%	33%	0 to 5 minutes	72%	23%
10	24	6 to 10 minutes	10	25
8	22	11 to 20 minutes	9	24
2	12	21 to 30 minutes	4	16
4	6	31 to 60 minutes	2	7
2	3	More than 60 minutes	4	5

## Field Office Service

4. Did you complete your application over the telephone or in person?  
(Select only one. Do NOT read responses.)

AWARDS		Excludes "Don't remember"	DENIALS	
DCM (R = 337)	INITIAL DI (R = 736)		DCM (R = 289)	INITIAL DI (R = 419)
75% <sup>s</sup>	44% <sup>s</sup>	By telephone	77% <sup>w</sup>	43% <sup>w</sup>
25 <sup>s</sup>	42 <sup>s</sup>	In person at the office	23 <sup>w</sup>	41
NA	1	In person at other location	NA	3
NA	9	With someone other than an SSA employee	NA	5
NA	4	No interview took place	NA	8

<sup>s</sup> Statistically significant difference between DCM awards and current process awards

<sup>w</sup> Statistically significant difference between DCM denials and current process denials

5. Did you ever visit the office that was handling your application?  
(Select only one. Do NOT read responses.)



*Note: Question 5 was only answered by DCM respondents who said they had a telephone interview. To determine the total number of DCM respondents who visited the office, we combined the responses for question 4 and question 5 in the second chart below.*

### Telephone Interviews Only:

AWARDS		DENIALS
DCM (R = 254)	Excludes "Don't remember"	DCM (R = 226)
19%	Yes	13%
81	No	87

### Both Telephone and In-Person Interviews:

AWARDS		Excludes "Don't remember"	DENIALS	
DCM (R = 339)	INITIAL DI (R = 745)		DCM (R = 292)	INITIAL DI (R = 423)
39% <sup>s</sup>	51% <sup>s</sup>	Yes	33% <sup>w</sup>	42% <sup>w</sup>
61	49	No	67	58

<sup>s</sup> Statistically significant difference between DCM awards and current process awards

<sup>w</sup> Statistically significant difference between DCM denials and current process denials

### 6. Did you yourself ever call the office that was handling your application? (Select only one. Do NOT read responses.)

AWARDS		Excludes "Don't remember"	DENIALS	
DCM (R = 331)	INITIAL DI (R = 743)		DCM (R = 284)	INITIAL DI (R = 420)
63%	61%	Yes	61% <sup>w</sup>	52% <sup>w</sup>
37	39	No	39	48

<sup>w</sup> Statistically significant difference between DCM denials and current process denials



**7. How would you rate the phone service in terms of how quickly you were able to get through? Was the phone service: (Select only one. Read rating scale ONLY.)**

AWARDS			DENIALS	
DCM (R = 204)	INITIAL DI (R = 455)	Excludes "Don't remember"	DCM (R = 170)	INITIAL DI (R = 210)
21% <sup>x</sup>	23%	Excellent	7% <sup>x</sup>	10%
35 <sup>s</sup>	26 <sup>s</sup>	Very good	26	19
27 <sup>x</sup>	31	Good	40 <sup>x</sup>	40
83 <sup>x</sup>	80	Excellent /Very good/Good	73 <sup>x</sup>	69
10	8	Fair	7	12
5	7	Poor	10	11
2 <sup>x</sup>	5	Very poor	10 <sup>x</sup>	8
17 <sup>x</sup>	20	Fair/Poor/Very poor	27 <sup>x</sup>	31

<sup>s</sup> Statistically significant difference between DCM awards and current process awards

<sup>x</sup> Statistically significant difference within DCM between awards and denials

**7a. Why did you say it was fair, poor, or very poor?**  
(Record a brief summary of the claimant's response).

Hard to get through; lines are always busy; always had to leave a message; long wait on hold; calls not returned promptly or not at all.

**8. Did you ever call to speak to the interviewer who worked on your disability application and leave a message asking him or her to call you back?**  
(Select only one. Do NOT read responses.)

AWARDS			DENIALS	
DCM (R = 195)	INITIAL DI (R = 457)		DCM (R = 167)	INITIAL DI (R = 211)
68%	62%	Yes	61% <sup>w</sup>	47% <sup>w</sup>
32	38	No	39	53

<sup>w</sup> Statistically significant difference between DCM denials and current process denials

**9. How soon did the interviewer call you back? (Select only one. Do NOT read responses.)**

AWARDS			DENIALS	
DCM (R = 128)	INITIAL DI (R = 271)		DCM (R = 98)	INITIAL DI (R = 106)
50%	45%	The same day	48% <sup>w</sup>	27% <sup>w</sup>
30	28	The next day	26	26
14	12	More than a day later	18	24
6 <sup>s</sup>	15 <sup>s</sup>	Never called back	8 <sup>w</sup>	23 <sup>w</sup>

<sup>s</sup> Statistically significant difference between DCM awards and current process awards

<sup>w</sup> Statistically significant difference between DCM denials and current process denials

## How You Were Treated by the Interviewer

Now I would like you to think specifically about the service you received from the interviewer that worked with you.

10. Was the interviewer caring and helpful? Would you rate the treatment you received as: (Select only one. Read rating scale ONLY.)

AWARDS		Excludes "Don't remember"	DENIALS	
DCM (R = 341)	INITIAL DI (R = 733)		DCM (R = 288)	INITIAL DI (R = 420)
47% <sup>s/x</sup>	40% <sup>s</sup>	Excellent	24% <sup>x</sup>	22%
40 <sup>s</sup>	30 <sup>s</sup>	Very good	36 <sup>w</sup>	25 <sup>w</sup>
10 <sup>s/x</sup>	24 <sup>s</sup>	Good	28 <sup>x</sup>	35
97 <sup>s/x</sup>	94 <sup>s</sup>	Excellent /Very good/Good	88 <sup>wx</sup>	82 <sup>w</sup>
2 <sup>x</sup>	3	Fair	5 <sup>wx</sup>	12 <sup>w</sup>
1 <sup>x</sup>	1	Poor	6 <sup>x</sup>	3
*	2	Very poor	1	3
3 <sup>s/x</sup>	6 <sup>s</sup>	Fair/Poor/Very poor	12 <sup>wx</sup>	18 <sup>w</sup>

\* Less than one percent

<sup>s</sup> Statistically significant difference between DCM awards and current process awards

<sup>w</sup> Statistically significant difference between DCM denials and current process denials

<sup>x</sup> Statistically significant difference within DCM between awards and denials

- 10a. Why did you say it was fair, poor, or very poor?  
(Record a brief summary of the claimant's response).

Seemed not to care much about me; unsympathetic; not sensitive; didn't listen.

11. Was the interviewer courteous and respectful? Would you rate the interviewer's attitude as: (Select only one. Read rating scale ONLY.)

AWARDS		Excludes "Don't remember"	DENIALS	
DCM (R = 341)	INITIAL DI (R = 726)		DCM (R = 291)	INITIAL DI (R = 419)
53% <sup>s/x</sup>	44% <sup>s</sup>	Excellent	28% <sup>x</sup>	22%
34	29	Very good	37 <sup>w</sup>	24 <sup>w</sup>
11 <sup>s/x</sup>	21 <sup>s</sup>	Good	29 <sup>wx</sup>	37 <sup>w</sup>
98 <sup>s/x</sup>	94 <sup>s</sup>	Excellent /Very good/Good	94 <sup>wx</sup>	83 <sup>w</sup>
2	3	Fair	1 <sup>wx</sup>	11 <sup>w</sup>
* <sup>x</sup>	2	Poor	3	3
0	1	Very poor	2	3
2 <sup>s/x</sup>	6 <sup>s</sup>	Fair/Poor/Very poor	6 <sup>x</sup>	17 <sup>w</sup>

\* Less than one percent

<sup>s</sup> Statistically significant difference between DCM awards and current process awards

<sup>w</sup> Statistically significant difference between DCM denials and current process denials

<sup>x</sup> Statistically significant difference within DCM between awards and denials



**11a. Why did you say it was fair, poor, or very poor?***(Record a brief summary of the claimant's response)**Talked down to me; condescending; bad attitude; rude.***12. How would you rate how well the interviewer knew his or her job? Would you say the interviewer's knowledge was: (Select only one. Read rating scale ONLY.)**

AWARDS		Excludes "Don't remember"	DENIALS	
DCM (R = 337)	INITIAL DI (R = 724)		DCM (R = 272)	INITIAL DI (R = 416)
47% <sup>x</sup>	42%	Excellent	25% <sup>x</sup>	22%
38 <sup>s</sup>	28 <sup>s</sup>	Very good	39 <sup>w</sup>	27 <sup>w</sup>
13 <sup>s/x</sup>	24 <sup>s</sup>	Good	32 <sup>x</sup>	37
98 <sup>s</sup>	94 <sup>s</sup>	<u>Excellent /Very good/Good</u>	96 <sup>w</sup>	85 <sup>w</sup>
2	3	Fair	2 <sup>w</sup>	9 <sup>w</sup>
*	2	Poor	2	3
0	1	Very poor	0	3
2 <sup>s</sup>	6 <sup>s</sup>	<u>Fair/Poor/Very poor</u>	4 <sup>w</sup>	15 <sup>w</sup>

\* Less than one percent

<sup>s</sup> Statistically significant difference between DCM awards and current process awards<sup>w</sup> Statistically significant difference between DCM denials and current process denials<sup>x</sup> Statistically significant difference within DCM between awards and denials**12a. Why did you say it was fair, poor, or very poor?***(Record a brief summary of the claimant's response).**Didn't seem to know what they were doing; gave misinformation.***13. How would you rate the amount of time the interviewer spent with you? Would you say it was: (Select only one. Read rating scale ONLY.)**

AWARDS		Excludes "Don't remember"	DENIALS	
DCM (R = 337)	INITIAL DI (R = 726)		DCM (R = 278)	INITIAL DI (R = 417)
37% <sup>x</sup>	41%	Excellent	22% <sup>x</sup>	18%
41 <sup>s/x</sup>	30 <sup>s</sup>	Very good	27 <sup>x</sup>	23
20 <sup>x</sup>	23	Good	39 <sup>x</sup>	41
98 <sup>s/x</sup>	94 <sup>s</sup>	<u>Excellent /Very good/Good</u>	88 <sup>wx</sup>	82 <sup>w</sup>
2 <sup>x</sup>	2	Fair	7 <sup>x</sup>	9
* <sup>x</sup>	2	Poor	5 <sup>x</sup>	5
*	2	Very poor	*	4
2 <sup>s/x</sup>	6 <sup>s</sup>	<u>Fair/Poor/Very poor</u>	12 <sup>wx</sup>	18 <sup>w</sup>

\* Less than one percent

<sup>s</sup> Statistically significant difference between DCM awards and current process awards<sup>w</sup> Statistically significant difference between DCM denials and current process denials<sup>x</sup> Statistically significant difference within DCM between awards and denials

**13a. Why did you say it was fair, poor, or very poor?***(Record a brief summary of the claimant's response)**Rushed through everything; didn't spend much time with me.***How Well the Interviewer Explained Things to You**

Now I'd like you to think about how clearly the interviewer explained what you needed to know when you filed your disability application.

**14. Did the interviewer explain to you that he or she would be the person making the decision on your disability claim? (Select only one. Do NOT read responses.)**

AWARDS		DENIALS
DCM (R = 278)	Excludes "Don't remember"	DCM (R = 250)
43% <sup>x</sup>	Yes	25% <sup>x</sup>
57	No	75

<sup>x</sup> Statistically significant difference within DCM between awards and denials**15. How well did the interviewer explain what information and/or documents you needed to file your application? Would you rate the explanation as:**  
*(Select only one. Read rating scale ONLY.)*

AWARDS			DENIALS	
DCM (R = 334)	INITIAL DI (R = 735)	Excludes "Don't remember"	DCM (R = 275)	INITIAL DI (R = 418)
34% <sup>x</sup>	39%	Excellent	17% <sup>x</sup>	22%
46 <sup>s/x</sup>	31 <sup>s</sup>	Very good	34 <sup>wx</sup>	26 <sup>w</sup>
19 <sup>s/x</sup>	26 <sup>s</sup>	Good	38 <sup>x</sup>	36
99 <sup>s/x</sup>	96 <sup>s</sup>	Excellent /Very good/Good	89 <sup>x</sup>	84
1 <sup>x</sup>	2	Fair	5 <sup>wx</sup>	10 <sup>w</sup>
* <sup>x</sup>	1	Poor	4 <sup>x</sup>	4
0	1	Very poor	2	2
1 <sup>s/x</sup>	4 <sup>s</sup>	Fair/Poor/Very poor	11 <sup>x</sup>	16

\* Less than one percent

<sup>s</sup> Statistically significant difference between DCM awards and current process awards<sup>w</sup> Statistically significant difference between DCM denials and current process denials<sup>x</sup> Statistically significant difference within DCM between awards and denials**15a. Why did you rate the interviewer's explanation as fair, poor, or very poor?**  
*(Record a brief summary of the claimant's response).**Explanation not given or incomplete; explanation not clear or confusing.*



**16. How well did the interviewer explain Social Security's rules and requirements for getting disability benefits? Would you rate the explanation as:**  
*(Select only one. Read rating scale ONLY.)*

AWARDS		Excludes "Don't remember"	DENIALS	
DCM (R = 314)	INITIAL DI (R = 729)		DCM (R = 251)	INITIAL DI (R = 415)
30% <sup>x</sup>	36%	Excellent	11% <sup>x</sup>	16%
44 <sup>s/x</sup>	32 <sup>s</sup>	Very good	30 <sup>wx</sup>	22 <sup>w</sup>
21 <sup>x</sup>	26	Good	36 <sup>x</sup>	34
95 <sup>x</sup>	94	Excellent /Very good/Good	77 <sup>x</sup>	72
3 <sup>x</sup>	3	Fair	10 <sup>x</sup>	12
1 <sup>x</sup>	2	Poor	7 <sup>x</sup>	9
1 <sup>x</sup>	1	Very poor	6 <sup>x</sup>	7
5 <sup>x</sup>	6	Fair/Poor/Very poor	23 <sup>x</sup>	28

<sup>s</sup> Statistically significant difference between DCM awards and current process awards

<sup>w</sup> Statistically significant difference between DCM denials and current process denials

<sup>x</sup> Statistically significant difference within DCM between awards and denials

**16a. Why did you rate the interviewer's explanation as fair, poor, or very poor?**  
*(Record a brief summary of the claimant's response).*

*Rules not explained; explanation not clear.*

**17. How well did the interviewer explain the steps in the application process; for example, how your medical condition was evaluated? Would you rate the explanation as:**  
*(Select only one. Read rating scale ONLY.)*

AWARDS		Excludes "Don't remember"	DENIALS	
DCM (R = 300)	INITIAL DI (R = 729)		DCM (R = 257)	INITIAL DI (R = 409)
26% <sup>s/x</sup>	34% <sup>s</sup>	Excellent	9% <sup>x</sup>	13%
41 <sup>s/x</sup>	28 <sup>s</sup>	Very good	21 <sup>x</sup>	15
27 <sup>x</sup>	29	Good	41 <sup>wx</sup>	32 <sup>w</sup>
94 <sup>x</sup>	91	Excellent /Very good/Good	71 <sup>wx</sup>	60 <sup>w</sup>
3 <sup>x</sup>	3	Fair	10 <sup>x</sup>	14
2 <sup>x</sup>	3	Poor	11 <sup>x</sup>	13
1 <sup>x</sup>	3	Very poor	8 <sup>wx</sup>	13 <sup>w</sup>
6 <sup>x</sup>	9	Fair/Poor/Very poor	29 <sup>wx</sup>	40 <sup>w</sup>

<sup>s</sup> Statistically significant difference between DCM awards and current process awards

<sup>w</sup> Statistically significant difference between DCM denials and current process denials

<sup>x</sup> Statistically significant difference within DCM between awards and denials

**17a. Why did you rate the interviewer's explanation as fair, poor, or very poor?**  
*(Record a brief summary of the claimant's response).*

*No explanation given; explanation incomplete or confusing.*

*If denial, ~~skip~~ skip to question 20*

- 18. How well did the interviewer explain what changes you had to report to Social Security? Would you rate the explanation as:**  
*(Select only one. Read rating scale ONLY.)*

AWARDS		
DCM (R = 302)	INITIAL DI (R = 703)	
26%	31%	Excludes "Don't remember"
44 <sup>s</sup>	30 <sup>s</sup>	Excellent
25 <sup>s</sup>	33 <sup>s</sup>	Very good
95	94	Good
2	2	Excellent /Very good/Good
1	2	Fair
2	2	Poor
5	6	Very poor
		Fair/Poor/Very poor

<sup>s</sup> Statistically significant difference between DCM awards and current process awards

- 18a. Why did you rate the interviewer's explanation as fair, poor, or very poor?**  
*(Record a brief summary of the claimant's response).*

*No explanation given by interviewer.*

- 19. How well did the interviewer explain what would happen to your benefits if you went to work? Would you rate the explanation as:**  
*(Select only one. Read rating scale ONLY.)*

AWARDS		
DCM (R = 288)	INITIAL DI (R = 695)	
25%	30%	Excludes "Don't remember"
39 <sup>s</sup>	27 <sup>s</sup>	Excellent
28	32	Very good
92	89	Good
2	5	Excellent /Very good/Good
4	3	Fair
2	3	Poor
8	11	Very poor
		Fair/Poor/Very poor

<sup>s</sup> Statistically significant difference between DCM awards and current process awards

- 19a. Why did you rate the interviewer's explanation as fair, poor, or very poor?**  
*(Record a brief summary of the claimant's response).*

*Did not explain; explanation unclear.*

## Completing Forms for Your Application

When you filed your application for disability benefits, Social Security asked you for information about your medical condition and the doctors, clinics and hospitals who have treated you.

20. Did Social Security give you or send you any forms to fill out yourself about your medical information, your doctors' names and addresses, and dates you were in the hospital? (Select only one. Do NOT read responses.)

AWARDS		Excludes "Don't remember"	DENIALS	
DCM (R = 321)	INITIAL DI (R = 741)		DCM (R = 282)	INITIAL DI (R = 421)
93% <sup>s</sup>	84% <sup>s</sup>	Yes	90%	89%
7	16	No	10	11

<sup>s</sup> Statistically significant difference between DCM awards and current process awards

21. Did you complete the forms entirely yourself or did a Social Security employee or someone else help you understand the forms and fill them out? (Select only one.)

AWARDS		Excludes "Don't remember"	DENIALS	
DCM (R = 299)	INITIAL DI (R = 620)		DCM (R = 255)	INITIAL DI (R = 374)
60% <sup>s</sup>	45% <sup>s</sup>	I completed them entirely myself	63% <sup>w</sup>	54% <sup>w</sup>
6 <sup>s</sup>	13 <sup>s</sup>	An SSA employee helped me	6	9
32	32	Someone else helped me	31	30
2 <sup>s</sup>	10 <sup>s</sup>	Both an SSA employee and someone else helped me	* <sup>w</sup>	8 <sup>w</sup>

\* Less than one percent

<sup>s</sup> Statistically significant difference between DCM awards and current process awards

<sup>w</sup> Statistically significant difference between DCM denials and current process denials

## Obtaining Medical Records for Your Application

22. Now I'd like to ask you questions about your medical records. When you filed your application, did you request your own medical reports from your doctors or hospitals for Social Security? (Select only one. Do NOT read responses.)

AWARDS		Excludes "Don't remember"	DENIALS	
DCM (R = 327)	INITIAL DI (R = 738)		DCM (R = 288)	INITIAL DI (R = 420)
24% <sup>s</sup>	39% <sup>s</sup>	Yes	17% <sup>w</sup>	38% <sup>w</sup>
76	61	No	83	62

<sup>s</sup> Statistically significant difference between DCM awards and current process awards

<sup>w</sup> Statistically significant difference between DCM denials and current process denials



**23. How would you rate how easy or hard it was to get your own medical reports? Was it:**  
(Select only one. Read rating scale ONLY.)

AWARDS		Excludes "Don't remember"	DENIALS	
DCM (R = 78)	INITIAL DI (R = 281)		DCM (R = 49)	INITIAL DI (R = 148)
30%	29%	Very easy	24%	19%
50 <sup>s</sup>	37 <sup>s</sup>	Easy	37	30
80 <sup>s/x</sup>	66 <sup>s</sup>	Very easy/Easy	61 <sup>x</sup>	49
15	23	Neither easy nor hard	16	24
3 <sup>x</sup>	9	Hard	15 <sup>x</sup>	15
2	2	Very hard	8	12
5 <sup>x</sup>	11	Hard/Very hard	23 <sup>x</sup>	27

<sup>s</sup> Statistically significant difference between DCM awards and current process awards

<sup>x</sup> Statistically significant difference within DCM between awards and denials

**23a. Why did you say getting your own medical reports was hard or very hard?**  
(Record a brief summary of claimant's response.)

*Took a long time; had to follow up with doctors; it was a lot of paperwork.*

**24. Did you have to pay for the medical reports? (Select only one. Do NOT read responses.)**

AWARDS		Excludes "Don't remember"	DENIALS	
DCM (R = 76)	INITIAL DI (R = 279)		DCM (R = 48)	INITIAL DI (R = 151)
9% <sup>s/x</sup>	19% <sup>s</sup>	Yes	25% <sup>x</sup>	18%
91	81	No	75	82

<sup>s</sup> Statistically significant difference between DCM awards and current process awards

<sup>x</sup> Statistically significant difference within DCM between awards and denials

**Medical Examinations Requested by Social Security**

**25. Now I'd like to ask you questions about any medical examinations Social Security may have asked you to have. Did Social Security send you for an examination or test, either by your own doctor or a doctor they chose for you?**  
(Select only one. Do NOT read responses.)

AWARDS		Excludes "Don't remember"	DENIALS	
DCM (R = 332)	INITIAL DI (R = 738)		DCM (R = 292)	INITIAL DI (R = 420)
6% <sup>s/x</sup>	10% <sup>s</sup>	Yes, to my own doctor	2% <sup>wx</sup>	6% <sup>w</sup>
33 <sup>s/x</sup>	52 <sup>s</sup>	Yes, to a Social Security doctor	48 <sup>wx</sup>	59 <sup>w</sup>
61 <sup>s/x</sup>	38 <sup>s</sup>	No	50 <sup>wx</sup>	35 <sup>w</sup>

<sup>s</sup> Statistically significant difference between DCM awards and current process awards

<sup>w</sup> Statistically significant difference between DCM denials and current process denials

<sup>x</sup> Statistically significant difference within DCM between awards and denials



**26. Did you understand why you needed to see the doctor and what kind of examination or test the doctor was going to do? (Select only one. Do NOT read responses.)**

AWARDS		Excludes "Don't remember"	DENIALS	
DCM (R = 124)	INITIAL DI (R = 405)		DCM (R = 144)	INITIAL DI (R = 248)
95% <sup>x</sup>	90%	Yes	77% <sup>x</sup>	72%
5	10	No	23	28

<sup>x</sup> Statistically significant difference within DCM between awards and denials

**26a. Can you tell me what you didn't understand about the appointment with the doctor? (Record a brief summary of the claimant's response.)**

*Wasn't told the purpose of the visit or what tests might be needed.*

**27. Did you have any problems getting to the examination? (Select only one. Do NOT read responses.)**

AWARDS		Excludes "Don't remember"	DENIALS	
DCM (R = 128)	INITIAL DI (R = 408)		DCM (R = 146)	INITIAL DI (R = 249)
13%	19%	Yes	17% <sup>w</sup>	28% <sup>w</sup>
87	81	No	83	72

<sup>w</sup> Statistically significant difference between DCM denials and current process denials

**28. What were the problems? (Select all that apply. Do NOT read responses.)**

AWARDS		Excludes "Don't remember"	DENIALS	
DCM (R = 16)	INITIAL DI (R = 82)		DCM (R = 25)	INITIAL DI (R = 71)
16%	25%	Doctor's office far away	21%	24%
4	7	Day and/or time of appointment not convenient	5	7
24	25	Have no transportation	26	33
4	3	No convenient parking	0	*
4	4	Directions unclear	9	3
28	32	Medical condition makes it hard for me to get around	16	25
20 <sup>s</sup>	4 <sup>s</sup>	Other	23 <sup>w</sup>	8 <sup>w</sup>

\* Less than one percent

<sup>s</sup> Statistically significant difference between DCM awards and current process awards

<sup>w</sup> Statistically significant difference between DCM denials and current process denials

**29. Overall, how would you rate the experience you had when you were examined by the doctor Social Security sent you to? Was it: (Select only one. Read rating scale ONLY.)**

AWARDS			DENIALS	
DCM (R = 125)	INITIAL DI (R = 389)		DCM (R = 138)	INITIAL DI (R = 231)
21% <sup>x</sup>	28%	Excludes "Don't remember"	9% <sup>x</sup>	10%
41 <sup>s/x</sup>	26 <sup>s</sup>	Excellent	12 <sup>x</sup>	11
30	34	Very good	34	33
92 <sup>x</sup>	88	Good	54 <sup>x</sup>	54
5 <sup>x</sup>	5	Excellent /Very good/Good	15 <sup>x</sup>	19
2 <sup>x</sup>	3	Fair	20 <sup>x</sup>	13
1 <sup>x</sup>	4	Poor	11 <sup>x</sup>	14
8 <sup>x</sup>	12	Very poor	46 <sup>x</sup>	46
		Fair/Poor/Very poor		

<sup>s</sup> Statistically significant difference between DCM awards and current process awards

<sup>x</sup> Statistically significant difference within DCM between awards and denials

**29a. Why did you say it was fair, poor, or very poor?**  
(Record a brief summary of the claimant's response.)

*Exam was not thorough; doctor refuted their disability; doctor was incompetent;  
wrong kind of doctor chosen for their condition.*

## Time It Took Social Security to Process Your Application

Now I'd like you to think about the entire application process from beginning to end.

**30. How would you rate the number of times you had to contact Social Security about your application? Would you say it was: (Select only one. Read rating scale ONLY.)**

AWARDS			DENIALS	
DCM (R = 329)	INITIAL DI (R = 718)		DCM (R = 259)	INITIAL DI (R = 404)
28% <sup>x</sup>	27%	Excludes "Don't remember"	11% <sup>x</sup>	9%
36 <sup>s/x</sup>	27 <sup>s</sup>	Excellent	22 <sup>wx</sup>	14 <sup>w</sup>
30 <sup>x</sup>	33	Very good	47 <sup>wx</sup>	38 <sup>w</sup>
94 <sup>s/x</sup>	87 <sup>s</sup>	Good	80 <sup>wx</sup>	61 <sup>w</sup>
3 <sup>x</sup>	7	Excellent /Very good/Good	9 <sup>x</sup>	20
2 <sup>x</sup>	4	Fair	7 <sup>x</sup>	11
1 <sup>x</sup>	2	Poor	4 <sup>x</sup>	8
6 <sup>s/x</sup>	13 <sup>s</sup>	Very poor	20 <sup>wx</sup>	39 <sup>w</sup>
		Fair/Poor/Very poor		

<sup>s</sup> Statistically significant difference between DCM awards and current process awards

<sup>w</sup> Statistically significant difference between DCM denials and current process denials

<sup>x</sup> Statistically significant difference within DCM between awards and denials



- Differences in filing methods may have produced some of the statistically significant outcomes in completion of medical forms<sup>13</sup>. DCM participants, especially awardees, were more often asked and able to complete their own medical forms, and less often requested their own medical evidence. *(See Appendix V for detailed survey results.)*

Shown below are the customer satisfaction results of the DCM Phase 2 customer survey as compared to the customer satisfaction in the current disability process, as measured by the fiscal year 2000 Market Measurement Program (MMP) customer segment survey of initial disability (DI) applicants.

Survey results are displayed in two categories:

- Claimants who rated service as excellent (E); and
- Claimants who rated service as excellent, very good, or good (E/VG/G)

Question	DCM E	MMP E	DCM E/VG/G	MMP E/VG/G
Adjudicator explained rules/requirements: claim allowed	30%	36%	95%	94%
Adjudicator explained rules/requirements: claim denied	11%	16%	77%	72%
Adjudicator caring/helpful: claim allowed	47%*	40%	97%*	94%
Adjudicator caring/helpful: claim denied	24%	22%	88%*	82%
Adjudicator courteous/respectful: claim allowed	53%*	44%	98%*	94%
Adjudicator courteous/respectful: claim denied	28%	22%	94%*	83%
Adjudicator job knowledge: claim allowed	47%	42%	98%*	94%
Adjudicator job knowledge: claim denied	25%	22%	96%*	85%
Amount of time spent with claimant: claim allowed	37%	41%	98%*	94%
Amount of time spent with claimant: claim denied	22%	18%	88%*	82%
How long it took to handle application: claim allowed	24%	26%	86%*	80%
How long it took to handle application: claim denied	7%	8%	65%*	54%
Clear notice with reason: claim allowed	25%*	34%	94%*	89%
Clear notice with reason: claim denied	7%*	7%	64%*	46%
<b>Overall Service: claim allowed</b>	<b>38%*</b>	<b>37%</b>	<b>94%</b>	<b>91%</b>
<b>Overall Service: claim denied</b>	<b>8%</b>	<b>8%</b>	<b>68%*</b>	<b>55%</b>

\*Statistically significant difference

#### Overall Rating:

Awarded respondents in both surveys were similarly satisfied with SSA service overall when combining responses of good through excellent. When looking at excellent respondents only, awarded claimants in the DCM group rated overall service better.

<sup>13</sup> See Appendix V, questions 20 through 24 for a description of medical forms.

Aggregated denied respondents rated the DCM process better overall than that of their counterparts in the current process.

*Claimant satisfaction with employee attributes:*

Both awarded and denied respondents were significantly more satisfied with all aspects of DCM employee performance.

*Claimant satisfaction with processing time, and clarity of explanations and notices:*

DCM respondents were much more satisfied with processing time, explanation of documents needed to file and notice clarity.

## 6. Employee Job Satisfaction

**Evaluation Question:** *Do DCMs report a higher level of job satisfaction as compared to their prior positions?*

**Summary Results:** Based on OWA Phase 2 survey results<sup>14</sup> of DCM job satisfaction, both federal and state DCMs indicated significant improvements in job satisfaction relative to their prior positions. These results are consistent with Phase 1.

**Evaluation Question:** *Is the level of DCM job satisfaction observed in Phase 1 maintained over time?*

**Summary Results:** Comparing OWA survey results from Phase 1 (vs.) Phase 2, there were no significant changes in DCM job satisfaction. However, federal DCM job satisfaction decreased slightly during Phase 2. Conversely, state DCM job satisfaction increased slightly.

### Methodology:

During Phase 1 OWA worked with Lewin and DPRT to develop questionnaires and surveyed all of the test participants to determine if they preferred the DCM job to their prior CR/DE position<sup>15</sup>. Survey topics included: levels of DCM job comfort, job satisfaction, reactions to training, mentoring effectiveness, and learning curves.

Based on the Lewin Group recommendations only those DCMs and site coordinators/managers who participated in Phase 1 were surveyed in Phase 2<sup>16</sup>. Per Lewin the survey was modified to include only questions relevant to Phase 2. The survey was mailed to the participants in May 2000. The results were evaluated and compared, then assessed for overall job satisfaction.

<sup>14</sup> Reference appendix VI, "DCM EVALUATION- PHASE 2, EMPLOYEE/SITE COORDINATOR/MANAGER SURVEY RESULTS", Office of Workforce Analysis, July 2000

<sup>15</sup> Response rate for DCMs on the Phase 1 survey was 89.5% (188 of 210)

<sup>16</sup> Response rate for DCMs on the Phase 2 survey was 89.7% (157 of 175)



**Results:**

The following table reflects responses to the specific question asked in the surveys, *"Compared to my work as a DE/CR working as a DCM has impacted my job satisfaction as follows:"*

	FDCM		SDCM		COMBINED	
	PHASE 1	PHASE 2	PHASE 1	PHASE 2	PHASE 1	PHASE 2
IMPROVED	85.6%	83.7%	79.7%	82.6%	82.4%	83.1%
NO IMPACT	7.2%	4.7%	4.8%	4.3%	6.0%	4.5%
DECREASED	7.2%	11.6%	15.4%	13.0%	11.5%	12.3%

The most frequently cited reasons for increased job satisfaction were:

- Control of the case from receipt to clearance
- Increased claimant interaction
- Increased job knowledge
- Better customer service (particularly for terminally ill cases)
- FDCMs also cited their increase in pay

The most frequently cited reasons for dissatisfaction by FDCMs were:

- Increased workload expectations
- Lack of direct access to medical consultants
- Need to catch-up on interviews lost during periods of leave
- Uncertainty regarding the test duration

The most frequently cited reasons for dissatisfaction by SDCMs were:

- Need to rely on federal employees to trigger cases
- SDCM and FDCM pay discrepancies
- Lack of clerical support
- Lack of state management support

The OWA report indicates several of the reasons for dissatisfaction were not related to the DCM process but to..." structural/environmental issues (such as legal constraints, site management and availability of support)..." Other impacts possibly affecting the level of DCM job satisfaction for FDCMs included the uncertainty regarding the DCM test duration and the impacts of long-term travel status.

## 7. Support Staff Assistance

**Evaluation Question:** *What types of support staff (clerical/paraprofessional), if any, are needed by DCMs?*

**Summary Results:** Based upon OWA survey results, both DCMs and site coordinators (SCs) did not perceive the need for paraprofessional type support. Both believed the DCM would be better served by clerical support. These survey results were supported by anecdotal information obtained during site visits.

### Methodology:

OWA worked with Lewin and DPRT to develop survey questionnaires for DCM test participants. As part of the survey questions, DCMs were asked about what type of support functions were most important to the DCM process.

### Background:

When the DCM test was originally envisioned, it was perceived that certain technology enablers would be in place, limiting the need for clerical support. Since the DCM test was conducted before the development of this support, a paraprofessional position (the CSS) was created to provide support to the DCM similar to that provided to DEs in the DDS. In addition, the CSS was expected to assist with non-disability (FO) workloads such as auxiliary claims, representative payee actions, etc.

Due to the manner in which CSS staff was assigned to the test, and the varied use of this staff, there was no valid way to separate CSS support from the DCM test. Work clearances completed by CSSs could not separately be captured. CSSs comprised 20 percent of the total staff hours; however, less than 2 percent of the work credits captured by the DCM sites would have been performed solely by CSSs. Other clerical work performed by CSSs was not measured (e.g., scheduling appointments, following up on evidence, etc.).

The survey asked the DCMs and SCs to list:

- The most important functions claims support specialists (CSS) or support personnel perform;
- The additional duties that could/should be assigned to the CSS/support personnel to make DCMs more productive.

Information gathered during site visits and survey responses support the conclusion that DCMs had greater need for clerical support than paraprofessional support<sup>17</sup>.

<sup>17</sup> See Appendix VI, "DCM EVALUATION- PHASE 2, EMPLOYEE/SITE COORDINATOR/MANAGER SURVEY RESULTS", Office of Workforce Analysis, July 2000

## 8. DCM in the Prototype Process

**Evaluation Question:** *How do key outcomes for the DCM/Prototype model compare to those of the Prototype process, as represented by the control group?*

### Summary Results:

#### Accuracy of adjudication:

- Pre-Effectuation Review (PER): DCM/Prototype accuracy was comparable to the control group.
- Disability Quality Assurance (DQA): The sample size did not allow a statistically valid comparison.
- Non-Medical Accuracy: The sampling did not provide the data to conduct a separate assessment of Prototype.

#### Processing time:

- In total, DCM and control case processing times were comparable. The DCM processed medical denials more quickly than the control group. The control processed allowances more quickly.

#### Allowance Rates:

- Initial claim allowance rates were statistically comparable.
- The reconsideration process is not included in Prototype procedures.
- Claimants denied in the DCM group requested a hearing 14.2 percent more often than claimants in the control group, which is statistically significant. DCM claimants were allowed 0.8 percent more often as compared to the control group, which is not statistically significant. Though given the low volume of clearances and the high sampling variability ultimate allowance rate data has not yet stabilized.

Sufficient or separate data was not available to assess the following key issues under Prototype:

- Customer satisfaction
- Employee job satisfaction
- Productivity and cost

### Methodology:

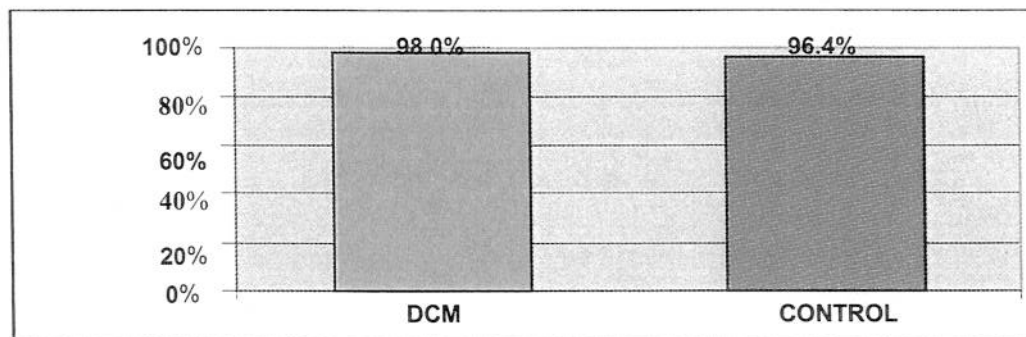
There were no differences in methodology for Prototype data collection. Where the data collected allowed a statistically valid comparison, Prototype data is being presented. The DCM/Prototype sites comprised less than 20% of the staffing and work produced in the DCM test.



**Results:**

- **Customer Satisfaction:** The OQA survey of customers did not isolate Prototype responses. No conclusions on DCM/Prototype could be made.
- **Employee Job Satisfaction:** The OWA Phase 2 survey did not isolate Prototype responses. No separate conclusions on DCM/Prototype could be made.
- **Accuracy of adjudication:**
  - Disability Quality Assurance (DQA) Review: No DCM/Prototype conclusions could be made since sample sizes were too small to allow a useful comparison. The sample sizes were 46 allowance and 65 denial cases reviewed for the DCM group and 38 allowance and 59 denial cases reviewed for the control group.
  - Pre-Effectuation Review (PER): The DCM and control PER accuracy rates were statistically comparable. The S.V. was 1.6%.

PER PROTOTYPE ACCURACY RATES

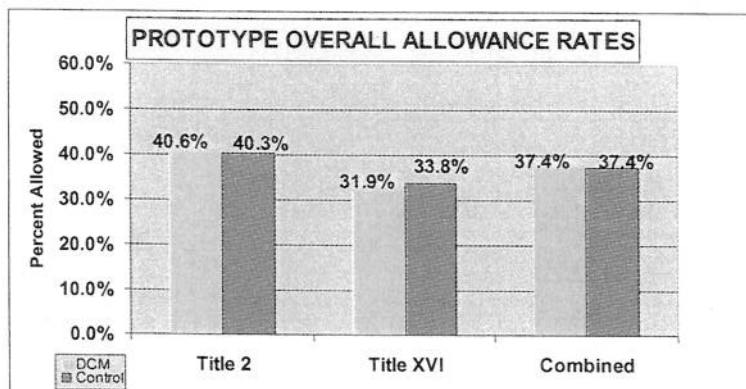
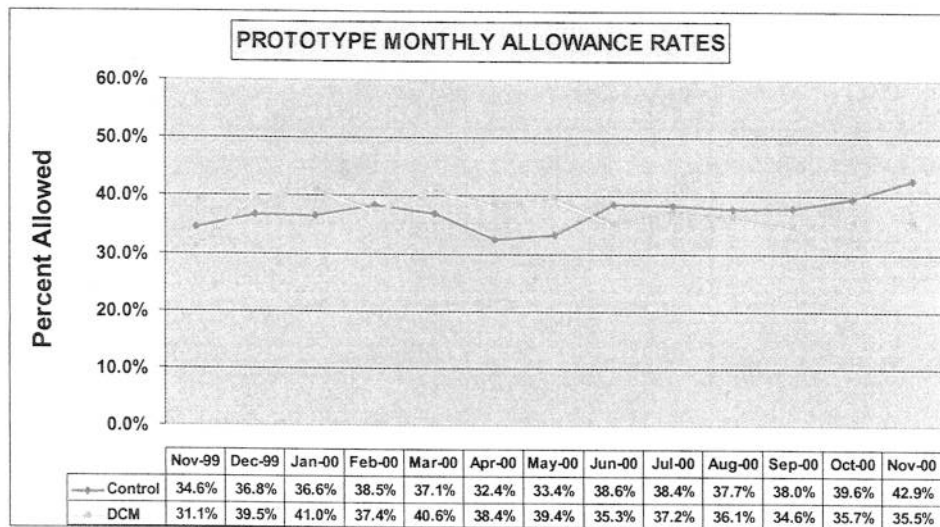
DCM vs. Control Group  
PER Prototype Accuracy Rates

	Number of Cases Reviewed	Number of Error Free Cases	Accuracy Rate
DCM	879	861	98.0%
Control Group	739	712	96.4%
Sampling Variability (S.V.)			1.6%
Difference in Accuracy Rates			1.6%

- Non-medical Accuracy: The OQA report on Title II and Title XVI non-medical accuracy did not delineate Prototype accuracy. No separate comparison for Prototype could be done in this area.

- **Allowance Rates:**

- **Initial Allowances:** The DCM and control group initial allowance rates were statistically comparable based upon an S.V. of 1.58%. DCMs processed 2,286 allowances from 6,108 claims and the control group processed 3,329 allowances from 8,912 claims. The monthly allowance rates were compiled base upon claim application months.

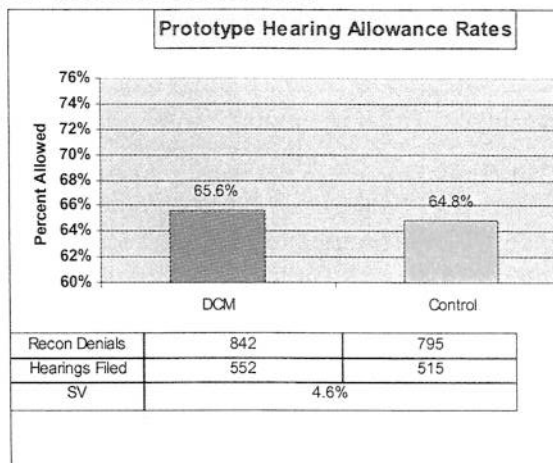
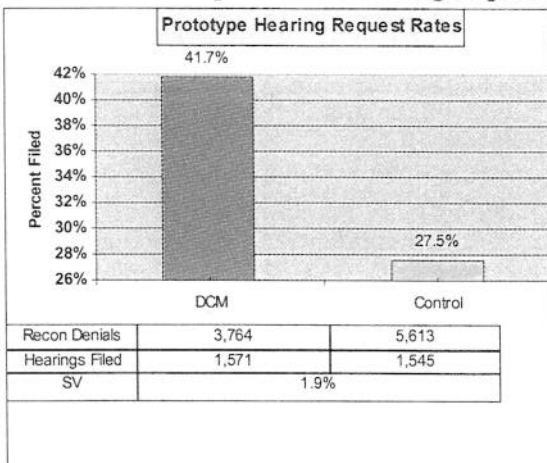


- The DCM processed a much larger ratio of their claims than did the control.
- DCM and control prototype allowance rates for Title II claims were statistically comparable. DCM and control prototype allowance rates for Title XVI claims were also statistically comparable.<sup>18</sup>
- The allowance rate trend line for prototype is similar to that of the current process. The DCM experienced a generally higher allowance rate for the first seven months of the test, and the control experienced a higher allowance rate for the last six months of the test.

<sup>18</sup> Title II S.V. for the difference of 2.0 PPT was computed using DCM 3,882 decisions, 1,576 allowances; Control 4,862 decisions, 1,960 allowances. The Title XVI S.V. for the difference of 2.4 PPT was computed using DCM 2,226 decisions, 710 allowances; Control 4,050 decisions, 1,369 allowances.

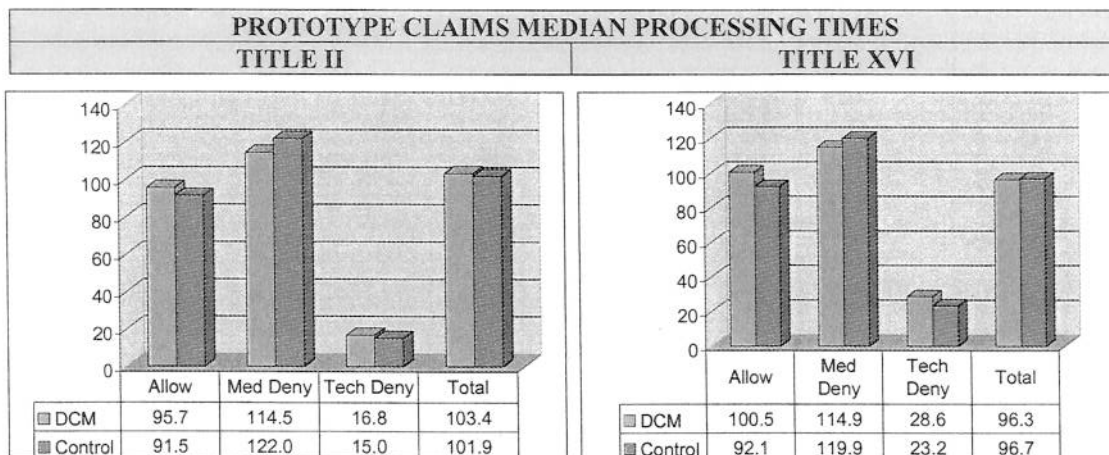


- **Reconsideration Rates:** The reconsideration process is not part of the prototype environment.
- **Hearing Rates:** The following graphs depict data through mid August 2001, and show the percent of hearing requests and decisional outcomes:

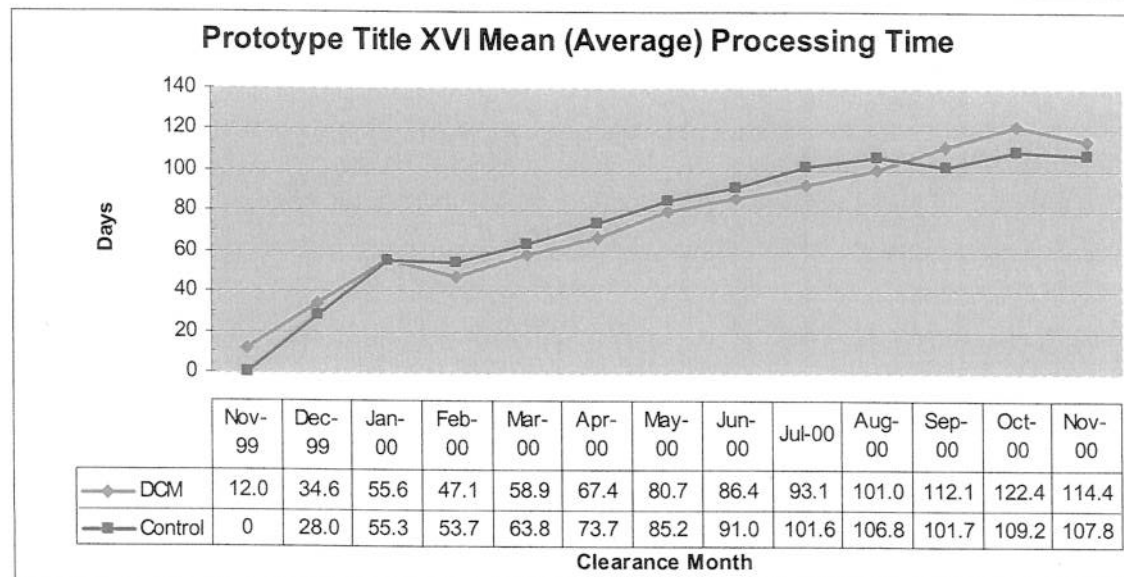
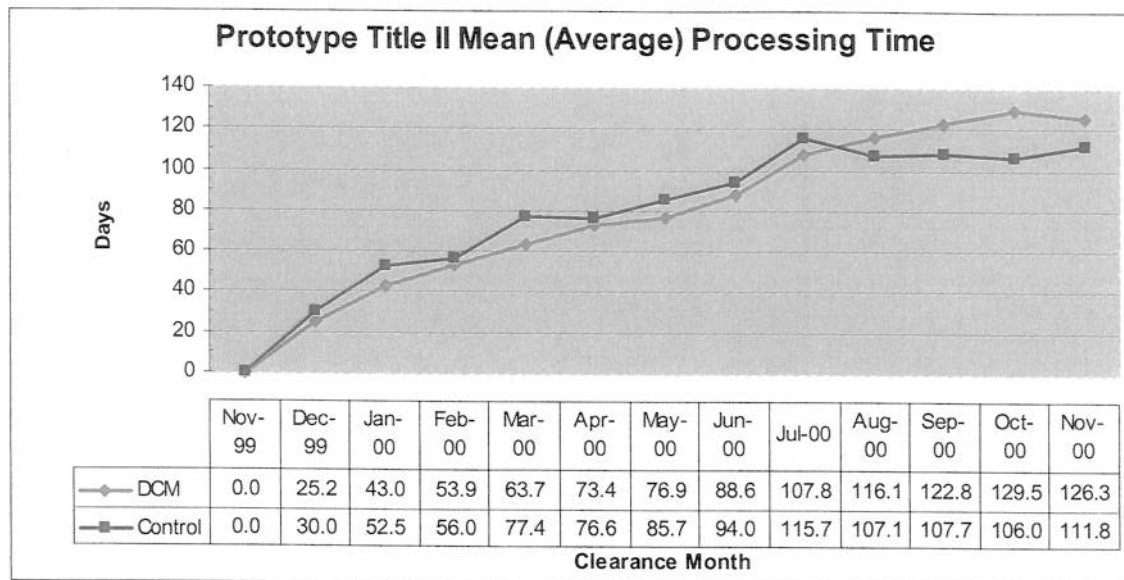


Claimants denied in the DCM group requested a hearing 14.2 percent more often than claimants in the control group. DCM claimants were allowed 0.8 percent more often as compared to the control group. Though given the low volume of clearances and the high sampling variability ultimate filing and allowance rate data has not yet stabilized.

- **Processing Time:**



Overall median processing times for both Title II and Title XVI Prototype claims were roughly comparable to the current process with one and a half days difference in Title II and less than one day difference in Title XVI. DCM medical denials were processed more quickly than control medical denials. Control allowances and technical denials were processed more quickly than the comparable DCM claims.



The above time lines show the DCM and Control average processing times maintained a relatively consistent relationship from February through July. The control then experienced a lower processing time for the remainder of the test period.

- **Productivity and Cost:** Productivity and cost in DCM/Prototype were not separately assessed.



## 9. Environmental Factors

**Evaluation Questions:** The Lewin Group suggested a series of questions related to the potential “fit” of a DCM process. Their specific questions were:

*How can the DCM be best configured to fit within the SSA/DDS environment? Are there feasible changes to that environment that would enable the DCM to become the approach to processing initial claims? Alternatively, should the DCM's role be limited to use in special situations that fit in the current environment and, if so, what situations?*

**Summary Results:** Lewin recognized that the Phase 2 Evaluation could not provide definitive answers to these questions. However, environmental factors were considered as part of the overall evaluation of the DCM process. These included the federal and state relationship, availability of technological enablers and other Agency initiatives that are currently underway.

### The Current Environment:

Throughout the redesign of the disability process, SSA reiterated its commitment to maintain the existing federal and state relationship. The infrastructure created by this relationship is a complex blend of federal and state government rules, regulations, systems and procedures. Each State's pay scale is different, and SSA has no authority or control over salaries for state DDS employees. While the DCM concept was tested in a federal/state environment, national implementation of the process, as tested, would require legislative change.

Legal parameters that would prevent full implementation of the DCM concept as tested are:

*Sections 205(b)(1) and 1631(c)(1)(A) of the Social Security Act (the Act) that require the Commissioner to make findings of fact and decisions as to the rights of any individual applying for payments under title II and title XVI of the Act. The effect of these sections is to preclude non-Federal employees from making the determination that an individual is or is not entitled to benefits. However, under sections 221(a)(1) and 1633(a) of the Act, the determination of whether or not an individual is under a disability shall be made by a State agency, notwithstanding any other provision of law, in any State which notifies the Commissioner that it wishes to make disability determinations. The Act provides only limited circumstances in which the Commissioner may perform the disability determination function for a class or classes of cases in a State without the State's consent.*

In order to test the DCM concept with both federal and state employees, SSA obtained agreements from State DDS Directors to allow federal employees to make disability determinations. The medical portion of the file was then co-signed by the FDCM and DDS program physician. The SDCMs were able to fully develop the non-medical aspects of the case; however, a SSA employee was required to finally adjudicate or “trigger” the case. Continuation of any form of the DCM process, without legislative change, would require ongoing collaborative agreements between SSA and State partners and federal “triggering” of benefit payments.

Anecdotal Feedback: Site reports and anecdotal information provided some good insights that could help determine a potential future role for some DCM-like skills or functions. These included:

- Specialized use: The Denver, Colorado combined DCM site was located in the downtown area, more easily accessible to homeless claimants. DCM outreach to homeless claimants could be particularly effective because of the DCM’s ability to identify source needs for both medical and non-medical aspects of the case, limiting the need for re-contacts. There is an added benefit in sites; such as is the case in Denver, where a consultative exam provider is located in the same building. There is a future potential for having DCM type position in offices where one-stop shopping could be accomplished.
- Potential for DCM to process other workloads: SSA could explore options to capitalize on the attributes of the DCM to expand to other types of disability workloads, tailored to local and regional needs, i.e. DCMs in flexible disability units or processing continuing disability reviews (CDRs). And, for example, the NY Regional Office has been working with the NJ DDS Director, management and the unions to continue to use the skills of the DCMs in the NJ sites.
- Technical Expert (TE) for Disability: The National Council of Social Security Managers Association (NCSSMA) suggested creating a specialized TE as an alternative position designed to provide flexible support to the disability program.

Broadened Agency Focus and Changing Claims Environment:

The DCM model was conceived more than five years ago as part of an aggressive plan to improve the disability claims process from initial level through final administrative appeal. Process support was expected from a set of enablers, which included advanced technology, process unification and a simplified disability decision methodology.

Five years later, SSA has moved forward in some areas and revised its timelines and goals in others. New initiatives, along with policy and procedural changes, have also impacted the claims environment. The potential of the DCM must be considered in the context of this changing environment, consistent with the goals and direction of the Agency. Activities impacting the disability claims environment include:



- Electronic claims environment: Technological support was viewed as a major factor in the viability of the original DCM concept. Integrated computer systems for all SSA components and DDSs were envisioned, as well as electronic medical evidence. Work is still underway to both define and achieve an electronic claims environment. Providing electronic services on the Internet is now a factor to incorporate in future plans.
- Simplified disability decisional methodology: The Agency used results from early research to modify its approach to changing the disability evaluation process. Instead of a radical change, as envisioned by the disability redesign plan, the current focus is on updating and revising the medical impairment listings to reflect the latest developments in medical and disability evaluation. Process unification has taken on greater significance and is requiring more time to process a case than originally expected.
- Return to Work Initiatives: The Agency has developed a number of new initiatives to encourage disability beneficiaries to return to the workforce, including the “Ticket to Work” program. Other initiatives involve—expanding the availability of employment and rehabilitation services, creating a model service delivery system, and helping youth with disabilities enter the workforce.
- New Agency positions: Structural and operational changes within field office and/or DDS environments must be factored into any decisions made relative to the disability program. Since release of the redesign plan, two new Agency positions have been established. The new positions are:
  - Employment Support Representative (ESR) as a field office expert for work incentive issues; and
  - Technical Expert (TE) as a focal point for ensuring high quality case processing and the point person for handling the most complex claims through adjudication.
- Changes in Legislation or Regulations: Some of the most sweeping regulations expected to impact the Agency relate to the Health Insurance Portability and Accountability Act (HIPAA). These regulations relate to the transmission and protection of individual’s medical information and will pose significant implications and challenges for the Agency.
- Disability process changes already underway: Currently, about 25% of the national disability claims workload is processed in DDS prototype locations; and, plans are underway for a phased rollout beginning in fiscal year 2003.

Additionally, the Agency continues to gain experience based on implementation of the Hearing Process Improvement Plan (HPI). Significant progress is needed to reach target goals for improvements expected through HPI implementation.

- (2010) Service Vision: SSA released the (2010) Service Vision as an approach to meet the dramatic demographic, human resource, and technology challenges facing the Agency in the coming decade. One of the service principles of the Vision is that customers complete their transactions at the first point of contact, eliminating hand-offs and more fully utilizing human resources through enabling technology.

All of these developments must be considered as decisions are made about the potential of the DCM.



## IV. Test Impacts and Issues:

The chart below provides a summary of impacts and issues, which must be considered in looking at environmental factors impacting the DCM process.

<i>Element</i>	<i>DCM Test</i>	<i>Current Process</i>	<i>Impact</i>
<b>Training</b>	<p>DCMs with medical experience (e.g., SDCMs) received a total of 15 weeks of training:</p> <ul style="list-style-type: none"> <li>- 4 weeks of T2 training plus 2 weeks OJT in a FO.</li> <li>- 6 weeks of T16 training, via IVT, plus 3 weeks OJT in a FO.</li> </ul> <p>Coaches with Title 2 and Title 16 expertise from FOs were assigned to assist state DCMs located in DDS sites for Phase 1.</p> <p>DCMs with programmatic experience (e.g., FDCMs) received a total of 30 weeks of training:</p> <ul style="list-style-type: none"> <li>- 8 weeks of traditional classroom medical training.</li> <li>- 5 ½ months of OJT in a DDS.</li> <li>- Additional cross-Title training was provided as needed.</li> </ul> <p>Coaches from the DDS were designated to assist the FDCMs while they were in the DDS and continued to be available to them as needed for Phase 1<sup>19</sup>.</p>	<p>New CRs are given 14 weeks of T2 training and 15 weeks of T16 training via IVT to become generalist CRs. Many CRs specialize in only T2 or T16 and only receive that portion of the training. Currently, CR trainees report to their permanent duty station and are generally assigned an on-site mentor to provide assistance on an as-needed basis.</p> <p>New DEs receive approximately 8 weeks of classroom training provided in the DDS. This is followed by a structured mentoring period on-site in the DDS. There are state to state variations in the content and length of training for DEs.</p>	<p>The CR T2 and T16 training packages were modified to focus mainly on initial disability claims related topics for the DCMs. Since T16 childhood claims weren't included in the DCM test, DCMs didn't receive the related programmatic or medical training. This reduced the length of both programmatic and medical training for DCMs. To train an incumbent CR or DE to be a DCM would take about 18 weeks of training followed by a period of mentoring while learning the job.</p> <p>Providing coaches (or mentors) for DCMs was a challenge. Since coaches had to travel to DCM sites from remote locations or DCMs trainees had to work in other locations where the coaches were, it was more complex to provide coaches for DCM trainees than mentors for CRs and/or DEs in the current process.</p>
<b>Systems Functionality</b>	<p>Establishing connectivity between DCM sites and DDS computer systems required special configurations. Once operational, minimal systems-related issues were reported, outside of</p>	<p>Cases going through the current process would not have experienced these connectivity-related problems.</p>	<p>There was negligible impact on productivity and/or processing time data related to systems functionality. Expansion of the DCM process could impact systems resources for connectivity.</p>

<sup>19</sup> The Training Review Group (TRG) published a report in December 1998, which provides some recommendations for refinements to the DCM training and coaching process.

<i>Element</i>	<i>DCM Test</i>	<i>Current Process</i>	<i>Impact</i>
	the norm.		
<b>Medical Consultant Access</b>	<p>MC accessibility was provided in various ways based on the process and resources of the parent DDS. Less than ¼ of DCM sites had on-site MC access every day. Other DCM sites provided access via:</p> <ul style="list-style-type: none"> <li>• Intermittent MC visits to the sites;</li> <li>• DCM visits to the MC;</li> <li>• Phone access; or</li> <li>• Written correspondence.</li> </ul>	There are state variances in the procedures for interacting with MC resources. These vary from written correspondence to MC appointments. Some MC support is available every day.	The differences in access to MC resources caused delays in some DCM sites. In about half of the sites there were differences between how the DCM and DE accessed MC support. Despite differences in access, processing time was faster.
<b>Workload Intake</b>	DCM sites had controlled intake of work and the ability to reduce intake if workloads were perceived to be unmanageable, thus creating an artificial workload environment.	The current process has minimal ability to limit the volume of incoming claims. Additionally, due to funding constraints imposed upon the DDS community nationally, states were forced to backlog a high volume of initial cases for FY' 2000 & 2001.	The DCM sites did not experience the same workload pressures as in the current process. Also, there is a potential impact on control case processing time due to the funding constraints imposed upon the DDSs.
<b>Case Movement</b>	For sites where MC access was not available on-site, cases had to be transported to the MC for consultation and /or clearance. Cases that required mailing added 1 to 4 days time. To circumvent US Postal mailing time, some site used the services of a special courier.	In the current process there is no external movement for MC sign-off. There is case mailing between field office and DDS locations; however, special couriers are not utilized.	<p>Delays caused by case mailing were not measured.</p> <p>The Agency is moving to an electronic environment, which could reduce or eliminate such delays.</p>
<b>Intake to the DDS Case Control System</b>	<p>About half of the DCM sites had the capability to directly input receipt of cases onto the DDS system.</p> <p>Other DCM sites routed case data through DDS intake units for input to the system, which delayed the initiation of medical record requests.</p>	In the current process, the DDS receipts the case into its case control system prior to routing the case to an examiner.	About a third of the DCM sites estimated some delay in initiating medical evidence requests because of the need to route the file for receipt into the case control system. While there was no time study for these activities, anecdotally, the delays ranged from 1 to 3 days.
<b>RFC Preparation</b>	<u>Physical RFCs</u> : Over half of the DCM sites reported that they prepared RFCs	Individual DDS policies regarding RFC preparation by DEs varied from state	Preparation of both mental and physical RFC forms varied, similar to the



<i>Element</i>	<i>DCM Test</i>	<i>Current Process</i>	<i>Impact</i>
	on most/all cases, and only one site reported preparing no physical RFCs. <u>Mental RFCs/PRTFs:</u> About 1/3 of the DCM sites reported that they prepared all mental RFCs/PRTFs. There was a mix of sites that either prepared some or no mental RFCs/PRTFs.	to state. The DCM sites generally mirrored their respective parent DDS's approach to preparing both physical and mental RFCs.	current process. (no net impact)
<b>Trigger of Title II/Title XVI Claims (for State DCMs)</b>	Due to the existing legal constraints, FO adjudicators needed to "trigger" claims completed by SDCMs. This was typically done remotely. The "triggering" process added negligible task time to each case. The delay caused from case movement was estimated at 2-5 days based upon anecdotal information.	There is no triggering issue.	Triggering claims was a cumbersome hand-off for the state DCMs, particularly when there was no on-site access to a federal adjudicator. Triggering time was not considered in test process calculations due to the negligible amount of task time added to each case. The impact is isolated to state sites. The delay caused from case movement was estimated at 2-5 days based upon anecdotal information. Legislative changes would be needed to eliminate this hand-off.
<b>Clerical/ Claims Support</b>	Claims Support Specialists (CSSs) were not evenly assigned.	Clerical support is different in the current process than the DCM. Where clerical support exists, it is based on other staffing, workload and resource considerations.	CSS time was factored into the DCM formula to compare DCM productivity & cost to the current process. There was no measure to determine specific support the CSSs provided. This support varied from site to site.
<b>Site Management</b>	The role and technical skills of each DCM Site Coordinator (SC) varied between sites. Some were devoted to the DCM unit full-time, while others spent only a fraction of their time on DCM related activities.	Each FO & DDS has a certain number of full-time managers and supervisors assigned based on the number of employees in any given location. Management is factored into the overhead equation to assess productivity in the current process.	DCM site coordinators were factored into the productivity calculation, based on the percent of time devoted to DCM units. The supervisory staff ratio for DCMs at 1:10.5 was higher than the field ratio.
<b>Employee Status</b>	Over half of the FDCMs were in long-term travel status away from home during the testing	Under normal circumstances, employees in FOs and DDSs are assigned to positions in	Attrition calculations differ between DDS DEs and FO CRs. DCM staff was very stable for the first

<i>Element</i>	<i>DCM Test</i>	<i>Current Process</i>	<i>Impact</i>
	timeframe. Anecdotal reports indicated that the temporary nature of the DCM test contributed to the overall attrition rate.	permanent duty stations.	9 months of the test experiencing 1.2 % attrition through May and 4.7 % through June. Overall FDCM attrition was about 18% (as compared to CR attrition at 7 ½%); and overall SDCM attrition was about 19% (as compared to DE attrition at 16 ½%).
<b>Federal/ State Parameters</b>	Participating states agreed to provide temporary authority for FDCMs to make medical determinations (with co-signature and review by an MC).	Legislation provides federal employees with the authority to make the non-medical determination on disability cases as well as to take final action on adjudicating the case. Legislation also provides States with the authority to make medical determinations on disability cases.  SSA Regulations provide the latitude to move the state jurisdiction back to SSA in certain situations, including those situations where there is voluntary agreement.	To continue or expand the DCM process would require state agreement for FDCMs and federal support to trigger cases developed by SDCMs.
<b>Federal/ State Pay Disparity</b>	Federal employees were temporarily assigned to the DCM position and most received promotions. There were variances in personnel classifications for SDCMs and a much smaller percentage received temporary pay increases.	There are significant salary disparities from State to State, as well as between federal and state jobs.	Significant pay disparities already are in existence between federal and most state employees. With the addition of FDCM and CSS promotions, pay differences are even greater. Having both federal and state employees perform the same job exacerbates the issue.



## V. General Conclusions:

- There was a mix of outcomes from the DCM test. Although the DCM process showed improvement in a number of areas; overall test results do not make a compelling business case for continuing DCM efforts or for making resource commitments to implement the process.
- Case processing costs for both salary and medical evidence were substantially higher for the DCM process.
- Training and infrastructure changes needed to support additional testing and/or rollout would add further to the costs. The combination of costs would further strain Agency resources.
- The long-standing legislative and regulatory structure of the federal/state relationship would require redefinition to accommodate the DCM process.
- Pursuing further testing of the DCM within our current paper claims environment would not provide additional data to help determine if or how DCM attributes could fit into an automated, paperless process.
- There were valuable insights and lessons learned from the DCM test experience that can be used as a resource, as more detailed planning is undertaken for the (2010) Service Vision.

*Cross-training* employees to specialize in both state/federal functions is a viable concept, however, it requires a significant investment of resources (both in dollar and human capital).

*Combining FO/DDS functions* emphasizes the need for a unified *measurement system* to capture workload receipts, pending and clearances.

*Knowledge sharing* between federal and state DCM staff increased awareness & appreciation levels for their respective functions. Federal DCMs relayed that their training and test experience underscored the need for *improving* the content of the medical *data collection form* (3368) and they expressed a strong interest in sharing this knowledge with their co-workers in field offices.

*Sharing state/federal resources* helped identify training needs, improved communication and moved the Agency closer to the “One SSA” concept.

Knowledge and experience gained as a result of the DCM pilot can help in our continuing efforts to improve customer service. Applying such insights, however, must take place within the context of the Agency’s long range Service Vision and in alignment with other initiatives. Clearly there are aspects of the DCM initiative that support the Vision (e.g.,

providing customers with a single point of contact). A number of other key Agency initiatives may also contribute to the Vision, but none of these initiatives can be considered in isolation. DCM experience, along with other national, regional, state and local initiatives, could collectively help shape the future path of the Agency as we seek to broaden our case processing options.

## VI. Appendices

### Appendix I: DCM Site Locations & Staff

Reg	Site Name	Site Type	Staff <sup>1</sup> on 11/01/99				Staff on 11/30/00			
			DCM	CSS	Other <sup>2</sup>	Total	DCM	CSS	Other	Total
ATL	Birmingham, AL	state	1.8	1	2	4.8	5	1	1	7
	Mobile, AL	fed	4	2	0.5	6.5	4	2	0.5	6.5
	Jacksonville, FL	fed	4	2	0	6	3	1	0	4
	Jacksonville, FL	state	2	0	0	2	2	0	0	2
	Marietta, GA	fed	10	4	1	15	9	3	1	13
	Decatur, GA	state	12	0	1	13	11	1	1	13
	Jackson, MS	fed	8	2	1	11	8	4	1	13
	Madison, MS	state	6	0	0.5	6.5	2	0	0.5	2.5
CHI	Springfield, IL	fed	6	3	0.5	9.5	4	2	0.5	6.5
	Springfield, IL	state	6	0	3	9	6	0	2	8
	Fort Wayne, IN	fed	4	2	0.5	6.5	2	1	0.5	3.5
	Indianapolis, IN	fed	5	2	0.5	7.5	5	2	0.5	7.5
	Indianapolis E., IN	fed	3	1.5	0.5	5	3	1.5	0.5	5
	Indianapolis, IN	state	3	0	1	4	2	0	1	3
	Detroit, MI	state	5	0	0.5	5.5	4	0	0.5	4.5
	Detroit, MI	fed	5	1	0.5	6.5	5	2	0.5	7.5
	Traverse City, MI	state	5	0	0.5	5.5	4	0	0.5	4.5
	Traverse City, MI	fed	5	2	1	8	3	1.5	1	5.5
	Milwaukee-Mitchell, WI	fed	4	2	0.5	6.5	2	1	0.5	3.5
	Eau Claire, WI	fed	4	2	0.5	6.5	4	1	0.5	5.5
DEN	Madison, WI	state	6	1	1	8	6	0	1	7
	Denver, CO	combo	10	3	1	14	7	2	1	10
	Helena, MT	combo	2	1	0.5	3.5	1	0	0	1
KC	Salt Lake City, UT	combo	5	2.5	0.5	8	2	1	0.5	3.5
	Des Moines, IA	state	3	0	1	4	3	0	1	4
	Des Moines, IA	fed	5	2.5	0.5	8	4	1	0.5	5.5
	Topeka, KS	state	3	0	1	4	3	0	1	4
NY	Kansas City, KS	fed	6	1	0	7	2	1	0	3
	Cherry Hill, NJ	fed	4	2	1	7	4	1	1	6
	Hackensack, NJ	fed	6	3	1	10	6	2	1	9
	New Brunswick, NJ	state	10	0	3	13	8	0	3	11
	New Brunswick, NJ	fed	3	1.5	1	5.5	3	1	1	5
	Newark, NJ	fed	5	2.5	1	8.5	5	2	1	8
	Trenton, NJ	fed	5	2	1	8	5	2	1	8
SF	Phoenix, AZ	state	7	1	2	10	6	0.5	2	8.5
	Phoenix, AZ	fed	5	2.5	1	8.5	3	0.5	0.5	4
<b>Grand Total</b>			187.8	52	32	271.8	156	38	29	223

<sup>1</sup> Note that decimals are for staff who did not work full-time for the entire month.

<sup>2</sup> "Other" includes the Site Coordinator and DDS staff support assigned to the DCM site.



## **Appendix II-1: Random Lead Process for the DCM and Control Groups**

### **Scheduling Appointments**

The DCM workload was restricted to adult disability claims, so a basis for comparison to a control population of the same type of claims was required. Further, Lewin recommended that the lead selection process be randomized, and that lead selection be limited to the same demographic sources for lead cases and control cases.

To obtain a consistent mix of leads for all DCM sites and control groups, the national teleservice center (TSC) system was utilized to assign leads. Leads were scheduled and randomly assigned by TSR or FO personnel to ensure comparability of cases assigned to the DCM and control sites. To ensure random assignment of leads further required that no FO or DCM site screen the leads prior to their being scheduled for the DCMs and the control groups.

To achieve a random assignment of leads, the leads were scheduled by TSRs or FO staff into pre-identified appointment slots using one of the methods described below. Once they are scheduled, DCM leads can be screened to ensure that the lead is appropriate for DCM processing. Leads not in the test universe were referred to the SC for appropriate action.

### **Random Assignment Protocol**

Based on the number of leads needed to support the DCM sites and their respective control groups, the participating Area Director selected specific field offices (FO) as the source of leads for the test and control cases. These could be limited to certain FOs, certain districts, or selected from throughout the state. The number of leads from a given office could be adjusted during the life of the test so long as it was done proportionately for both the DCM and control group. In most sites, the lead and control sources remained constant throughout the test.

Control group leads were pulled from the same offices in the same proportions as the DCM leads. Any changes to the areas served by the DCM required the same changes to the control group. The control group leads were normally pulled the same day as the DCM leads, but always within the same week.

There were four acceptable mechanisms for assuring the randomness of the DCM leads and the control cases:

1. A field office designated as a DCM lead source could change their appointment calendars to provide leads at one-minute intervals for the DCM site and control group. For example, the office might set up appointments at 10:01 for an SDCM lead, 10:02 for an FDCM lead, and 10:03 for a control lead.
2. The office could assign DCM leads using terminal digits from the applicant's SSN. The field offices involved transferred the subject leads to the FDCM or SDCM site, and reported the control SSNs to the appropriate Site Coordinators.

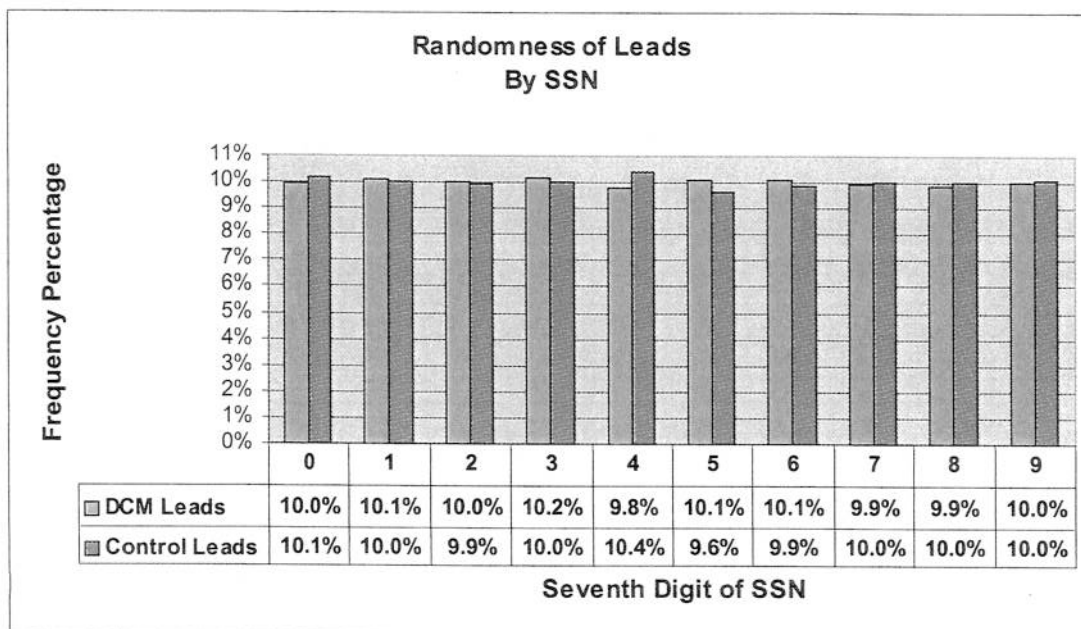


3. The office could use specific time slots on the appointment calendars that are designated for the DCM sites and control groups. For example, 10:00 may be an FDCM, 11:00 an SDCM, and 12:00 a control. FO personnel and DCM sites knew which lead on the FO calendar at a specific time belonged to whom.
4. The FO could update their appointment screen remarks to instruct anyone scheduling an appointment for an adult disability claim in the office to schedule the appointment directly onto the DCM calendar.

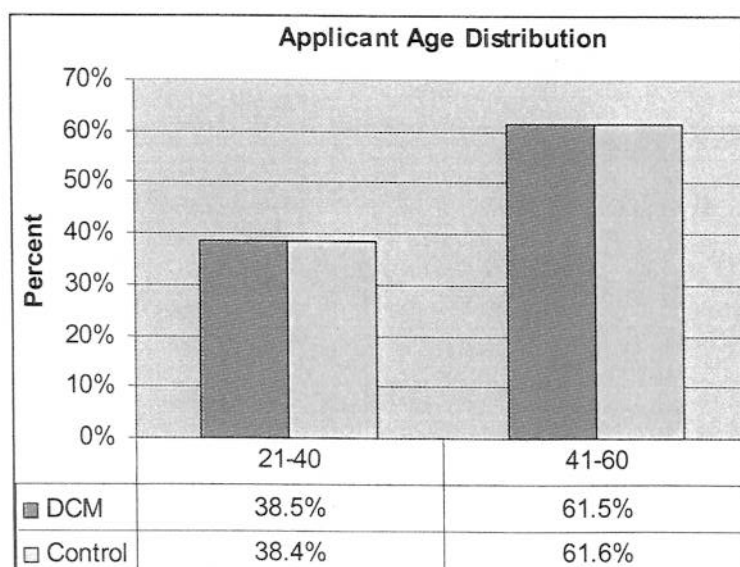
Only one of the four methods described could be used to assign leads. Any of these methods assured random leads.

## Appendix II-2: Verification that leads were random:

To verify that the leads were selected randomly, the seventh digit of the lead SSN was checked for distribution in the DCM and control groups. The distribution was found to be random.



A comparison of the age of applicants who filed for disability was made between the DCM and control groups to ensure that the claims resulting from leads were random. The comparison was found to be random.



## Appendix III-1: Title II Processing Time

DCM Title II Processing Time												
File/Cohort	Allow			Medical			Technical			All		
Month	#	Median	Mean	#	Median	Mean	#	Median	Mean	#	Median	Mean
Nov-99	358	65.0	76.8	471	85.0	93.1	0			829	77.0	86.0
Dec-99	579	64.0	78.7	814	78.0	87.9	0			1393	73.0	84.0
Jan-00	695	66.0	80.9	984	77.0	86.7	3	72.0	100.7	1682	72.0	84.4
Feb-00	852	72.0	83.1	1153	78.0	86.4	4	151.0	169.8	2009	77.0	85.2
Mar-00	873	72.0	81.3	1285	76.0	83.8	13	68.0	100.5	2171	75.0	82.9
Apr-00	777	73.0	82.5	1041	77.0	84.6	51	16.0	36.3	1869	73.0	82.4
May-00	832	72.0	78.3	1217	78.0	83.0	156	1.0	10.8	2205	73.0	76.1
Jun-00	767	71.0	74.0	1161	77.0	80.0	155	1.0	12.2	2083	71.0	72.7
Jul-00	533	68.0	69.2	869	71.0	73.5	119	0.0	9.9	1521	67.0	67.0
Aug-00	539	55.0	58.3	773	64.0	62.7	144	0.0	4.4	1456	55.0	55.3
Sep-00	329	43.0	41.1	410	49.0	49.3	111	0.0	4.4	850	42.0	40.3
Oct-00	209	22.0	23.9	145	36.0	34.5	117	1.0	3.9	471	21.0	22.2
Nov-00	57	10.0	12.8	20	16.0	15.7	77	0.0	1.7	154	2.0	7.6
Total	7400	64.0	73.6	10343	73.0	80.0	950	1.0	11.2	18693	67.0	74.0

Control Title II Processing Time												
File/Cohort	Allow			Medical			Technical			All		
Month	#	Median	Mean	#	Median	Mean	#	Median	Mean	#	Median	Mean
Nov-99	210	82.5	103.7	336	99.0	111.6	2	233.0	233.0	548	94.0	109.0
Dec-99	315	87.0	110.3	465	94.0	109.6	4	250.5	236.0	784	91.5	110.5
Jan-00	437	83.0	96.3	583	94.0	105.1	4	155.0	162.8	1024	90.5	101.6
Feb-00	527	91.0	99.1	778	92.0	105.8	3	228.0	213.7	1308	92.0	103.4
Mar-00	566	97.5	101.2	809	95.0	103.5	9	77.0	100.3	1384	96.0	102.5
Apr-00	542	95.0	100.2	771	101.0	106.7	23	18.0	105.1	1336	99.0	103.0
May-00	588	90.0	95.7	833	93.0	97.8	130	0.0	9.8	1551	87.0	89.6
Jun-00	580	83.5	84.1	818	93.0	93.9	130	0.0	5.6	1528	84.0	82.7
Jul-00	477	73.0	72.9	685	80.0	79.4	119	0.0	7.7	1281	72.0	70.3
Aug-00	536	55.5	56.2	646	70.0	61.4	171	0.0	6.2	1353	58.0	55.6
Sep-00	323	39.0	37.8	253	53.0	51.8	137	0.0	6.6	713	40.0	37.3
Oct-00	221	22.0	22.9	82	33.5	31.4	160	0.0	4.4	463	13.0	18.0
Nov-00	72	0.0	7.4	11	1.0	5.1	116	0.0	2.7	199	0.0	4.5
Total	5394	74.0	83.5	7070	87.0	94.8	1008	0.0	10.5	13472	77.0	84.0



**Appendix III-2: Title XVI Processing Time**

DCM Title XVI Processing Time												
File/Cohort	Allow			Medical			Technical			All		
Month	#	Median	Mean	#	Median	Mean	#	Median	Mean	#	Median	Mean
Nov-99	158	93.0	100.2	352	84.0	95.3	21	105.0	106.4	531	86.0	97.2
Dec-99	242	88.0	96.2	567	81.0	92.6	37	88.0	92.3	846	83.0	93.6
Jan-00	337	91.0	97.3	704	78.0	85.6	72	45.0	60.2	1,113	79.0	87.5
Feb-00	394	94.0	101.7	820	80.0	88.5	214	1.0	35.3	1,428	78.0	84.2
Mar-00	407	84.0	91.3	944	74.0	83.5	254	1.0	26.0	1,605	69.0	76.4
Apr-00	336	94.0	97.1	809	79.0	84.7	229	1.0	28.8	1,374	71.0	78.4
May-00	346	91.0	90.2	890	78.0	82.2	238	1.0	22.8	1,474	74.0	74.5
Jun-00	324	82.0	81.6	827	76.0	78.7	278	1.0	19.3	1,429	67.0	67.8
Jul-00	214	76.0	75.3	617	72.0	72.7	213	0.0	15.2	1,044	63.0	61.5
Aug-00	174	63.0	65.1	518	61.0	62.0	269	0.0	10.5	961	50.0	48.2
Sep-00	93	50.0	55.1	281	49.0	49.5	188	1.0	11.8	562	37.0	37.8
Oct-00	43	27.0	46.0	96	36.0	37.7	185	1.0	6.0	324	11.0	20.7
Nov-00	7	13.0	48.4	19	22.0	35.6	115	0.0	1.5	141	0.0	8.4
Total	3,075	83.0	89.2	7,444	73.0	80.6	2,313	1.0	22.1	12,832	67.0	72.1

Control Title XVI Processing Time												
File/Cohort	Allow			Medical			Technical			All		
Month	#	Median	Mean	#	Median	Mean	#	Median	Mean	#	Median	Mean
Nov-99	160	119.0	121.5	299	106.0	117.9	22	117.0	141.0	481	111.0	120.1
Dec-99	226	107.0	112.5	451	97.0	108.8	42	91.0	104.3	719	99.0	109.7
Jan-00	316	87.0	101.4	568	90.0	104.1	76	79.0	80.6	960	88.0	101.4
Feb-00	386	85.0	93.0	656	92.0	106.8	178	2.0	43.7	1220	84.0	93.2
Mar-00	425	87.0	90.7	704	91.0	99.7	211	0.0	36.0	1340	82.0	86.8
Apr-00	379	95.0	92.9	691	98.0	103.5	202	1.5	32.8	1272	87.0	89.1
May-00	411	91.0	90.5	795	97.0	99.4	247	0.0	29.0	1453	85.0	84.9
Jun-00	383	78.0	76.5	755	92.0	91.5	255	0.0	21.4	1393	78.0	74.5
Jul-00	303	67.0	64.3	625	81.0	80.2	280	0.0	14.0	1208	66.0	60.8
Aug-00	275	58.0	55.4	554	72.0	69.6	293	0.0	10.8	1122	55.0	50.8
Sep-00	150	27.0	33.5	210	55.0	54.6	272	0.0	7.5	632	22.0	29.3
Oct-00	88	13.0	25.9	71	36.0	39.0	232	0.0	4.6	391	2.0	15.6
Nov-00	18	4.5	18.0	3	77.0	70.3	161	0.0	1.3	182	0.0	4.1
Total	3520	77.0	83.9	6382	86.0	95.0	2471	0.0	23.7	12373	73.0	77.6

## Appendix III-3: Title II Prototype Processing Time

DCM Title II Prototype Processing Time												
File/Cohort Month	Allow			Medical			Technical			All		
	#	Median	Mean	#	Median	Mean	#	Median	Mean	#	Median	Mean
Nov-99	44.0	72.0	105.6	87.0	118.0	133.3	0.0			131.0	109.0	124.0
Dec-99	85.0	102.0	121.3	126.0	114.0	129.0	0.0			211.0	110.0	125.9
Jan-00	126.0	108.0	109.5	150.0	119.0	134.4	0.0			276.0	117.0	123.0
Feb-00	161.0	95.0	108.1	230.0	119.0	129.8	4.0	121.0	127.8	395.0	110.0	120.9
Mar-00	185.0	110.0	109.1	247.0	126.0	127.1	1.0	300.0	300.0	433.0	119.0	119.8
Apr-00	136.0	103.0	102.9	214.0	127.0	128.7	8.0	34.0	52.8	358.0	119.0	117.2
May-00	162.0	87.0	92.0	220.0	113.0	111.8	26.0	0.0	6.7	408.0	94.0	97.3
Jun-00	133.0	81.0	86.4	207.0	98.0	100.1	30.0	0.0	7.7	370.0	90.0	87.7
Jul-00	84.0	74.0	74.7	130.0	91.0	85.2	12.0	2.0	9.4	226.0	82.0	77.3
Aug-00	78.0	67.0	64.9	117.0	77.0	73.2	12.0	4.5	9.6	207.0	70.0	66.4
Sep-00	36.0	46.0	50.7	43.0	51.0	49.4	7.0	0.0	2.3	86.0	48.0	46.1
Oct-00	27.0	24.0	30.2	14.0	47.0	43.1	5.0	0.0	2.6	46.0	30.0	31.1
Nov-00	5.0	16.0	13.2	2.0	16.0	16.0	9.0	0.0	1.8	16.0	2.5	7.1
Total	1262.0	87.0	95.7	1787.0	106.0	114.5	114.0	0.0	16.8	3163.0	96.0	103.4

Control Title II Prototype Processing Time												
File/Cohort Month	Allow			Medical			Technical			All		
	#	Median	Mean	#	Median	Mean	#	Median	Mean	#	Median	Mean
Nov-99	43.0	92.0	105.8	71.0	120.0	129.9	1.0	222.0	222.0	115.0	111.0	121.7
Dec-99	68.0	127.0	135.9	114.0	125.0	133.1	1.0	168.0	168.0	183.0	126.0	134.4
Jan-00	96.0	121.0	127.1	158.0	130.0	134.9	1.0	195.0	195.0	255.0	128.0	132.2
Feb-00	134.0	114.0	118.2	214.0	135.0	139.7	3.0	127.0	152.7	351.0	127.0	131.6
Mar-00	144.0	111.0	113.8	237.0	131.0	136.8	1.0	35.0	35.0	382.0	126.0	127.9
Apr-00	117.0	118.0	116.1	201.0	132.0	131.4	7.0	38.0	54.0	325.0	125.0	124.2
May-00	118.0	99.0	96.8	211.0	133.0	128.0	35.0	0.0	16.3	364.0	117.0	107.1
Jun-00	129.0	97.0	93.2	155.0	111.0	107.4	29.0	0.0	12.4	313.0	98.0	92.7
Jul-00	103.0	82.0	79.3	99.0	98.0	93.9	12.0	0.0	10.7	214.0	86.0	82.2
Aug-00	107.0	49.0	50.7	101.0	84.0	78.7	38.0	0.0	12.3	246.0	64.0	56.2
Sep-00	83.0	28.0	33.7	42.0	49.0	45.3	30.0	0.0	8.5	155.0	30.0	32.0
Oct-00	72.0	14.0	20.7	12.0	39.0	31.5	37.0	0.0	4.2	121.0	5.0	16.8
Nov-00	24.0	0.0	5.2	7.0	13.0	41.6	31.0	0.0	0.0	62.0	0.0	6.7
Total	1238.0	83.0	91.5	1622.0	119.0	122.0	226.0	0.0	15.0	3086.0	100.0	101.9



**Appendix III-4: Title XVI Prototype Processing Time:**

DCM Title XVI Prototype Processing Time												
File/Cohort Month	Allow			Medical			Technical			All		
	#	Median	Mean	#	Median	Mean	#	Median	Mean	#	Median	Mean
Nov-99	19	108.0	133.6	54	121.0	134.7	1	269.0	269.0	74	119.0	136.2
Dec-99	34	107.0	117.3	76	116.0	137.4	3	247.0	233.0	113	116.0	133.9
Jan-00	51	118.0	118.8	95	134.0	142.6	10	73.0	105.4	156	126.0	132.5
Feb-00	73	86.0	100.8	160	108.0	126.9	44	0.0	31.4	277	93.0	104.8
Mar-00	75	133.0	128.8	176	109.0	118.5	49	0.0	29.2	300	105.0	106.5
Apr-00	69	104.0	103.9	162	124.0	126.9	46	0.0	30.5	277	107.0	105.2
May-00	73	91.0	88.1	166	108.0	111.9	54	0.0	35.4	293	93.0	91.9
Jun-00	49	74.0	74.1	150	97.0	99.8	37	0.0	9.0	236	83.0	80.2
Jul-00	33	74.0	77.0	75	90.0	85.2	35	1.0	20.7	143	74.0	67.5
Aug-00	29	50.0	60.5	73	72.0	68.1	34	3.0	23.1	136	56.0	55.2
Sep-00	7	49.0	63.0	15	49.0	51.0	20	4.0	13.0	42	40.0	34.9
Oct-00	5	19.0	43.2	8	52.0	48.3	14	2.5	10.6	27	17.0	27.8
Nov-00	1	251.0	251.0	0		0.0	17	1.0	2.0	18	1.5	15.8
Total	518	96.0	100.5	1210	104.0	114.9	364	1.0	28.6	2092	92.0	96.3

Control Title XVI Prototype Processing Time												
File/Cohort Month	Allow			Medical			Technical			All		
	#	Median	Mean	#	Median	Mean	#	Median	Mean	#	Median	Mean
Nov-99	27	114.0	126.6	65	123.0	127.8	0			92	120.0	127.5
Dec-99	51	132.0	124.7	121	119.0	124.8	8	82.0	90.8	180	120.0	123.3
Jan-00	77	118.0	124.1	157	118.0	122.3	8	50.0	71.0	242	118.0	121.2
Feb-00	97	120.0	116.9	194	127.0	130.9	34	25.0	56.1	325	120.0	118.9
Mar-00	127	107.0	109.1	253	130.0	134.1	52	1.5	47.3	432	119.0	116.3
Apr-00	108	90.0	91.7	203	122.0	126.6	41	1.0	33.9	352	109.0	105.1
May-00	87	95.0	90.0	221	128.0	125.4	39	1.0	34.2	347	110.0	106.3
Jun-00	79	93.0	86.2	154	115.0	111.1	39	0.0	10.6	272	100.0	89.5
Jul-00	54	73.0	72.6	95	95.0	92.4	39	0.0	12.3	188	78.0	70.1
Aug-00	64	48.0	48.4	77	84.0	81.1	50	0.0	13.7	191	60.0	52.5
Sep-00	53	35.0	39.8	28	54.0	55.4	35	0.0	5.8	116	30.0	33.3
Oct-00	31	9.0	25.4	10	41.0	45.4	48	0.0	2.3	89	3.0	15.2
Nov-00	6	8.0	44.8	4	9.5	46.5	52	0.0	1.1	62	0.0	8.2
Total	861	87.0	92.1	1582	116.0	119.9	445	0.0	23.2	2888	98.0	96.7

## Appendix IV: Productivity and Cost Technical Notes

### Productivity and Cost Background

The current process for handling disability claims consists of two distinct parts—a FO process and a DDS process.

- **The FO measure (WUPWY):**

- Takes work credits (time devoted to a specific workload item based on national sampling);
- Multiplied by the volume of workload clearances; and
- Divided by the volume of work years used.
- Overhead is considered in both the work-credit and work year numbers.

- **The DDS measure (PPWY)**

- Converts work hours into work years; and
- Divides this number into the volume of medical case clearances to determine a production volume per work year.
- Overhead is factored into the work year calculation.

DPRT staff revised the current FO and DDS productivity formulas to allow for a comparison of the DCM to both the field office (WUPWY) and DDS (PPWY) measurement systems.

### Methodology

As mentioned, productivity was determined using modified PPWY and WUPWY calculations. Since the DCM combines the DDS and FO processes, adjustments were needed under both approaches to account for differences in the DCM. The field office measure (WUPWY) was adjusted to incorporate work credits for DCM medical case processing; and, the DDS measure (PPWY) was adjusted to include programmatic (non-medical) aspects of the case.

### Staffing:

- Trainees added in Phase 1: Thirteen federal DCM back-fills were selected during Phase 1, resulting in a mix of journeyman and trainee positions working side-by-side in the new process. Eight of the DCM back-fills completed classroom training before the start of Phase 2, four completed training shortly thereafter, and one completed training late in phase 2. Because of the long learning curve (estimated at over one year), the addition of DCM “trainees” added a complexity in evaluating productivity. These backfills were counted in two ways.
  - 1) During Phase 2 Operation: Progress reports released periodically as a site management tool recognized the “trainee” status of the back fills, and **excluded** trainee time from site parity calculations. These calculations were



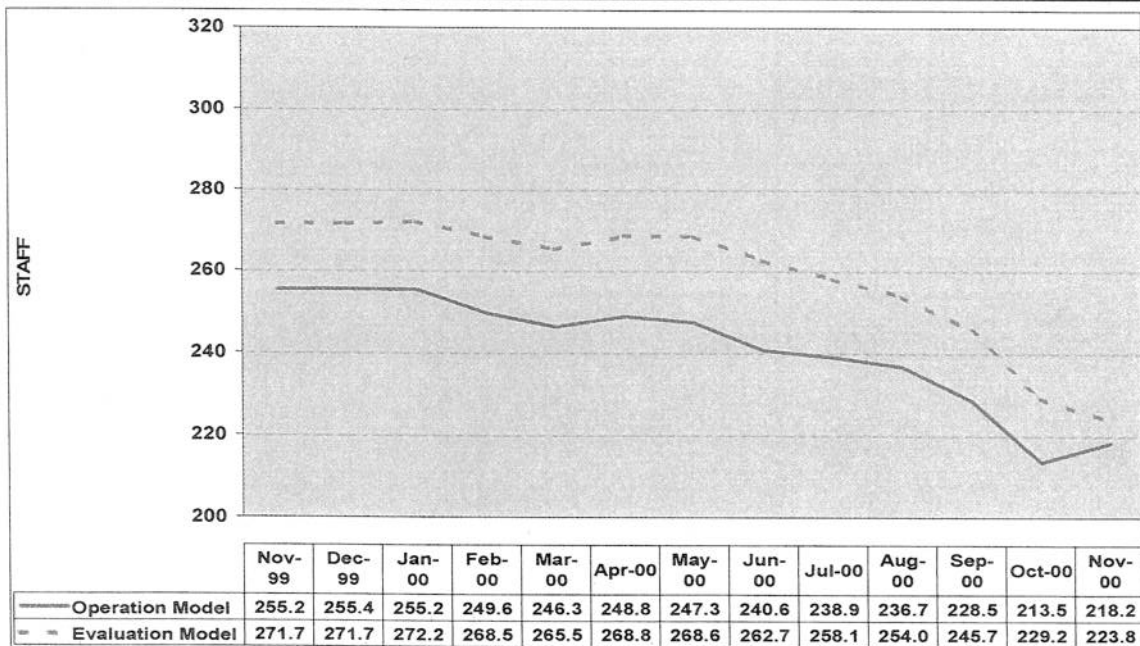
used to help determine the volume of application leads each site needed to schedule in order to achieve “parity” with the current process.

- 2) For the DCM evaluation: Calculations in the evaluation section **include** trainee time to better reflect how trainees are considered in the current claims environment. The DCM new-hire rate (7.42%) was lower than both the current process claims representative (9.22%) and disability examiner (11.68%) new-hire rates.
- Incorporating CSS positions: The addition of the CSS position also increased the complexity of productivity calculations. CSSs provided support for work done by the DCMs and processed other related work, such as auxiliary claims. CSS support to DCM sites were based upon a 1:2 ratio in calculating productivity. If the DCM site had a less than 1:2 CSS ratio the actual ratio was used, if great than 1:2 a maximum of 1:2 ratio was used. CSS time above this ratio was not spent on DCM support activities. There was no standardized use of CSS support and work specifically attributable to the CSS could not be identified
  - Staffing Model Calculations: As noted, two staffing models were developed to look at the impact of DCM back-fills and long term leave used during the test. The first model, “Phase 2 Operation Model”, was developed to serve as a management tool to estimate the volume of intake and clearances a site needed to approximate parity with the current process. The second model, the “Evaluation Model”, was developed to reflect an approach that is more reflective of how staff is counted in the current claims processing environment.
- 1) **“Phase 2 Operation Model”**: This model helped sites monitor their performance and determined the targeted volume of leads that would be expected to result in a workload volume reasonably comparable to the current process. The following guidelines were used to determine staffing that was counted for productivity estimation purposes:
    - Staff on duty included any DCM, SC, CSS, or other clerical staff assigned to a DCM test site. Part-time hours were shown as a fraction of full-time. For example, a person working 32 hours per week in a 40 hour per week site was shown as .8. CSS staff time was determined on a 1:2, CSS to DCM, ratio. (CSS time above this ratio was spent on production unrelated to the DCM. This time and work produced was not credited to the DCM process).
    - Back-fills (13 DCMs and 4 CSSs) were not counted in staff on duty for productivity calculations until they completed their training and learning curve (DCMs were assumed to have a 12-month learning curve).



- Total staff hours considered weeks in the month, times hours in a workweek,<sup>1</sup> times staff on duty.
  - Overhead hours were included in the productivity calculation (referred to as plowback), and therefore were not deducted from staff hours. This included hours spent on normal leave usage, training, meetings, etc.
  - Employees were removed from staffing if they were absent for four consecutive weeks or more (i.e. a long-term illness), or for the percentage of time they expended on other duties to which they were assigned (i.e. union negotiations, outside training classes, etc.). This block of time totaled 5,184 hours (<1% of total staff hours used) and was excluded under this model.
- 2) **Evaluation Model:** The “Evaluation Model” is the same as the “Phase 2 Operation Model”, except trainees were counted as staff on duty for the productivity calculation with their entry-on-duty date. Also, employees are not excluded for absences related to leave or other duties. The staffing mix used in the Evaluation Model more closely reflects a mix of trainees to journeyman staff, as compared to the field office and DDS staff-mix at the national level. In FY 2000, DDS’s experienced an examiner trainee rate of about 6.8%. CRs in field offices experience about a 9% rate of new hires. The DCM trainee ratio was 6.4%. This model provides a better comparison to the current process.

#### STAFFING TOTALS PER STAFFING MODEL



<sup>1</sup> This was usually 40 hours, but three sites had a workweek of less than 40 hours.

**Attrition:** The DCM experienced a 1.2 percent attrition rate through the first 7 months of the Phase 2 evaluation period. From June through August the attrition rate was about 3.2%. September through November attrition increased to 13.9%. The overall DCM attrition rate of about 17% was significantly greater than the current process claims representative and disability examiner combined attrition rate of 10.1% (attrition in the 15 states involved in the test). However, about 2/3 of DCM attrition occurred late in the test period and may have been influenced by the impending end of the test.

STAFFING BREAKDOWN BY JOB/ PER MODEL <sup>2</sup>						
MODEL	MONTH	SC	SDCM	FDCM	OTHER	CSS
PHASE 2 OPERATION MODEL	Nov-99	24.5	77.3	98.0	7.5	47.9
	Dec-99	24.5	77.3	98.0	7.5	48.1
	Jan-00	24.5	78.3	97.0	7.5	47.9
	Feb-00	24.5	76.8	95.3	7.5	45.5
	Mar-00	24.5	76.0	94.0	7.5	44.3
	Apr-00	24.5	79.2	94.0	7.5	43.6
	May-00	24.3	77.9	94.0	7.3	43.8
	Jun-00	24.3	75.9	93.2	5.5	41.7
	Jul-00	24.5	75.3	93.0	5.5	40.6
	Aug-00	24.1	75.0	92.0	5.5	40.1
	Sep-00	23.7	72.6	88.3	5.5	38.4
	Oct-00	23.8	66.8	82.8	5.5	34.6
	Nov-00	23.5	65.3	88.0	5.5	35.9
EVALUATION MODEL	Nov-99	24.5	77.8	110.0	7.5	51.9
	Dec-99	24.5	77.8	110.0	7.5	51.9
	Jan-00	24.5	78.8	110.0	7.5	51.4
	Feb-00	24.5	78.1	109.0	7.5	49.4
	Mar-00	24.5	77.5	107.6	7.5	48.4
	Apr-00	24.5	80.8	106.0	7.5	50.0
	May-00	24.3	80.5	106.0	7.3	50.6
	Jun-00	24.3	78.4	105.0	5.5	49.5
	Jul-00	24.5	77.8	104.0	5.5	46.4
	Aug-00	24.1	77.0	103.0	5.5	44.4
	Sep-00	23.7	73.8	99.6	5.5	43.1
	Oct-00	23.8	68.0	92.8	5.5	39.1
	Nov-00	23.5	66.5	90.0	5.5	38.3

This chart shows the average staffing on duty during the months of Phase 2. SC time translated into 24 positions; and, other jobs in the test accounted for 231 positions. These figures support a supervisory ratio in the DCM process of about 1:10 ½.

<sup>2</sup> The staffing counts in these charts do not take into consideration the actual staffing charged to certain sites where a percentage allocation was made (SDCMs in Michigan were actually involved in DCM 70% of the time). This adjustment was made when calculating productivity.



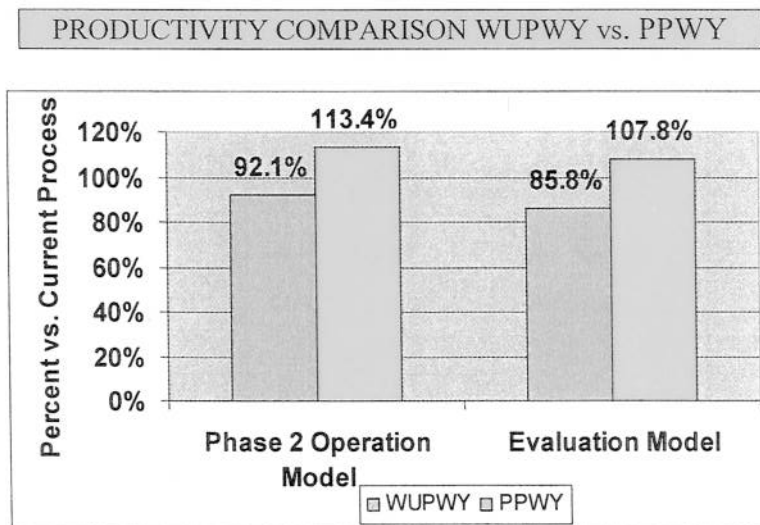
Staff hours to use in the productivity and cost calculations were determined by multiplying weekly staff counts under each model by the hours of work per site. Hours were totaled over the 56-week test duration to determine total staff hours. Staff hours were used in both the PPWY and WUPWY calculations to determine productivity.

STAFFING	Phase 2 Operation Model	Evaluation Model
TOTAL HOURS USED	528,473.3	567,313.5

The *Evaluation Model* resulted in 7.3% more staff time charged to the DCM project as compared to the *Phase 2 Operation Model*.

### Productivity: WUPWY and PPWY Calculations

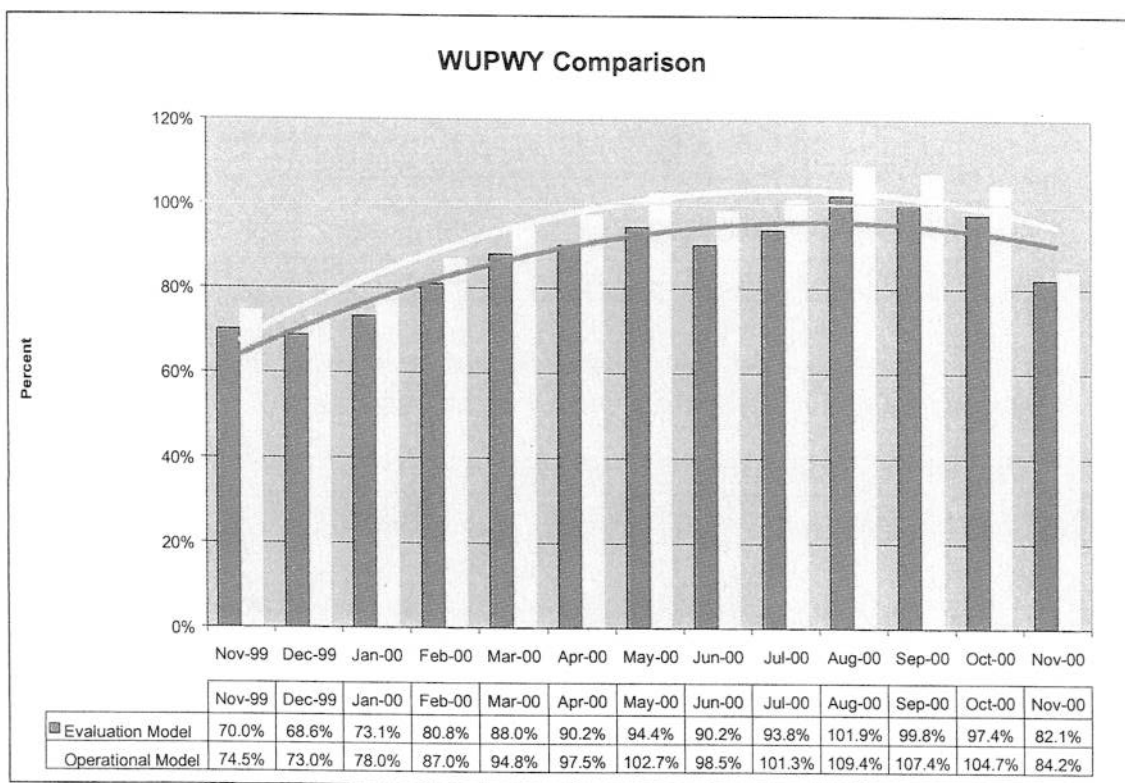
The following chart summarizes DCM productivity results for both the WUPWY (FO) and PPWY (DDS) calculations:



## WUPWY

### 1. Calculations:

- WUPWY productivity was determined by multiplying the number of clearances in each DOWR workload category by the respective DOWR/DOWS national work-credit time.
- Work credits were also given for the number of medical decisions by DCM sites.
- These work credits (divided by 60 to convert to work credit per hour) were divided by total staff time used (in hours) to determine the productivity percentage. This number was compared to the national productivity (at 100%) as a comparison to the current process.
- This productivity calculation considers total work produced by DCM staff (i.e. CSS and SC time), not just the volume of claims.



### 2. Sources of data:

- DOWR/DOWS data was used for the volume of clearances. Clearances of all field office workload items, captured by the DOWR and cleared by DCM units,

were credited. For DOWR purposes, concurrent claims counted as a Title II and a Title XVI clearance.

Workload credits (time values for workload clearances) were also taken from the DOWR/DOWS. Calculations incorporated overhead (plowback) time<sup>3</sup> and are computed in minutes.

- NDDSS data was used for volume counts of medical clearances. Concurrent claims counted as one medical decision.
- DPRT Database data was used to determine DCM staff hours.
- Cost Effective Management System (CEMS) and an OWA baseline study data were used to determine adjustments needed to reflect the amount of DDS support for medical decisions. Adjustments were:
  - Minutes<sup>4</sup> subtracted from national task times to compensate for support provided by the DDS in MC time, CE scheduling, and QA reviews.
  - Minutes added to DCM clearances in Prototype sites to recognize the additional time required for claimant conferences and rationale development.

### **3. Clearance Credits for Medical Decisions**

Medical decision clearances are unique to DDS processing and are not captured as part of the field office (WUPWY) calculation. Since the DCMs make medical determinations, time calculations were built to reflect these medical clearances. The chart below reflects a summary of time calculations developed to account for medical clearances.

<b>DCM MEDICAL CASE CREDITS</b>		
<b>SITE TYPE</b>	<b>DECISION TYPE</b>	<b>MINUTES CREDITED</b>
<b>DCM</b>	<b>All Cases</b>	<b>347.2</b>
<b>DCM/Prototype</b>	<b>Allowances</b>	<b>422.2</b>
<b>DCM/Prototype</b>	<b>Medical Denials</b>	<b>457.2</b>
<b>DCM/Prototype</b>	<b>No Decision<sup>5</sup></b>	<b>347.2</b>

<sup>3</sup> "Plowback" time adds the indirect costs (such as leave, training, management, and etc.) back into the calculation as overhead

<sup>4</sup> These adjustments to the task times were based on 3/99 (2-quarter) CEMS data for the DDS adjustments and on the budget assumptions for prototype adjustments.

<sup>5</sup> "No Decision" cases are those cases on the NDDSS that were returned to the initiating office by the DDS without a medical decision. If the file is not returned to the DDS for additional action within 45 days, the NDDSS counts this as a cleared "No Decision" case.



Charts below provide more detail as to how the summary calculations were built.

Computation of Medical Decision Work Credit in Current Process		
Item	Credit	Source
Title II Medical Decisions	502.25	9/99 SAOR (Plowback) <sup>6</sup>
Title XVI Medical Decisions	326.53	9/99 SAOR (Plowback)
Concurrent Medical Decisions	371.33	9/99 SAOR (Plowback)
Average for All Decisions	411.6	DPRT Calculation(weighted)
Average time was used for DCM credit to correct for variations in SAWS data		

Adjustments Made to DCM Cases to Account for DDS Direct Support			
DDS Support Items	Time	Plus/Minus	Source
Medical Consultant Time	34.8	Minus	3/99 CEMS <sup>7</sup>
Quality Assurance Time	14.0	Minus	3/99 CEMS
Consultative Examination Sched.	15.6	Minus	OWA Baseline Study
Total Adjustment <sup>8</sup>	64.4	Minus	

DCM Medical Decision Case Credit for Non-prototype States		
Calculated Base Credit	DDS Adjustment	DCM Credit
411.6	(64.4)	347.2

Adjustments for DCM Prototype Cases				
Item	Time	+/-	Source	Applies to
Rationale	75	Plus	Prototype	Allowances and Medical Denials
Claimant Conference	35	Plus	Prototype	Medical Denials
DCM Medical Decision Case Credit for Prototype Cases				
	Nation	No Decision	Allowances	Medical Denials
Adjustments		Basic DCM Credit (Nation less DCM Adj.)	Basic DCM Credit Plus Rationale	Basic DCM Credit Plus Rationale and Claimant Conference
Work Credit	411.6	347.2	422.2	457.2

DCM medical clearances in Prototype sites are given a different time credit than those cleared in a non-prototype site because of the differences in development time (i.e. time for claimant conference and enhanced rationale). The appropriate multiplier was applied

<sup>6</sup> Derived from the most recent SAOR data available

<sup>7</sup> Derived from the most recent Cost Effectiveness Management System (CEMS) data available.

<sup>8</sup> DPRT considered an adjustment for the time involved in triggering cases for SDCMs and other support activities provided by DDSs. Due to the limited number of sites this involved, the varied practices, the insignificant amount of time per case, and the inability to quantify these activities, no further adjustments were made.

to the volume of decisions to determine total credit under WUPWY for the DCM medical workload.

The following table shows the work units credited to the DCM for medical decisions made during the evaluation period.

<b>Work Credits For Medical Clearances From NDDSS Counts</b>			
<b>Item</b>	<b>Item Credit</b>	<b>Item Count</b>	<b>Work Credits (Minutes)</b>
Prototype Allowances	422.2	2543	1073655
Prototype Medical Denials	457.2	4110	1879092
Prototype No Medical Decision	347.2	230	79856
Non-Prototype (All Cases)	347.2	36628	12717242
Total		43511	15749844

#### **4. Other Workload Counts**

The DOWR/DOWS field measure system records were used to determine the volume of workload clearances for each category along with the corresponding time credits.

<b>DEFINITION OF DOWR/DOWS ITEMS</b>			
<b>Item</b>	<b>Definition</b>	<b>Credit</b>	<b>Count</b>
1	Retirement Claims	140.5	150
2	RSI Nondisabled Dependent Claims	73.7	204
4	Disability Insurance Claims	207.0	36227
5	DI Nondisabled Dependent Claims	93.3	2555
6	RSDI Representative Accountings	62.2	46
7	SSI Representative Accountings	32.6	35
8	SSI Aged Applications	160.5	65
10	SSI Blind/Disabled Applications	197.3	23485
11	SSI Redeterminations (Limited Issue)	30.1	18
12	SSI Continuing Disability Reviews	105.2	17
13	RSDI Earnings Enforcement	39.9	64
15	RSDI Change of Payee	61.1	77
16	RSDI Medical Continuing Disability Reviews	108.9	79
17	RSDI Work Continuing Disability Reviews	374.5	24
18	Health Insurance Workload	18.2	129
19	Supplementary Medical Insurance Workload	135.4	147
21	RSDHI Reconsiderations	51.6	29
23	Earnings Disagreements/Earnings Discrepancies	50.8	106
24	SSI Change of Payee	32.7	84
26	SSI Overpayment Decisions and Collections	26.8	114
27	RSDI Overpayment Decisions and Collections	70.7	320
28	SSI Redeterminations (Low and Middle Error Profile)	139.0	101



29	SSI Reconsiderations	60.3	5
30	SSI Redeterminations (High Error Profile)	139.0	52
31	RSDHI Class Actions	279.2	0
32	SSI Class Actions	225.9	8
36	RSDHI Hearings Requests	73.7	32
37	SSI Hearings and Appeals Requests	135.4	16
50	SSI Income and Resource Reports	12.2	661
51	SSI Status Changes	12.2	657
52	RSDHI School Program	51.1	39
53	Food Stamp Applications and Recertifications	21.3	23
54	Health Maintenance Organizations Disenrollments	34.0	169
57	RSDI Payments and Checks Cleared	78.9	151
59	Benefit Verification Services	3.6	3557
60	RSDHI Status Changes	6.6	3191
63	SSI Payments and Checks Cleared	50.1	259
64	DI Technical Denials	207.0	1848
65	SSI Aged Abbreviated Applications	160.5	18
66	SSI Blind and Disabled Abbreviated Applications	197.3	2273
79	Social Security Number Workload	12.2	1068

DCM clearances were multiplied by the credit (in minutes) to determine work credits for the DCM for their field office equivalent work.

## 5. WUPWY Calculations:

WORK CREDITS PRODUCED (IN MINUTES)			
Disability Claims	Medical Decisions	Non- Disability Work Produced	Total
12,963,580	15,749,844	500,546	29,213,970

- “Disability Claims” work credits were determined by adding the work credits produced in DOWR categories 4, 10, 64 and 66 (refer to the above *Definition of DOWR/DOWS Items* chart for the volume and item work credit for these DOWR categories).
- “Medical Decisions” work credits were determined by adding the work credits produced in non-prototype and prototype medical decisions. This is reflected in the above *Work Credits For Medical Clearances From NDDSS Counts* chart.
- “Non-Disability Work Produced” is the sum of all work credits earned in all categories other than the four “Disability Claims” categories.

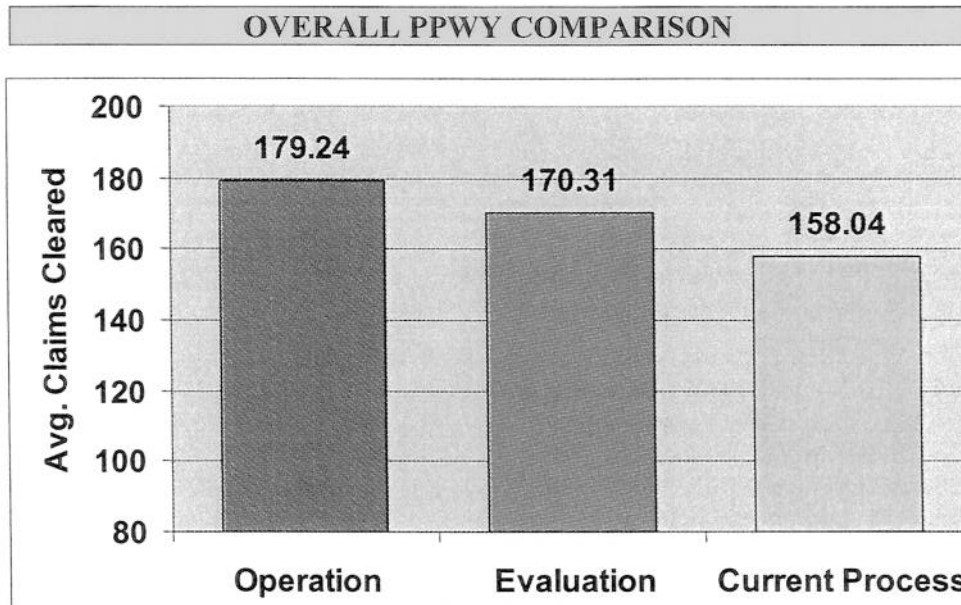
Total work credits (29,213,970 minutes) were divided by 60 to determine work-hours earned (486,899.5). Work hours earned were then divided by the staff hours used



(567,313.5) to produce the work to determine the WUPWY percent (85.8%). Non-disability workload items cleared by DCM units (DCM/CSS) comprised less than 2% of total work cleared.

## PPWY

### 1) Calculations:



**PPWY:** The second productivity measurement method is the PPWY (based on the DDS workload measurement system). The measurement includes direct and indirect time plus overhead support. PPWY (initial disability claims processed per work year) is normally expressed as a production number, as shown on this chart. PPWY for the DCM was 170.31 as compared with PPWY in the current process of 158.04 (refer to the following *CAS Charts, Current Process, Total* sheet). The PPWY was determined by dividing the number of disability claims cleared<sup>9</sup> by DCMs during the test, by the volume of work years used. The following guidelines were used in this productivity calculation:

- DCM staff hours were divided by 2080 to determine total work years (272.65 work years).
- Work years used by the DCM sites to produce **non-disability** work items (4.01) were deducted from total work years to determine the volume of work years devoted to

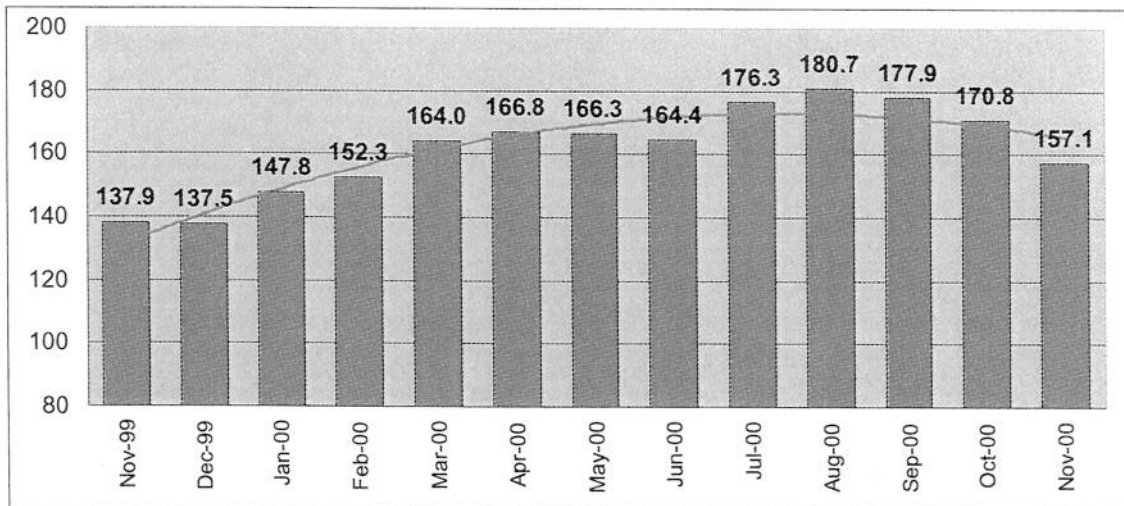
<sup>9</sup> Disability claims cleared includes technical denials and decisions adopted from one title to another. Concurrent medical decisions are counted as two decisions, one for each title.

initial disability claims. (268.74 work years, DOWR/DOWS data was used to determine the volume and time spent on non-disability claims work)

- DCM work years were allocated to Title II and Title XVI based on the percentage of work years produced under each Title.
- DDS support to DCM sites was translated into work years (43.51) and proportioned between Titles II and XVI workloads.
- CAS Report (the SC-3) data was used to identify what SSA component overhead support considered for these workload items under the current process. Comparable overhead support was factored into the DCM.<sup>10</sup> (Total of 46.65 work years).
- CAS Report (C2-15A) data was used to determine appropriate regional support to allocate to the DCM. (15.91 work years)
- The total of direct (268.74) and support (106.07) work years was divided into DCM disability claims clearances to determine PPWY.

#### Monthly PPWY:

#### MONTHLY PPWY CALCULATION



Monthly PPWY is computed in the same manner as the Overall PPWY figure discussed above (example below). Monthly PPWY uses staffing and associated production figures for a given month to calculate the PPWY for that month.

<sup>10</sup> DPRT assumption was that SSA components would provide a similar level of support to a DCM case as in the current process. The CAS does not segregate workloads; therefore the comparison is not exact.

## 2) **Sources of data:**

- DPRT Database data was used for DCM staffing numbers.
- DOWR/DOWS data was used to determine non-disability workload items cleared, and corresponding unit times. Clearances, other than initial disability claims, were deducted from DCM work hours in the PPWY calculation.
  - DOWR/DOWS counts provided the volume of disability claims cleared. Concurrent claims counted as a Title II and Title XVI clearance.
  - NDDSS data provided the volume of medical decisions. Only initial disability claims were counted. Concurrent claims counted as one medical decision.
- CEMS data and results from the OWA baseline study were used to determine DDS support time:
  - Minutes<sup>11</sup> added to compensate for support provided by the DDS for MC time, CE scheduling, and QA reviews.
  - CAS reports (SC-3 SUM, C2-15A DET) and the State Agency Operations Report (SAOR) for FY 2000 were used to adjust for regional and other DDS staff support.

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<sup>11</sup> Adjustments to task times were based on CEMS data for the DDS adjustments; and on budget assumptions for the prototype adjustments.



### 3) Sample Calculation of PPWY:

Hours per Work Year	DCM Staffing & Salaries			Total staffing data is from the weekly staffing reports database maintained by the DCM team.	
	Position	Staff	Hours		
	Site Coordinators	24.24			
	State DCMs	76.39			
	Federal DCMs	99.27			
	Other Staff	6.55			
	CSS	47.23			
					Total staff from staffing reports, based on 56 weeks of actual hours per week
	Total Staff	253.69	567,313.50		
					Hours used for work other than initial disability claims
Non-DIB Hours		8,342.46			
			Total Hours less Non-DIB hours, divided by 2080.		
DI Work Years		268.74			

Claims Cleared by DCMs	Category	Count
	DIB	38,075
	DI/BI	25,758

Program	FO Hours	DDS Hours	Total Hours	Percentage	Work Years
Title II	5.966	6.543	12.510	63.10%	169.57
Title XVI	5.784	5.029	10.814	36.90%	99.16

To properly credit the time required to process DCM cases, the work done in the DDS to support the DCM process must be added to the work years required to produce the DCM workload.	Minutes Allocated for Work Done by DDS Staff	Category	Decisions	64.4
		Title 2	20,485	1,319,243.0
		Title 16	9930	639,462.1
		Concurrent	13096	843,403.3
		Total	43511	2,802,108.4
We use 64.4 minutes per case for the DDS support.	DDS Time Allocated by Title	Category	Minutes	Work years
		Title II	1,740,944.64	13.95
		Title XVI	1,061,163.76	8.50

This chart, and the ones that follow, show PPWY calculations for the DCM staffing under the *Evaluation Model*. The same procedures were used to determine PPWY for the *Phase 2 Operation Model*.

- Staffing numbers were taken from the DPRT database. Total staff (253.69) represents the average staff on duty during the 56 week test period.
- Total staff hours (567,313.5) represent the total hours DCM staff worked during the test period.
- Non-Disability hours (8,342.46) represent the number of hours the DCM staff worked on non-disability workloads. The volume and time calculations were taken from the DOWR.
- Non-disability time was deducted from the total to determine the number of hours and workyears DCMs spent on initial disability claims (268.74).

- Claims cleared by DCMs were the number of DIB (Title II disability) and DI/BI (Title XVI disabled or blind) claims cleared by DCM sites, based on DOWR counts. DOWR categories 4,10, 64 and 66. (This includes technical denial cases.) (38,075 and 25,758)
- The CAS was used to allocate workyears to the respective Titles (63.1% for Title II and 36.9% for Title XVI)
- The proportion of hours was then applied to the DCM staffing “DI Work Years” to determine the apportioned workyears. ( 169.57 and 99.16)
- DDS support for the DCM was calculated by taking task times from the most recent CEMS data (64.4 minutes per decision) and multiplying by the number of medical decisions made by DCMs. This was apportioned to the respective titles and crediting half the work credit for concurrent medical decisions to each title, dividing the minutes by 60 to determine work hours, and then dividing by 2080 to determine workyears.

(For example,to determine Title II: (20,485 T II decisions + 50% of 13,096 concurrent decisions) times 64.4 minutes equals 1,740,944.64 minutes of work. Divided by 60 to determine hours and by 2080 to determine workyears. This totals 13.95 workyears of support attributable to Title II)





## **SOCIAL SECURITY**

Office of the Commissioner  
Office of Strategic Management

DATE: October 2001

TO: Larry Massanari  
Acting Commissioner of Social Security

Attached is the final evaluation report for the Disability Claim Manager (DCM) test. This cover memorandum contains summary results from the DCM process assessment along with my recommendations.

### **Background**

The DCM concept was included as part of the Agency's disability redesign plan released in September 1994. The position was a key feature of the plan, providing a focal point for the claimant through the initial-level claims process, with authority to develop and adjudicate both medical and programmatic aspects of the case.

The concept was envisioned as the last piece of the redesign process to be put into place, dependent on the development of support through technological improvements and a simplified decision methodology. Testing was undertaken to determine the feasibility of the position and potential impacts on customer and employee satisfaction, accuracy, processing time, allowance rates, productivity, and costs—while enablers continued under development.

In August 1996, SSA management, the American Federation of Government Employees (AFGE), and the Disability Determination Services (DDS) met and agreed upon a collaborative approach to launch the three-year DCM pilot. Both federal and state employees were selected to become DCMs and training began in November 1997. Formal evaluation of the process began in November 1999 and ran through November 2000. DCM sites continued operation through June 2001 to allow for a smooth transition to close test site operations.

### **Assessing Results**

Test results were mixed. DCMs were able to learn the scope of the job and there were positive outcomes in a number of areas including employee job satisfaction, customer service satisfaction for denied claimants, and processing time. Results also indicated that operating costs were higher as compared to the current process. Additionally, substantial resource investments were required for training and for building an infrastructure to support DCM case processing units.

Along with DCM test outcomes, other factors must be considered in formulating recommendations and/or making decisions. These include potential impacts of changing our current federal/state relationship. Agreements with participating states were necessary to permit testing the DCM process. Implementation of this process would require statutory and regulatory changes to authorize federal employees to make medical determinations (without obtaining state agreements) and to authorize state employees to effectuate federal benefit entitlements.

Additionally, to completely assess next steps for the DCM, changes that have occurred within SSA since the original test was launched must be considered. These include:

- Status of enablers: Expected technological support is still not available. Work is underway to both define and achieve an electronic disability claims process, which was considered an enabler of the DCM process. Achieving this support is still years away.

Research in the area of a simplified methodology has moved the Agency in another direction. Instead of a radical change, as envisioned in the original redesign plan, the focus is on updating and revising the medical listings to reflect the latest developments in medical science. Additionally, the Agency anticipates that these revisions will require major investments in adjudicator training to implement regulatory changes over the next several years.

- Agency focus: The President's Management Agenda and OMB's guidance have underscored the need for SSA to give priority focus to three specific areas: implementing the *Ticket to Work* program, updating disability medical listings, and implementing the prototype process. These areas will continue to receive priority attention and resources over the next several years.
- Release of SSA's Service Vision: In August 2000, SSA released a Service Vision as a longer-term planning tool for addressing future workload challenges as members of the baby boom generation reach their peak years of disability risk and then begin to retire; and, as customer service expectations change based in part, to rapidly changing technology. SSA is currently developing more specific details to describe the Service Vision and preparing analyses to integrate its concepts into the Agency's budget and planning processes. Technological enhancements are seen as primary enablers of the Vision and will require development time and substantial Agency investments.

Results of the DCM test must be weighed along with all of these factors; considered within the context of our current environment; and benchmarked against the goals and direction of the Agency's Service Vision.



## Recommendations

Although there are a number of positive outcomes in the DCM test, overall results do not show the level of significance to substantiate priority resource investments. Any further testing and/or rollout of the DCM would require major resource commitments in training, higher operational costs, and new infrastructures necessary to support the process. These added costs would more severely strain budgets as the Agency works to implement significant changes in the disability program over the next several years. Considering DCM test results and outcomes, start-up costs, the lack of enablers, and environmental factors, I recommend that the Agency:

- 1. Does not pursue additional testing or implementation of the DCM process at this time.*
- 2. Consider DCM test results and experiences in Agency planning for our Service Vision*
- 3. Share DCM results and experiences to enhance local and regional service improvement initiatives.*

The attached report provides a full assessment of DCM test outcomes along with environmental factors and impacts. The Agency has benefited from this testing effort and DCM experiences need to be utilized as a planning resource. I want to thank the DDSs who agreed to participate; I want to recognize regional, local and site management and all union officials who provided ongoing support; and I want to commend test participants who remained committed during a long, complex and uncertain undertaking. Collaboration has been critical to testing and I gratefully acknowledge everyone who supported this effort. Of special note, I want thank the DCM team staff, who worked tirelessly in the development, evaluation and coordination of all aspects of the DCM test over the last several years.

Sue Roecker, Acting Director  
Office of Strategic Management

cc:  
Executive Staff  
AFGE General Committee  
NADE  
NCDDD  
NCSSMA





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## SOCIAL SECURITY

Office of the Commissioner

October 19, 2001

Mr. Witold Skwierczynski, President  
AFGE Council 220  
P.O. Box 617576  
Chicago, IL 60661-7576

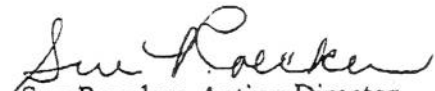
Dear Mr. Skwierczynski:

As stated in my letter to you dated August 15, 2001, I would provide you with a more specific response regarding AFGE comments on the *DCM Draft Evaluation Report*.

We have considered all of the union's comments. Based on your input as well as the suggestions made by other stakeholders, we have made a wide variety of modifications to the report. Major comment themes and how these themes were addressed are outlined in Appendix VII of the final report.

We have enclosed a copy of the *DCM Final Evaluation Report* and have sent an electronic copy to you via e-mail. If you have any questions regarding this matter you may contact Mr. Vince Sabatino on (410) 966-8331.

Sincerely,

  
Sue Roecker, Acting Director  
Office of Strategic Management

Enclosure

cc:  
Ken Keillor  
Al Siemek

## Executive Summary

### Background

The Disability Claim Manager (DCM) position was created as part of the Agency's overall disability process redesign plan as a potential means to improve the initial disability process. Under the DCM model a single individual:

- Acts as the key contact for claimants throughout the initial claims level;
- Explains their role as a primary point of contact, and advises claimants what they will be asked to do and what they may expect from SSA;
- Explains the disability process and programs requirements, including the definition of disability; and
- Assumes responsibility for processing both the medical and programmatic aspects of the initial disability claim.

The DCM model is a significant change from the current process where a SSA claims representative (CR) is responsible for the initial contact with claimants, collecting non-medical information and disability source information, while a DDS disability examiner (DE) has responsibility for collecting and evaluating medical evidence. The current process, as governed by the Social Security Act and underlying regulations, splits case processing and adjudication responsibilities.

The initial phase of the test (Phase 1) focused on training and acquiring on-the-job experience. The formal evaluation (Phase 2) began November 1, 1999 and ended November 24, 2000. The test involved six regions, 36 DCM site locations (20 federal, 13 state, and 3 combined federal/state sites). Phase 2 started with 193 DCMs (110 federal and 83 state). DCM workloads consisted only of initial adult disability claims, excluding Title XVI Childhood claims. A control group, consisting of the same type of claims, was identified for comparative purposes.

### DCM Test Results and Assessment Factors

The impact of DCM test results were assessed in nine areas including accuracy, processing time, allowance rates, productivity and cost, claimant satisfaction, employee job satisfaction, position support needs, and DCM in prototype. A summary of results is described below.

**Accuracy of Adjudication:** Overall performance accuracy for medical disability determinations was comparable between the DCM and control group, though DCM denial accuracy fell below the regulatory threshold. DCM non-medical case and dollar accuracy for Title II was comparable to the FY 2000 Index of Dollar Accuracy (IDA) review. DCM Title XVI non-medical case accuracy was significantly higher. Title XVI dollar accuracy was comparable.



**Processing Time:** Median processing time for DCM claims was about 10 days faster for Title II and 6 days faster for Title XVI. Factors that may have impacted processing time results in both the DCM and control groups include:

- DCM sites' ability to control the volume of appointments/claims;
- Insufficient resources received by the DDSs nationwide to process all their receipts during the test period;
- Movement of state DCM claims for triggering;
- Limited accessibility of medical consultant resources by DCM staff in some sites; and
- Overtime provided to process control cases in some sites, while overtime was not available to process DCM cases.

Data analysis could not provide the degree of impact any of these factors had on processing time.

**Allowance Rates:** The initial allowance rate for the DCM group (43.8%) was comparable to the control group (43.6%).

- 1) Claimants from the DCM group filed for reconsideration 2.2% less often than claimants in the control group. The allowance rate for reconsiderations for DCM cases was 1.7% higher. The cumulative allowance rate *through reconsideration* was comparable (47.4% for DCM and 47.1% for control).
- 2) Results to date show a higher volume of DCM claimants requested hearings; however, hearing data has not yet stabilized and no conclusions were drawn.

**Productivity and Cost Efficiency:** Assessments of cost and productivity were the most complex part of the evaluation. Because the Agency has no single measure to capture productivity and cost for blended federal and state functions, Agency measurement tools and assumptions were used to build unique productivity and cost models to roughly estimate DCM cost/productivity as compared to the current process. More precise productivity and cost calculations for the DCM model were not possible due to the difficulties inherent in the current split management information (MI) processes.

Productivity models in the evaluation include both a modified FO-based calculation and DDS-based calculation to estimate results. These two models were used as a means of comparing the DCM process to the current process at the national level (not compared to the control group).

**Productivity Results:** Estimated productivity of the DCM process derived from the calculation models reflected a range between 14 percent less to 8 percent more than the current process.

**Case Processing Costs:** Estimated DCM costs to process an initial claim were higher than the current process. Cost assessments were based on the models used

to determine productivity. Cost calculations were estimated within a range about 7-21% higher than the current process. To a large extent, DCM case processing costs are driven by the level of productivity; but are also impacted by higher salary and medical evidence costs.

- **Staff Salaries:** Staff selected for federal DCM and Claim Support Specialist (CSS) positions, as well as some state DCMs, received temporary promotions.
- **Medical Costs:** Based on case information collected through the DDS on both DCM and control group cases, quantifiable data showed that medical evidence costs were higher for DCM cases.

Higher salary and medical evidence costs support a conclusion that DCM case processing would be more costly, even if productivity were comparable.

**Additional Cost Considerations:** Cost comparisons between the DCM and the current process do not identify or consider start-up cost factors. Additional costs include: outlays associated with building an infrastructure to support the DCM process; federal and state cross-training; mentoring and coaching time; and loss of productivity during the training and learning curve. Ongoing costs to maintain the DCM infrastructure and technical skills would also be higher than the current process.

**Customer Service Satisfaction Results:** Denied claimants were more satisfied with the DCM process than claimants denied in the current process, as represented by the FY 2000 Agency survey of initial disability applicants. Customer satisfaction survey results were comparable overall for those claimants awarded benefits. Both awarded and denied claimants rated the DCM process higher in categories of helpfulness, courtesy, job knowledge and time spent with the claimant.

**Employee Job Satisfaction Results:** Employee job satisfaction was higher for both state and federal DCMs as compared to their former positions. Job satisfaction remained essentially the same when comparing survey results from Phase 1 to Phase 2.

**Support Staff Assistance:** The DCM, as envisioned in the redesign plan, was expected to be the final piece of the new process to be put into place. Enablers, including major support from technology, were expected to provide a foundation for the new position. The DCM process was tested in advance of any enablers to determine the feasibility of the position and potential impacts and benefits of the process. Because enablers were **not** available, the Claim Support Specialist (CSS) position was created to provide some of the support needed for the process. The contributions of CSS support to the DCM process could not be discreetly identified. Additionally, the use of the CSS positions varied from site to site. DCMs and site coordinators identified a greater need for clerical support than paraprofessional support (CSS).



**DCM in the Prototype Process:** There were 7 DCM sites in 3 states (AL, CO and MI) operating under Prototype guidelines. There were no marked differences between DCM and the control group outcomes for initial allowance rates, processing times, and pre-effectuation review (PER) accuracy. Results thus far show a higher volume of claimants from the DCM group requested hearings, although hearing data has not yet stabilized.

**Environmental Factors:** Environmental factors were considered as part of the overall evaluation of the DCM process. Critical factors include:

*Consideration of Federal and State Relationship:* Both federal and state employees were trained and utilized as DCMs. Agreements were needed from both the state DDSs and AFGE to conduct the test. Implementation of a DCM process, as tested, would require regulatory and statutory changes to permit federal employees to make medical determinations and to permit state employees to make non-medical eligibility determinations. Additionally, there are significant pay disparities between federal and state employees that were exacerbated in a test where federal and state employees performed the same job functions for differing rates of pay.

*Technological Enablers Still in Development:* Work is still underway to both define and achieve an electronic disability claims process that supports case processing for all SSA/DDS components. This is a long-term effort.

*Other Considerations:* Over the last several years SSA has made significant resource commitments to support a number of initiatives currently underway and has expanded its mission to help disabled beneficiaries return to work. An evaluation of the DCM process must be considered in the context of this changing environment, consistent with the goals and direction of the Agency. These considerations include prototype testing, updating the medical listings, and implementing the *Ticket to Work* program.

### **General Conclusions**

- There was a mix of outcomes from the DCM test. Although the DCM process showed improvement in a number of areas; overall test results do not make a compelling business case for continuing DCM testing efforts or for making resource commitments to implement the process.
- Case processing costs for both salary and medical evidence were substantially higher for the DCM process.
- Training and infrastructure changes needed to support additional testing and/or rollout would add further to the costs. The combination of costs would further strain Agency resources.

- The long-standing legislative and regulatory structure of the federal/state relationship would require redefinition to accommodate the DCM process.
- Pursuing further testing of the DCM within our current paper claims environment would not provide additional data to help determine if or how DCM attributes could fit into an automated, paperless process.
- There were valuable insights and lessons learned from the DCM test experience that can be used as a resource, as more detailed planning is undertaken for the (2010) Service Vision.

*Cross-training* employees to specialize in both state/federal functions is a viable concept, however, it requires a significant investment of resources (both in dollar and human capital).

*Combining FO/DDS functions* emphasizes the need for a unified *measurement system* to capture workload receipts, pending and clearances.

*Knowledge sharing* between federal and state DCM staff increased awareness & appreciation levels for their respective functions.

*Sharing state/federal resources* helped identify training needs, improved communication and moved the Agency closer to the "One SSA" concept.

Knowledge and experience gained as a result of the DCM pilot can help in our continuing efforts to improve customer service. Applying such insights, however, must take place within the context of the Agency's long range Service Vision and in alignment with other initiatives. Clearly there are aspects of the DCM initiative that support the Vision (e.g., providing customers with a single point of contact). A number of other key Agency initiatives may also contribute to the Vision, but none of these initiatives can be considered in isolation. DCM experience, along with other national, regional, state and local initiatives, could collectively help shape the future path of the Agency as we seek to broaden our case processing options.



## I. Disability Redesign Overview

SSA and State Disability Determination Services (DDSs) have continually worked to provide high-quality, responsive service to the public. Despite these efforts, in the early 90's disability workloads became the Agency's most challenging problem. Even with improvements in productivity by all components, SSA was having difficulty providing a satisfactory level of service to claimants for disability benefits. SSA needed a longer-term strategy for addressing service delivery problems in the disability claims process.

Throughout the 90's, agencies were called upon to establish customer service standards equal to the *best in business* to guide their operations. Federal agencies were encouraged to identify "the customers who are, or should be serviced by the agency," and survey these customers "to determine the kind and quality of services they want and their level of satisfaction with existing services". SSA looked at their disability customers, including those filing for Disability Insurance (DI) and/or Supplemental Security Income (SSI) disability benefits and potential filers for those benefits. Focus groups conducted throughout the country, representing a demographically diverse cross-section of customers indicated that they:

- Waited too long for a decision—this was the most common complaint; the claim process was a struggle characterized by stress, fear, and the anger associated with running out of funds;
- Did not understand the program or process—what happened to the claim after initial contact with SSA was unclear and applicants did not understand the decision rendered on their claim. Many believed the decision was reached arbitrarily; and
- Wanted more information and personal contact—many voiced a preference to deal with one person for all claim business, and an overarching desire was to receive accurate, consistent information from all SSA sources.

In response to these customer concerns, SSA formed a team to explore "reengineering" as a method for updating and streamlining the disability process. The team analyzed the current process, benchmarked with successful private and public organizations, and collected data and information from both external and internal disability customers. The team developed a "redesign" plan, which was a high-level description of how a new process would work. The plan, released in the fall of 1994, provided the framework for improving the disability claims process—from initial contact through final administrative appeal. The five primary objectives for the plan were:

- To be user friendly for claimants and those who assist them;
- To allow cases that should be allowed as early in the process as possible;
- To ensure that decisions are made and effectuated quickly;
- To ensure that the process is efficient; and
- To provide employees with a satisfying work environment.

## Current Process:

SSA's current disability claims process consists of an initial determination and up to three levels of administrative appeal if an individual is dissatisfied with the decision. The 1,300 Social Security field offices (FOs) located throughout the country generally take initial disability claims. Local FO staff request and evaluate information about the programmatic aspects of each person's claim, such as whether or not the individual has worked enough to be eligible for DI (Title II) benefits or whether the individual meets the income and resource limits for SSI (Title XVI) benefits. FO staff also obtains information about the claimant's impairments, including medical and vocational sources and information.

If the claimant fails to meet the non-medical eligibility criteria, the claim is denied and no decision is made regarding the claimant's impairments. Otherwise, the claimant's medical information is forwarded to the federally funded, but state-administered, DDS, in the State where the claimant lives. DDS staff obtains and reviews necessary medical and other evidence. An adjudicative team consisting of a disability examiner (DE) and a program physician (medical consultant) make the disability determination based on Social Security regulations. The claimant is notified of the medical decision and the file is returned to the FO for any necessary payment effectuation actions or folder retention, completing the initial application process.

An individual who is dissatisfied with the initial determination may request a reconsideration of the decision. If the decision at the reconsideration level remains unfavorable, a claimant may then request a hearing before a federal administrative law judge (ALJ), and, if still dissatisfied, the individual may request an Appeals Council review. Each level of review involves multi-step procedures for evidence collection, review, and decision making. If the Appeals Council affirms the denial, the applicant can begin a civil action in U.S. district court.

## Redesigned Disability Process:

SSA's redesign plan contained a series of improvements including:

*Process Streamlining:* SSA's current four-level administrative process is streamlined to two levels, eliminating both the reconsideration and request for Appeals Council review levels of appeal. Applicants who receive an initial claim denial (level one) have 60 days to request a hearing before an independent ALJ (level two).

*New position at the initial level to act as the claimant's primary point of contact:* A new position, the disability claim manager (DCM), was created as the key contact for claimant throughout the initial level, eliminating steps caused by numerous employees handling discrete parts of the claim. The DCM handles both disability and programmatic aspects of the claim, using the expertise of other staff as needed.



*Claimants better able to understand the program and are more involved in the process:*

Claimants are provided a more intensive explanation of the disability program and process, have additional opportunities to interact with the decision-maker, and can more fully participate in the process itself.

*Process unification:* The objective of overall process unification is to achieve similar results on similar cases at all stages of the process through consistent applications of laws, regulations and rulings.

*More effective utilization of the experience and expertise of staff:* Changes in the adjudicative process would free time for the most highly specialized staff (physicians and ALJs) to work on those cases and tasks that make the best use of their talents.

Since release of the redesign plan, SSA has tested a series of initiatives to determine the potential for customer service improvements. The Agency has moved to operationally test the most successful features from prior testing into larger state prototypes (process models), which are currently underway in 10 States. When complete information is available the Agency will be able to make decisions on the future of the prototype model. Plans call for national phased implementation of this process in fiscal year 2003. This model:

- Provides greater decisional authority to the DE and makes more effective use of the expertise of the medical consultant (MC) in the disability determination process. The DE has the authority to decide when and how to use MC support on some cases. The Statute continues to require sign-off by the DE/MC team on Title II/Title XVI less-than-favorable decisions in cases having an indication of a mental impairment, or involving Title XVI childhood disability. This process maximizes the effective use of agency resources, focusing state medical and psychological consultants on duties and responsibilities commensurate with their professional training and experiences.
- Enhances documentation and explanations of decisions in the case file.
- Affords claimants with an opportunity to speak with the disability decision-maker at the initial level, if evidence is insufficient to make a fully favorable determination.
- Eliminates the reconsideration step of the administrative review process and provides claimants, who are dissatisfied, the option of appealing directly to the ALJ at the hearing level.

While moving ahead with the prototype process SSA concurrently tested the DCM concept. Following is a brief background of the DCM process and test.

## II. Disability Claim Manager Test Background

### The DCM Test:

Under the DCM model, a single individual has responsibility for both the medical and non-medical aspects of the initial disability determination process. This model is a significant change from the current process, where a SSA claims representative (CR) is responsible for the initial contact with claimants, collecting non-medical eligibility information and medical source information while a DDS disability examiner (DE) assumes responsibility for collecting and evaluating the medical evidence. This bifurcated process splits case processing responsibilities and often results in confusion for claimants.

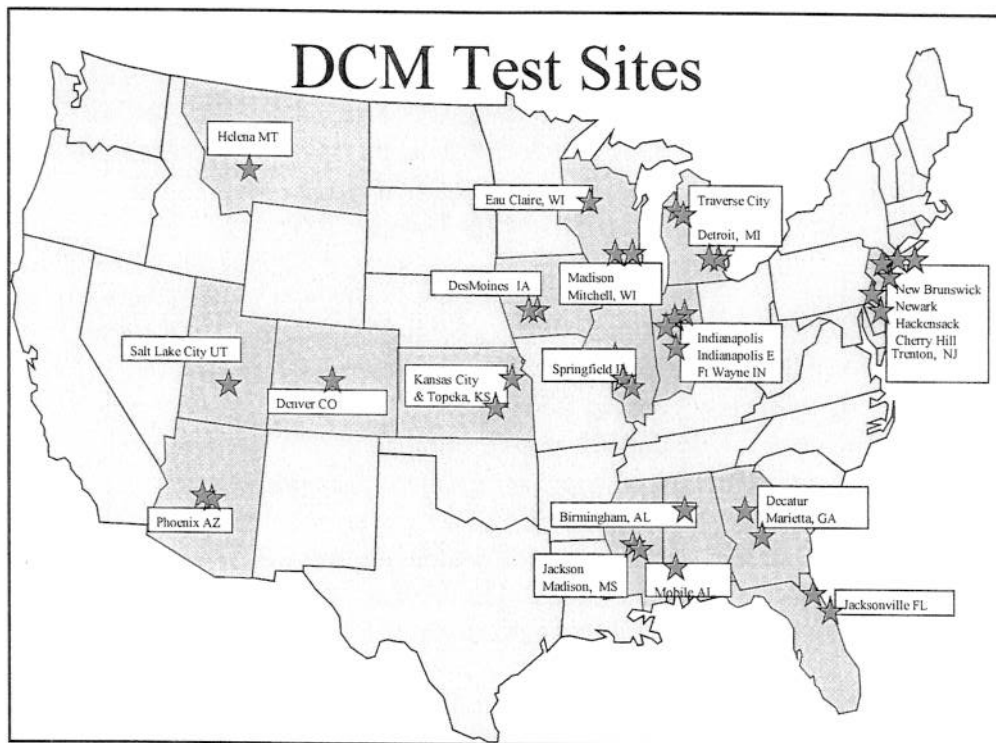
The DCM combines functions from both the CR and DE positions and provides claimants with a focal point throughout the initial disability process. The DCM explains the disability programs to the claimant, including the definition of disability and how SSA determines whether a person meets the requirements. The DCM also explains their role as primary point of contact, and conveys what the claimant will be asked to do and what the claimant may expect from SSA.

The position has been developed as one of the redesign initiatives under leadership of the Disability Process Redesign Team (DPRT). DPRT envisioned moving to the DCM through an incremental approach, in which employees would initially operate in a team environment and would perform some DCM functions as they developed additional skills and abilities. Additionally, support for the DCM process was expected through interrelated technological improvements, a simplified decision methodology, and a single set of standards for decision-making. These enablers were to provide a foundation upon which to build the DCM position.

Early in 1996 SSA accelerated the DCM pilot to determine the feasibility of the position, while continuing to develop expected enablers. The model was developed as a “proof of concept” test to determine whether a single individual could successfully perform the broad range of job functions. DPRT convened a workgroup to develop the position and make recommendations about procedures, personnel, training, and testing of the new position.

Mutual stakeholder agreement was needed in order to conduct the DCM test, since it combines federal (non-medical factors of entitlement) and state (medical entitlement) responsibilities. Stakeholder groups, comprised of representatives from SSA management, AFGE, and the DDS, met and agreed upon a collaborative approach to launch the DCM pilot.





Fifteen states agreed to participate in the test and SSA and AFGE agreed on 33 sites. For the test, 115 federal DCMs (FDCM) and 104 state DCMs (SDCM) were selected. The DCM units were primarily set up within FOs for the FDCMs and DDS locations for the SDCMs, although six sites combined federal and state employees. Subsequently, three of the six combined sites each separated into one federal and one state site, yielding the final total of 36 DCM sites. *(See Appendix I for more detailed information on the DCM sites.)*

***DCM Test Phases:*** The DCM concept was tested in two phases. Phase 1, which focused on training and the learning curve, began in November 1997 and ended in June 1999. Because the Phase 1 assessment supported the viability of the position, the project continued to Phase 2 for a formal evaluation of the overall concept. Phase 2 began November 1999 and ended in November 2000.

During the test, DCMs processed only initial, adult disability claims. Title XVI childhood disability claims and disability claims that required manual processing were excluded from DCM processing during Phase 1. Only childhood claims were excluded during Phase 2 because additional training would have been required for the DCMs, which would have delayed the start of Phase 2.

***DCM Training:*** Because the DCM position combines the technical knowledge of both a CR and a DE, there was a significant investment in up-front training. DCM training and the learning curve were achieved before the beginning of the Phase 2 evaluation.

*Programmatic Training for State DCMs:* The SDCMs received programmatic technical training based on the standard Office of Training claims representative training packages. The duration of training was 15 weeks, which included:

- 4 weeks classroom Title II training followed by 2 weeks of on-the-job (OJT) training; and
- 6 weeks Title XVI training followed by 3 weeks OJT.

*Medical Training for Federal DCMs:* The FDCM medical training was based on the standard Office of Training disability examiner package. Total training time was 30 weeks, which included:

- 8 weeks of medical classroom training;
- OJT in their State DDS for 5 ½ months; and
- Additional programmatic (crossover) training, as needed.

*Coaching:* Once the formal OJT was completed, the trainees reported to selected DCM sites where coaches were assigned to the trainees. Coaches reviewed DCM progress and provided case feedback and advanced training through Phase 1.

*Federal DCM Backfills:* Before the completion of Phase 1, thirteen FDCMs were selected to fill vacated positions. Eight of the “backfills” received training prior to the start of Phase 2, while the remaining five received training during the evaluation phase. All of the backfills received classroom training. FDCMs generally provided OJT for the backfills in the sites, although two states opted to provide trainees’ OJT in the DDS. Anecdotal information indicated this training was adequate, although coaching the backfills during Phase 2 may have impacted DCM productivity at the site level.

*Claim Support Position Added to the DCM Process:* The claim support specialist (CSS) position was created as paraprofessional support for the DCM process since testing began prior to the development of needed process enablers such as major support from enhancements in technology. The functions of the CSS included:

- Medical case processing support for the FDCMs and following up on medical information.
- Claims support for both federal and state DCMs.
  - handling appointment calendars;
  - processing auxiliary claims and representative payee applications;
  - resolving earnings discrepancies and SSN issues plus other support activities.

Seventy-five CSSs were selected for the test based on the expectation that a ratio of roughly 1:2 would be needed to provide the level of support needed by FDCMs. Fifteen of these CSS positions were originally expected to support FDCMs in Disability Processing Centers (DPCs). DCM sites were never established in DPCs, so the 15 CSSs were absorbed in other DCM sites. CSSs were also expected to provide varying levels of support to state DCM units, although for-the-most part CSSs were not co-located with SDCMs. Placement of CSSs was not done based on a DCM to CSS ratio per site, but



rather where there was workspace available. This resulted in an uneven distribution of CSSs. CSSs were not used in a consistent manner throughout the DCM sites. Additionally, the work produced by CSSs could not be isolated in MI reports. CSS time and work clearances were captured as part of the cost and productivity analysis in evaluating the DCM process. The CSSs supported work done by the DCMs and impacts of the CSS were assessed based on anecdotal information.

***Federal and State Relationship:*** Both federal and state employees were trained and utilized as DCMs. Agreements were needed from both federal and state leaders and AFGE to conduct the test and determine workflow and adjudication processes. These agreements were made only for conducting the test. The evaluation was not designed, nor intended, to provide data as a comparison of federal and state DCMs--results combine federal and state experience. Implementation of a DCM process, as tested, would require regulatory and statutory changes to permit federal employees to make medical determinations and to permit state employees to make non-medical eligibility determinations.

***Outside Contractor Support:*** SSA contracted with the Lewin Group to provide external, independent support in assessing the DCM test. SSA asked Lewin to provide advice and support to the DCM project manager regarding the design and adequacy of the test protocol, test procedures, creation of a database, and data collection processes. At the conclusion of Phase 1, Lewin made recommendations for improvements before beginning Phase 2 and, assisted DPRT with the analysis and assessment of the DCM learning curve and early test findings. Their Phase 1 report showed the DCM as a viable approach to processing claims, in the limited sense that certain key outcomes were within the ballpark of outcomes under the current process. Also, there was substantial anecdotal evidence that claimants were more satisfied with the DCM process than with the current process. Further, DCMs were more satisfied with their current work than in their previous positions (generally CR and DE). The Lewin Group concluded that the DCM had the potential to improve the process for both claimants and employees.

DPRT refined the DCM test before the start of Phase 2 testing to incorporate recommendations made by the Lewin Group and to better replicate the current process. DCM appointments (leads) were assigned randomly as in the current process, and leads included all initial **adult** disability cases. (The only exclusion continued to be SSI childhood disability claims.) For Phase 2, a control group was established to reflect a comparison of randomly assigned leads of the same type and from the same source as the DCM group.

## **Evaluation Methodology:**

**Evaluation Roles and Responsibilities:** Internal SSA components, DDSs, regional staff, local management, and the Lewin Group provided continuing support throughout the testing operation.

- ***Disability Process Redesign Team (DPRT):*** DPRT worked with the SSA components, state management and unions, federal management, and AFGE to design and

implement the Phase 2 evaluation plan. DPRT staff monitored test site operations and ensured that test and data collection procedures were followed throughout the course of Phase 2. As part of the monitoring function, DPRT staff provided regular feedback (progress reports) to the test sites and staff regarding their ongoing activities and assisted regional staff with resolution of issues where national procedures were involved. DPRT developed and maintained an analytical database and conducted activities associated with the process evaluation and was responsible for compiling the evaluation results into a draft report.

- Regional Implementation Coordinators (RICs): There was a RIC in each of the six regions participating in the DCM test. They provided the link between DPRT and the sites for communications and data collection. Additionally, RICs coordinated travel, training and site visits. They worked in partnership with AFGE regional and site representatives as well as DDS management in oversight activities and were instrumental to the evaluation effort.
- Site Coordinator (SCs): Each site was assigned a site coordinator who was responsible for establishing workflow and coordinating efforts with the area director's office to obtain DCM appointment leads. SCs also worked with the RICs and local union representatives on a routine basis and reported information not routinely collected in the claims process to support the evaluation.
- Office of Quality Assurance and Performance Assessment (OQA): OQA was responsible for reviewing and providing information on the accuracy of DCM and control group medical and non-medical decisions. OQA worked with DPRT to develop, implement, and analyze the findings from claimant surveys conducted for the DCM group of claims. Results from the DCM claimant survey were compared with customer satisfaction in the current disability process, as measured by the fiscal year 2000 Market Measurement Program (MMP) customer segment survey of initial disability (DI) applicants.
- Office of Workforce Analysis (OWA): OWA developed, implemented, and analyzed the findings from the employee and management surveys and provided valuable insights on the assessment of productivity and cost. OWA staff also participated in site visits conducted during Phase 2.
- Other SSA Components: Other components of SSA were involved in the design and implementation of the Phase 2 evaluation. Staff from Operations (DCO) and the Office of Disability (OD) assisted DPRT in coordinating activities with the regions and the DDSs, respectively. SSA's national 800 Number Teleservice Centers and FO staff participated in the random assignment of leads to test and control groups through the 800-number leads system. Staff from the Office of Information Management (OIM) was consulted regarding the sources, formats, and means for collecting data from SSA's administrative systems. Area directors in DCM states were instrumental in establishing sufficient numbers of DCM test and control group leads for Phase 2 and obtaining the participation of all impacted local FOs.



- *The Lewin Group, Inc.*: The Lewin Group provided design recommendations for the evaluation, which were delivered to SSA in January 2000. They reviewed and presented an assessment of the findings and interpretations of the Phase 2 evaluation report and remained available for consultation.

### Test and Control Group Samples:

Phase 2 was a blind test and employed a random assignment of appointments (leads) for both the test and control sample groups (DCM and current process sample groups). DCM leads were identified for DCM processing, while the control group leads were handled under the current process with no special identifiers. Randomness was accomplished by:

1. Utilizing SSA's national 800 number leads system;
2. Having the same type and source of leads for the test and control groups; and
3. Having teleservice representatives (TSRs) and/or FO staff schedule leads into pre-identified FO calendar appointment time-slots using one of several methods.

The methods of lead assignments used were:

- Pre-established times slots on the relevant FO calendars that were for the DCM and control groups only;
- Selected terminal digits for the DCM group and separate selected terminal digits for the control group;
- DCM appointment calendar. When a TSR pulled up the FO calendar to schedule an appointment, the remarks on the calendar directed them to schedule the appointment directly on the DCM calendar. Corresponding control cases were assigned by terminal digit. *(See Appendix II-1 & 2 for detailed information on the random lead process and verification.)*

The Lewin Group recommended using the lead as the starting point for data analysis. The Agency does not normally capture information from the point the lead is taken and there is no automated historical record of this data. For the evaluation of the DCM process, the claim (rather than the lead) was used as the basis for analysis for two reasons:

- Clientele actions: If the client's application process was started in either the DCM or control groups, the client could disrupt the test, unknowingly, by filing or returning their claim to an office which differed from the location identified on the appointment calendar. For example an appointment taken over the phone by a DCM is returned in person to a field office; and
- Manual reporting of leads: Lead reports were maintained by the DCM sites and were subject to human error. Discrepancies were identified in some of the site reports.

Client actions and discrepancies identified with manual reporting of leads made the use of any lead data analysis inaccurate.

**Data Collection:**

Data pertinent to the key issues of the test were collected and analyzed using standard SSA and DDS statistical data and terminology where possible. The specific types of data collected and their sources are covered in greater detail in the Key Issues and Appendices sections of the report. Data observations for the areas of processing time, accuracy (medical), and allowance rates were based on comparing the DCM claims to a specified volume of control claims.

Three of the fifteen States participating in the DCM test (Alabama, Colorado and Michigan) also functioned as “Prototype” states during Phase 2. In these States the disability claims process in the DDSs was modified. Specifically:

- More authority and responsibility was given to disability examiners in making disability determinations;
- More extensive analysis, case documentation, and detailed rationales were required;
- An opportunity for a pre-decisional “claimant conference” was offered before any less-than-fully-favorable decision; and
- The reconsideration step was eliminated.

Having some DCM sites located in prototype states provided a unique opportunity to evaluate the DCM in the prototype environment. Although there were only seven DCM sites in prototype states, there were sufficient cases for making statistically valid comparisons in some evaluation areas. Results of these comparisons for prototype states are located in a separate section titled, “*DCM in the Prototype Process*”.

**Monitoring Activities:**

Site Visits: During Phase 2 of the DCM test, DPRT with the assistance of regional staff, OWA and AFGE visited 18 DCM sites in 10 states. Between January and May 2000 a cross-section of site types were visited, including all prototype DCM sites. During these visits DPRT discussed business practices with the DCM site’s staff, local management and union. A summary of the results, which included best practices and recommendations for improvement, was communicated to the staff at the conclusion of the visit. DPRT also compiled the best practices into a document and shared them with all DCM sites nationwide.

Surveys: A variety of surveys were conducted by DPRT to obtain information in several different areas:

- Staffing - Regions were polled to verify staffing, ensure that staffing was being properly allocated, and to validate staffing arrivals and departures throughout the evaluation phase.
- Site Characteristics - Phone surveys with all SCs were conducted to discuss specific issues related to the functioning of their sites and to identify local workflow variations between DCM sites and the current process.



- *Ad Hoc Surveys* - At various times during the evaluation period DPRT staff members held discussions with RICs and/or SC to assess specific issues or areas of concern.

*Teleconferences*: Regular monthly conference calls were held to resolve issues and provide updates. These calls included all appropriate DPRT, regional office, DDS and regional line management, site coordinators, union representatives, and other headquarters component staff.

*Weekly Lead and Control Feedback*: Regions and sites were provided with a variety of weekly feedback reports. These data were provided to the sites for use in work planning and caseload management. This information also was used by DPRT to ensure work volumes and staffing levels were accurately captured.

*Monthly Reports*: Monthly reports were provided to the RICs and SCs summarizing processing information on a site, state, regional, and national basis. These reports provided information on case processing volumes, processing times and productivity data. DPRT reviewed this data to look for processing trends requiring resolution. It is important to note these reports compared the DCMs with state and/or national data rather than to the control group since there were insufficient data for control group cases until the end of Phase 2. For the evaluation, however, control-group comparison data was being used to the fullest extent possible.

## **Key Evaluation Issues:**

The following sections reflect results from the Phase 2 DCM evaluation. Data results are divided into nine "Key Issues." The methodology for each key issue is discussed in the appropriate section, along with the results and analysis.

- 1. Accuracy of Adjudication**
- 2. Processing Time**
- 3. Allowance Rates**
- 4. Productivity and Cost Efficiency**
- 5. Customer Service Satisfaction**
- 6. Employee Job Satisfaction**
- 7. Support Staff Assistance**
- 8. DCM in the Prototype Process**
- 9. Environmental Factors**

Each key issue includes specific evaluation question(s) suggested by the Lewin Group as key factors in assessing the DCM process. Summary results are displayed in response to each question or series of questions. Additional detail regarding the results is also provided for each key issue with specific data referenced in the Appendices of the report.

The "Key Issue" sections on processing time, medical case accuracy, and allowance rates relate to DCM claims, excluding the claims processed by DCMs in prototype sites. In the areas of technical case accuracy, productivity/cost, customer service satisfaction and employee satisfaction, all case data is combined. Data results from the DCMs in

prototype sites are displayed separately in the section titled, "*DCM in the Prototype Process*".

### III. Key Issues:

#### 1. Accuracy of Adjudication

*Adjudication accuracy was measured by assessing the correctness of both disability (medical) decisions and technical (non-medical) decisions.*

**Evaluation Questions:** *Do the DCMs continue to achieve acceptable levels of adjudication quality? Will DCMs continue to produce high-quality decisions when they are under more pressure to perform and without assistance from coaches?*

##### **Summary Results:**

- **Allowance Accuracy:** The DCM (medical) disability case accuracy (96.9%) for allowances was statistically comparable to that of the control group (96.8%).
- **Denial Accuracy:** The DCM accuracy rate for denials (90.1%) was statistically comparable to the control group (93.3%). Although the difference in the DCM and the control group accuracy rates for denials is not statistically different, it must be noted that the DCM denial accuracy fell below the regulatory accuracy threshold of 90.6%.
- **PER Accuracy:** The DCM accuracy rate of 96.3% was statistically comparable to the control group (97.1%).
- **Programmatic (Non-Medical) Accuracy:** Technical case accuracy and dollar accuracy rates for Title II DCM awards was statistically comparable to the fiscal year 2000 Index of Dollar Accuracy (IDA)<sup>1</sup> review. The awarded DCM Title XVI case accuracy was significantly higher than the IDA review, with dollar accuracy being comparable. There is no denial comparison data available for the IDA review.

<sup>1</sup> IDA results displayed are for initial adult disabled recipients only. Non-medical accuracy outcomes include Prototype results, for both DCM and IDA, since Prototype data could not be delineated.



## Methodology:

The Office of Quality Assurance (OQA) randomly selected DCM and control group cases and conducted reviews using the same standards and procedures as the current process.

- **Disability Quality Assurance (DQA) Reviews:** As required by law, SSA performs a quality review of disability decisions made by each DDS to determine their rate of accuracy. OQA reviews a sufficient case sample volume to provide statistically reliable measurements for the universe of DDS cases<sup>2</sup>. DCM and control group cases were included in the universe of all cases sampled and subjected to the same method of random case sampling and review. OQA isolated the DCM and control group data by performing a match run of Phase 2 DCM and control group SSNs against the OQA databases.
- **Pre-Effectuation Review (PER):** By law PER is performed on 50 percent of all Title II and concurrent Title II/Title XVI initial disability allowances. Targeted cases are identified by certain case characteristics and selected for PER. DCM cases were subjected to the same selection process and procedures; and, at the same rate of selection as in the current process.
- **Programmatic (Non-Medical Claim) Accuracy Results:** OQA conducted a study to assess the accuracy of the non-medical aspects of Title II & XVI disability (DI) claims. For each case sampled, all non-medical factors of eligibility were verified and redeveloped through personal contacts with the recipients/payees and, as necessary, contacts with collateral sources. This is the same procedure used in the current process as part of the ongoing IDA review. For this review, OQA sampled 466 Title II and 452 Title XVI DCM award cases and compared the results with the Agency's 2000 IDA review results, which included 596 Title II & 624 Title XVI adult disability claims. DCM findings were not compared to the control group. DCM/Prototype cases are included in this assessment.

It is important to note that IDA results are normally weighted to project the results to the universe of disability claims, however, the results presented here are NOT weighted. Raw case numbers and percentages are used to compare DCM to IDA using the sampling variability as the point of reference for the comparison. This is consistent with the way the results are presented for the medical portion of the Accuracy section of this report.

## Results:

The following charts display results of medical and technical (non-medical) reviews for DCM and the corresponding control group cases. The DCM and control group selections provided a sufficient number of cases to yield a statistically reliable comparison<sup>3</sup>.

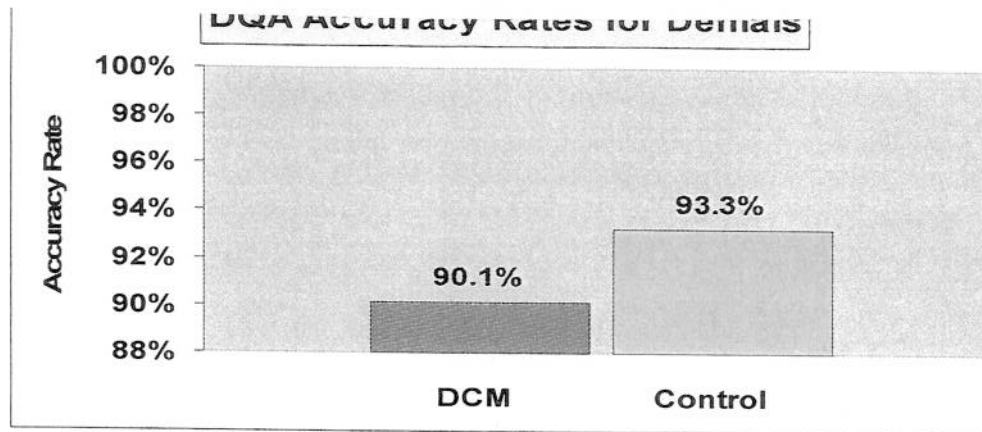
<sup>2</sup> A Description of the Disability Quality Review Process, OQA, ODPQ, 02/10/99.

<sup>3</sup> Sampling variability (S.V.) measures how closely the sample results can be expected to approximate conditions in the universe of cases being sampled. Results are not weighted because it does not involve making projections to the universe of cases.

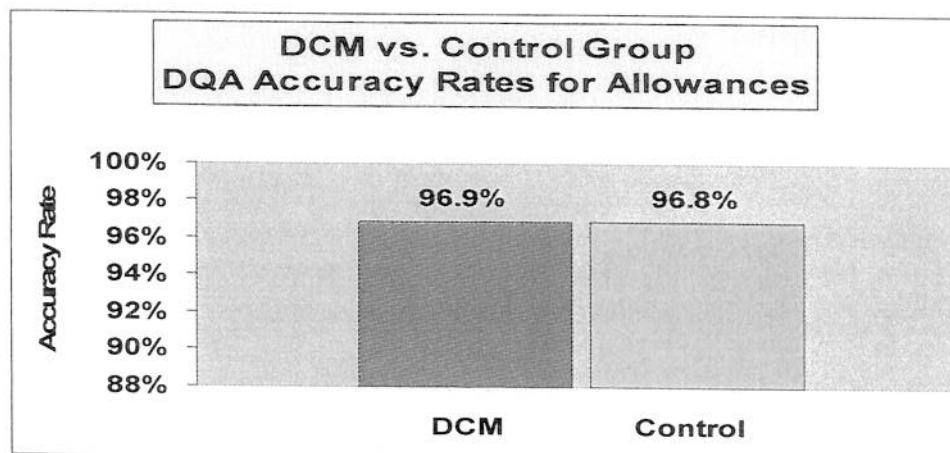
Errata sheet for page 15:

The data tables are in the correct position.

The two graphs are erroneously displayed in reverse order.

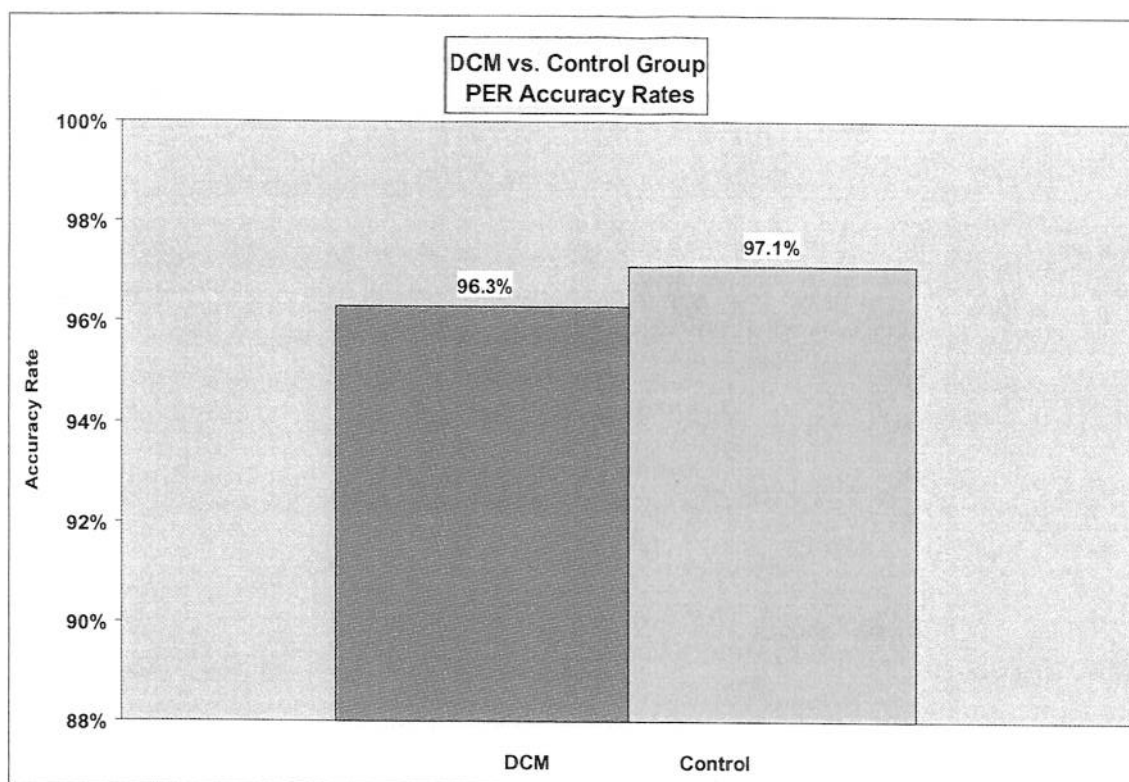


	Number of Cases Reviewed	Number of Error Free Cases	Accuracy Rate
DCM	384	372	96.8%
Control Group	190	184	96.9
Sampling Variability (S.V.)			3.0%
Difference in Accuracy Rates			0.1%



	Number of Cases Reviewed	Number of Error Free Cases	Accuracy Rate
DCM	394	355	90.1%
Control Group	252	235	93.3%
Sampling Variability (S.V.)			4.4%
Difference in Accuracy Rates			3.2%





	Number of Cases Reviewed	Number of Error Free Cases	Accuracy Rate
DCM	4869	4727	97.1%
Control Group	2627	2530	96.3%
Sampling Variability (S.V.)			0.8%
Difference in Accuracy Rates			0.8%

The DCM and control group accuracy rates for the PER were within the sampling variability range and were statistically comparable.

<b>Title II Non-Medical Payment Accuracy -- Awards</b>				
	Number of Cases Reviewed	Number of Error Free Cases	Case Accuracy	Dollar Accuracy
DCM	466	422	90.6%*	99.8%
IDA FY 2000	607	532	87.6%*	97.6%
Sampling Variability (S.V.)			3.8%	3.8%
Difference in Accuracy Rates			2.9%	2.2%
			*data NOT weighted	



**Title II Non-Medical Case Accuracy -- Denials**

	Number of Cases Reviewed	Number of Error Free Cases	Case Accuracy
DCM	188	185	98.5%
IDA FY 2000	N/A	N/A	N/A
			*Data NOT weighted

**Title XVI Non-Medical Payment Accuracy -- Awards**

	Number of Cases Reviewed	Number of Error Free Cases	Case Accuracy	Dollar Accuracy
DCM	452	345	76.3%	92.7%
IDA FY 2000	624	427	68.4%	94.7%
Sampling Variability			5.5%	5.5%
Difference in Accuracy Rates			7.9%	2.0%
			*Data NOT weighted	

**Title XVI Non-Medical Case Accuracy -- Denials**

	Number of Cases Reviewed	Number of Error Free Cases	Case Accuracy
DCM	277	274	98.9%
IDA FY 2000	N/A	N/A	N/A
			*Data NOT weighted

## 2. Processing Time

**Evaluation Question:** Can the DCM process reduce processing times and meet or exceed program processing time goals?

**Summary Results:** Claims completed through the DCM process had significantly faster median processing times for both Title II and Title XVI claims than the control group.

Median <sup>4</sup> Processing Time				
	Title II		Title XVI	
	DCM	Control	DCM	Control
Allowance	64	74	83	77
Denial	73	87	73	86
Technical Denial	1	0	1	0
Overall	67	77	67	73

Note: Processing times are based on claims counts, not on case counts. This means that concurrent filings are counted twice -- once for Title II and once for Title XVI.

### Methodology:

Processing time<sup>5</sup> for the DCM group was compared to the control group. Claims for both groups were excluded from the processing time results if any of the following conditions existed:

- A processing time exclusion applied based on existing Agency standards, such as a missing application date; or
- The claim was filed before Phase 2 began (11/1/1999) or was adjudicated after the evaluation phase ended (11/30/2000); or
- The claim was filed more than 30 days before the randomly identified lead was reported to DPRT.

All other adjudicated claims were included in the assessment of processing time.

The Lewin Group recommended using the “median” calculation to assess processing time in order to account for the volume of claims pending at the close of the data collection period. Processing time was also calculated based on the mean (average). (*Detailed processing time data is displayed in Appendix III 1 - 4.*)

<sup>4</sup> The median is the number in the middle of a set of numbers; that is, half the numbers have values that are greater than the median, and half have values that are less.

<sup>5</sup> Processing time was measured from the application date (or protective filing date) to either date of the denial notice or the date the system completes processing of an award. The MIICR was used for Title II data and SSICR for Title XVI. Overall processing time for DCM and control groups was calculated using the same method(s) as the Agency uses for its Tracking Reports and Performance Plans. Refer to MIM-II 8140 & 8151 (Title 2) and 8530 (Title 16) for more information on processing time computations, and MIM-II 8530 (Title 2) and 8510 (Title 16) processing time exclusions and exceptions.

**Results:**

The median processing time for DCM claims was faster than the control group (on average 10 days faster for Title II and 6 days faster for Title XVI).

**Impacts:**

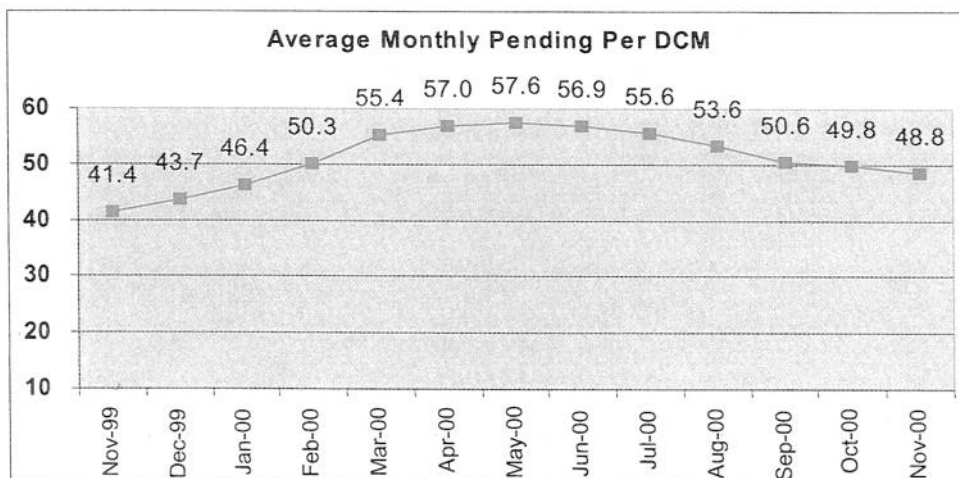
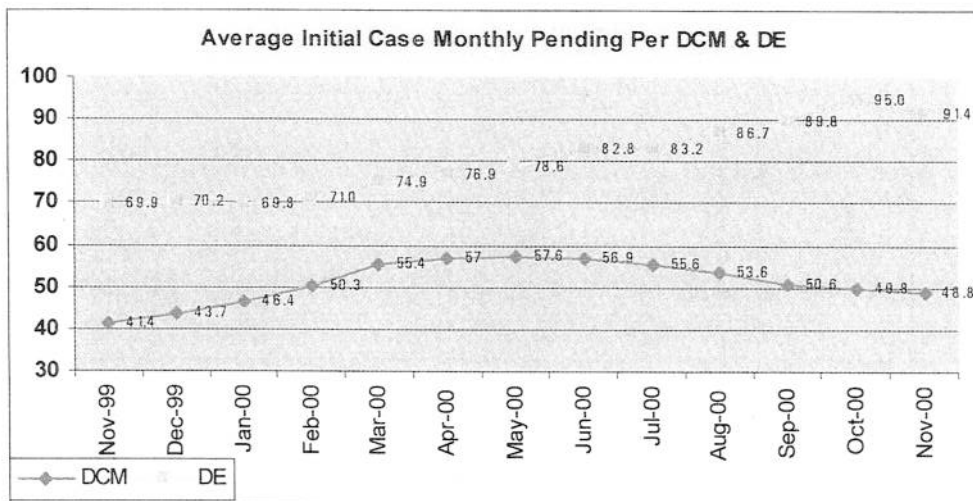
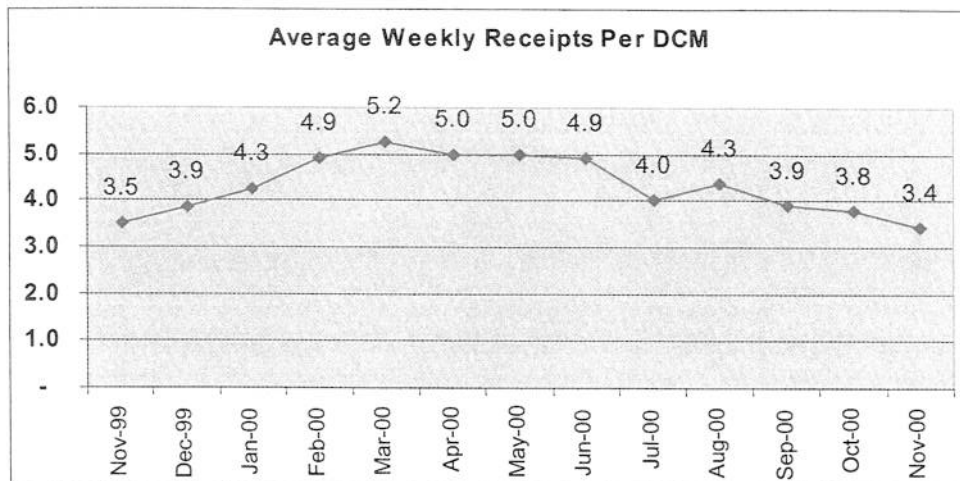
There were a number of factors that may have impacted processing time for both the DCM and Control groups. These factors included that:

- The DCM sites had the ability to alter receipts if workloads were perceived to be unmanageable where the control group did not have the same ability;
- Some DCM sites needed to mail claims for medical consultant input and sign-off;
- DDSs did not receive sufficient resources to process all their receipts during the test period. This caused a significant increase in the initial case backlogs in the DDSs. This increase in backlogs may have adversely effected control group processing time;
- Claims had to be transported to field offices for payment authorization by some state locations; and
- Some of the control group of cases could have been worked on overtime, while overtime was not available to the DCM group.

Several other factors may have impacted processing time including receipts and pending levels and staff on duty. Data analysis did not provide the degree of impact any of these factors had on processing time.

For the first 4 months of the test, the pipeline of cases moved into the process. By the end of February 2000, DCM pending reached an average of 50 cases per DCM and receipts averaged 5 per week. This receipt level was maintained through June. In July there was a sharp drop in receipts, due in part to the need for sites to reduce intake volumes as backlogs built. For comparative purposes the charts below show average DCM receipts and pending for the life of the test. Also included is the average DE initial case pending for the 15 DDSs participating in the DCM test. The DE initial workload does include childhood cases where the DCM pending does not. It is not equitable to compare the volume of pending between the DCMs and DEs since the DCM processes the entire claim and the DE processes the medical portion. What's notable was the proportion of DCM pending did not keep pace with the DE pending for the last 6 months of the test. The last 6 months of the test was also when average DCM receipts declined and average DCM processing time continued to climb.

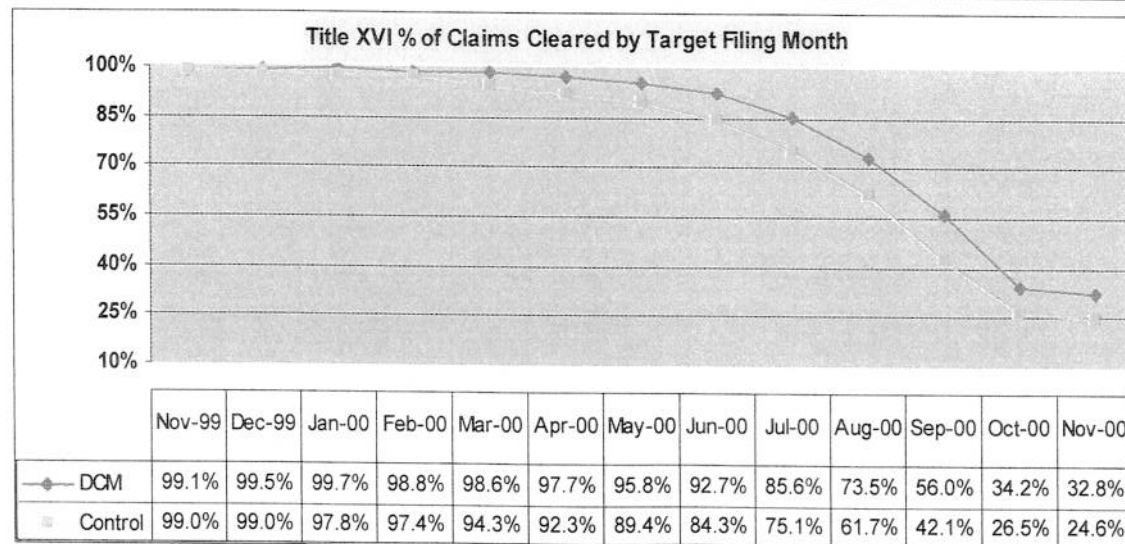
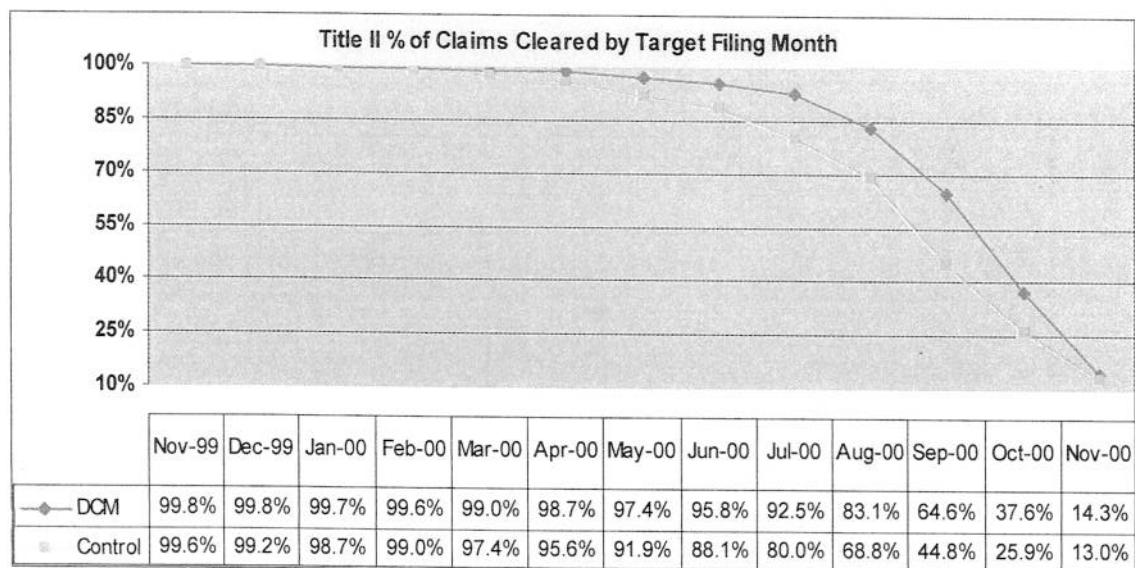




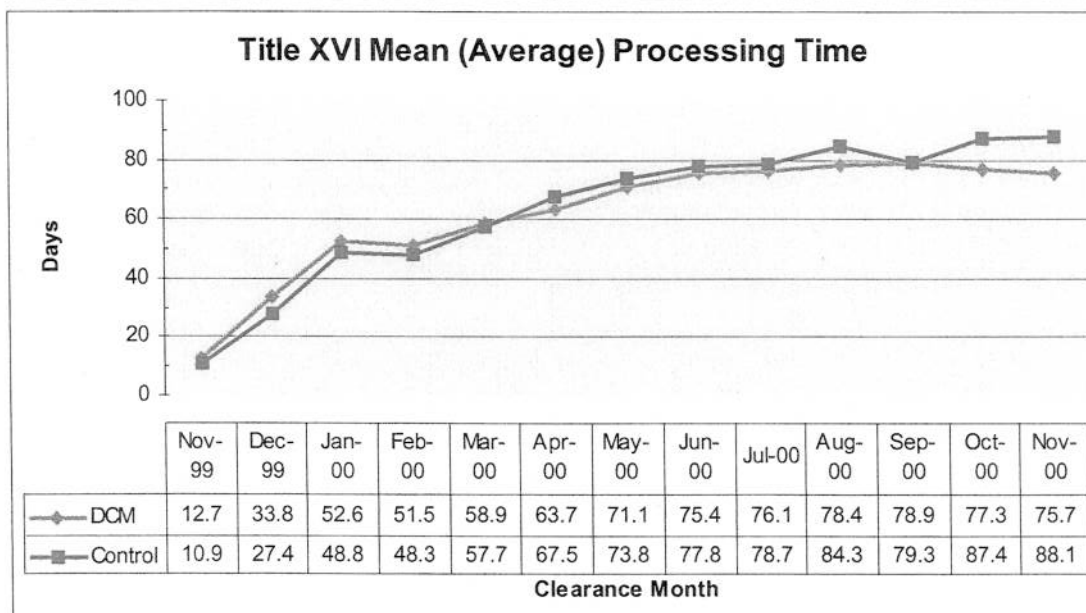
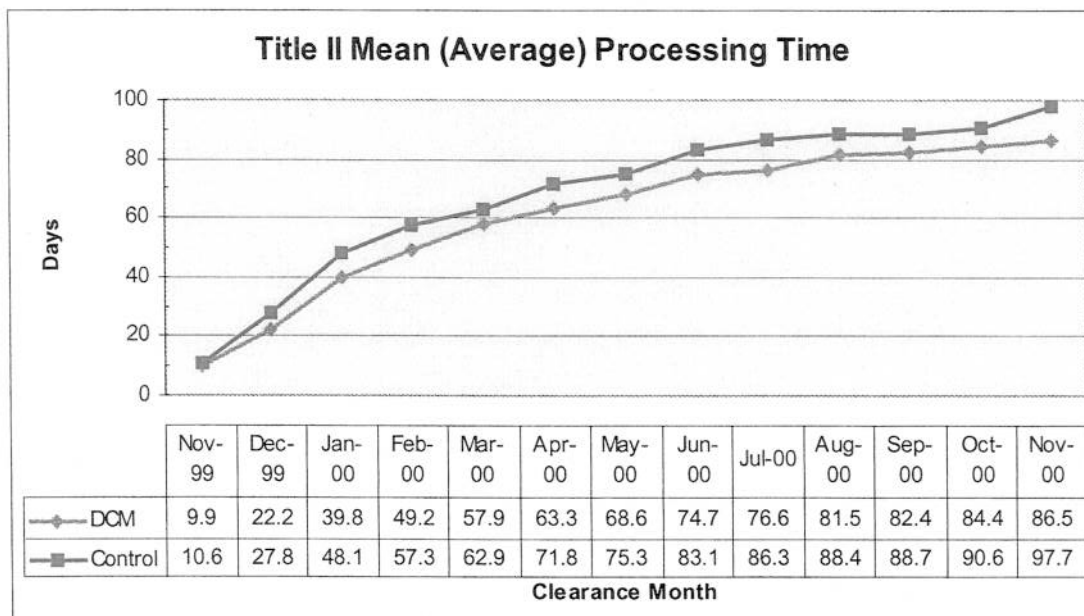
Average DCM staffing remained relatively stable through August 2000. There was a 1.2% attrition rate through May, and 3.2% from June through August. From September through November the attrition rate was 13.9%. Overall the attrition rate was 17%, significantly higher than the combined DE/CR attrition rate 10.1% for the 15 states involved in the test.

Average Monthly DCM Staff	DCMs
11/99 - 5/2000	188
6/2000	183
7/2000	182
8/2000	180
9/2000	173
10/2000	161
11/2000	157

As depicted below, for the first 6 to 7 months of Phase 2 the percentage of claims cleared per month was similar for both groups. Beginning May/June the gap broadened between the percentage of claims cleared in the DCM and control groups. This gap was due, in part, to an increased volume of control claims taken starting in June to ensure a sufficient volume of claims in the control group. At the same time, DCM sites reduced intake volumes due to increasing pending levels. The following graphs and chart depict processing time from several different aspects.



The charts below show average processing time for the DCM and control groups.





**Claims Processing Time by Filing/Cohort Month:** The charts below show the percentage of claims cleared within day parameters (0-30 days, 0-60 days, 0-90 days etc.)<sup>6</sup>.

File/ Cohort Month	Title II DCM Claims						Title II Control Claims					
	Claims Rec'd	Processing Time Percentage Cleared Within "x" Days					Claims Rec'd	Processing Time Percentage Cleared Within "x" Days				
		30	60	90	120	180		30	60	90	120	180
Nov-99	831	14.0%	36.8%	59.3%	77.4%	93.7%	550	8.4%	24.4%	46.7%	65.5%	84.7%
Dec-99	1,396	12.3%	37.5%	63.6%	80.5%	94.8%	790	5.9%	23.9%	48.1%	64.1%	84.8%
Jan-00	1,687	11.7%	38.8%	61.8%	79.5%	94.1%	1,038	9.0%	29.9%	49.3%	67.0%	85.6%
Feb-00	2,017	13.3%	37.9%	58.8%	77.8%	94.1%	1,321	4.7%	23.8%	44.7%	62.8%	83.8%
Mar-00	2,192	13.4%	36.0%	61.0%	78.5%	94.6%	1,421	5.8%	24.5%	45.1%	64.7%	87.8%
Apr-00	1,894	13.9%	38.8%	59.9%	76.8%	94.3%	1,398	6.1%	22.1%	40.5%	61.5%	87.1%
May-00	2,263	17.2%	38.4%	62.2%	80.9%	95.5%	1,688	13.1%	29.0%	48.6%	64.9%	88.0%
Jun-00	2,175	16.7%	39.8%	63.2%	82.3%	95.6%	1,735	13.1%	27.6%	47.8%	68.4%	88.0%
Jul-00	1,644	17.0%	40.8%	65.8%	84.6%	N/A	1,602	13.7%	30.3%	52.2%	72.7%	N/A
Aug-00	1,753	20.1%	45.2%	71.2%	82.4%	N/A	1,968	17.6%	36.1%	56.4%	68.3%	N/A
Sep-00	1,315	22.1%	49.7%	64.0%	N/A	N/A	1,593	18.0%	34.7%	44.3%	N/A	N/A
Oct-00	1,251	24.5%	36.9%	N/A	N/A	N/A	1,785	19.1%	25.4%	N/A	N/A	N/A
Nov-00	1,080	14.1%	N/A	N/A	N/A	N/A	1,527	12.8%	N/A	N/A	N/A	N/A
<b>Total</b>	<b>21,498</b>	<b>16.0%</b>	<b>38.3%</b>	<b>58.9%</b>	<b>73.4%</b>	<b>84.4%</b>	<b>18,416</b>	<b>12.2%</b>	<b>27.0%</b>	<b>42.9%</b>	<b>56.1%</b>	<b>68.5%</b>

File/ Cohort Month	Title XVI DCM Claims						Title XVI Control Claims					
	Claims Rec'd	Processing Time Percentage Cleared Within "x" Days					Claims Rec'd	Processing Time Percentage Cleared Within "x" Days				
		30	60	90	120	180		30	60	90	120	180
Nov-99	536	6.0%	23.1%	53.0%	72.9%	91.8%	486	4.1%	11.1%	34.4%	56.8%	85.8%
Dec-99	850	4.6%	24.9%	56.8%	76.5%	93.5%	726	5.5%	20.4%	44.2%	64.5%	85.7%
Jan-00	1,116	10.1%	34.5%	58.2%	79.1%	94.0%	982	9.3%	27.8%	50.5%	66.9%	85.3%
Feb-00	1,446	17.1%	36.8%	58.1%	75.7%	92.4%	1,252	18.3%	34.1%	53.6%	67.0%	86.0%
Mar-00	1,628	20.1%	42.1%	64.6%	79.1%	94.3%	1,421	19.2%	35.3%	52.4%	67.4%	87.0%
Apr-00	1,406	20.1%	41.0%	59.7%	76.0%	93.6%	1,378	18.1%	31.2%	48.2%	64.4%	85.4%
May-00	1,538	20.5%	37.6%	60.3%	79.6%	94.0%	1,625	17.7%	30.2%	47.9%	64.3%	86.0%
Jun-00	1,541	21.8%	41.1%	63.7%	80.2%	92.5%	1,652	19.4%	32.7%	49.2%	68.1%	84.1%
Jul-00	1,219	22.8%	41.6%	63.1%	79.2%	N/A	1,608	22.5%	35.0%	51.9%	70.1%	N/A
Aug-00	1,308	24.3%	44.9%	65.1%	72.5%	N/A	1,819	20.3%	34.4%	52.2%	61.1%	N/A
Sep-00	1,003	23.3%	42.6%	53.7%	N/A	N/A	1,500	23.4%	34.5%	41.7%	N/A	N/A
Oct-00	947	24.6%	32.6%	N/A	N/A	N/A	1,477	20.6%	25.4%	N/A	N/A	N/A
Nov-00	430	30.9%	N/A	N/A	N/A	N/A	740	23.8%	N/A	N/A	N/A	N/A
<b>Total</b>	<b>14,968</b>	<b>19.3%</b>	<b>38.0%</b>	<b>57.9%</b>	<b>71.9%</b>	<b>83.0%</b>	<b>16,666</b>	<b>18.5%</b>	<b>30.8%</b>	<b>45.8%</b>	<b>58.1%</b>	<b>70.1%</b>

<sup>6</sup> The DCM group had 2,805 Title II & 2136 Title XVI claims pending at the close of the data collection period. The control group had 4944 Title II & 4293 Title XVI claims pending at the close of the data collection period.

### 3. Allowance Rates

**Evaluation Questions:** *What affect will the DCM model have on initial allowances? Appeals? Reversals? Will final allowance rates be substantially higher than under the current process? Will re-filings be reduced?*

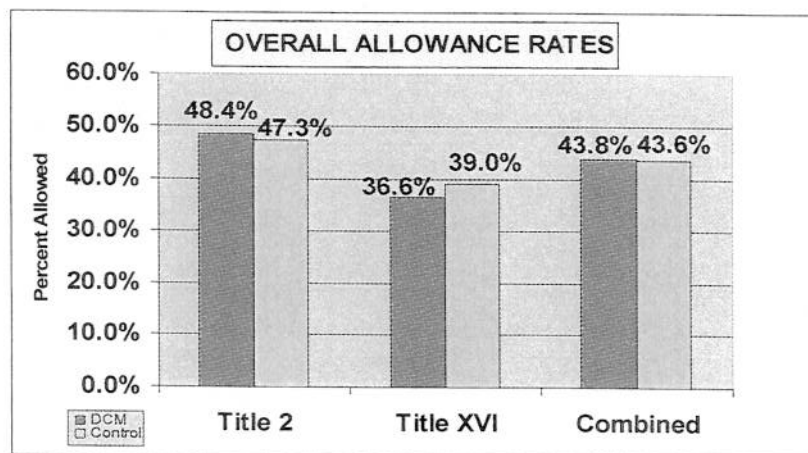
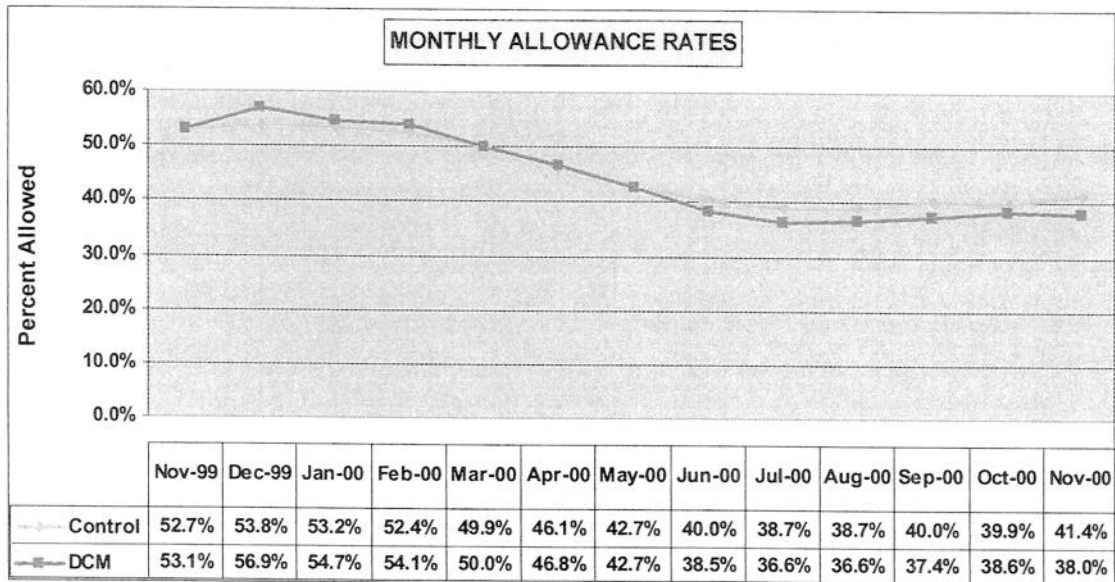
**Summary Results:**

- Initial-level: The allowance rate for the DCM group (43.8%) was statistically comparable to the control group (43.6%).
- Reconsideration level: Claimants denied at the initial level in the DCM group requested reconsideration on their claims 2.2 percent less often than claimants in the control group, which is statistically significant. DCM claimants were allowed 1.7 percent more often as compared to the control group, which is also statistically significant.
- Cumulative allowance rates (initial claim through the reconsideration level only): The cumulative allowance rates through reconsideration were comparable.
- Hearing level: Claimants denied at reconsideration in the DCM group requested a hearing 9.1 percent more often than claimants in the control group. The DCM allowance rate was 3.3 higher. Given the volume of clearances and the high sampling variability hearing data has not yet stabilized, and no conclusions were drawn.
- Re-filers: Re-filing volumes for DCM and control groups were too low to make an accurate comparison.



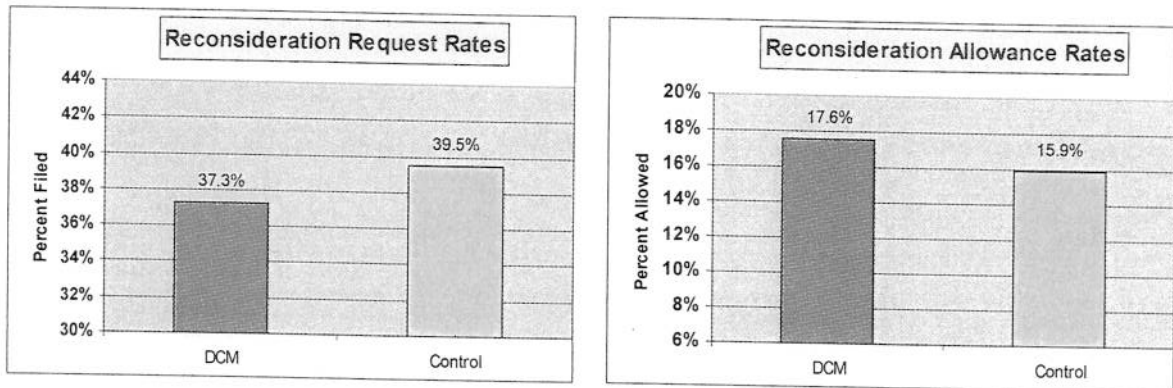
**Results:**

- a. **Initial Allowances:** The following charts show the decisional outcomes of test claims processed through the initial level. These include decisions reached through May 2001. Monthly allowance rates are determined based on claims application dates.



- The DCM group had a higher allowance rate for claims filed in the first six months and the control had a higher allowance rate for claims filed in the last six months of the test. It is possible that this was due in part to the widening gap in the percentage of monthly clearances between the two groups. This gap occurred as the volume of control cases was increased (for test purposes) and the rate of DCM receipts declined starting in June. It may be more appropriate to examine allowance rates on a month-to-month basis, where the percentage of claims cleared for an individual month was more comparable.

- The DCM overall initial allowance rate was statistically comparable to the control group over the life of the test<sup>8</sup> (.2% calculated difference).
  - The above breakout of allowance rates shows the DCM allowance rate for Title II was about 1.1% higher than the control, however the control allowance rate for Title XVI was about 2.4% higher.
- b. **Reconsideration data:** The following graphs depict data through mid August 2001, and show the percent of reconsideration requests and decisional outcomes.



- The DCM reconsideration request rate was significantly lower than the control group reconsideration rate. The DCM model yielded a reconsideration request rate of 37.3% (based on a volume of 6,046 reconsideration requests filed on 16,211 initial denials). The controls had 6,838 reconsideration requests from 17,308 initial denials, for a rate of 39.5%<sup>9</sup>.
- The reconsideration allowance rates for the DCM group of claims (17.6%) was significantly higher than the control group of claims (15.9%)<sup>10</sup>.
- The cumulative allowance rates, though the reconsideration level only, were comparable. The rate for the DCM group was 46.9 percent and for the control group 46.6 percent.<sup>11</sup>

<sup>8</sup> The SV for the difference between the initial claim allowance rates was .80%, based upon a DCM sample size of 29,452 decisions and 12,904 allowances and a control group sample size of 30,041 decisions and 13,110 allowances.

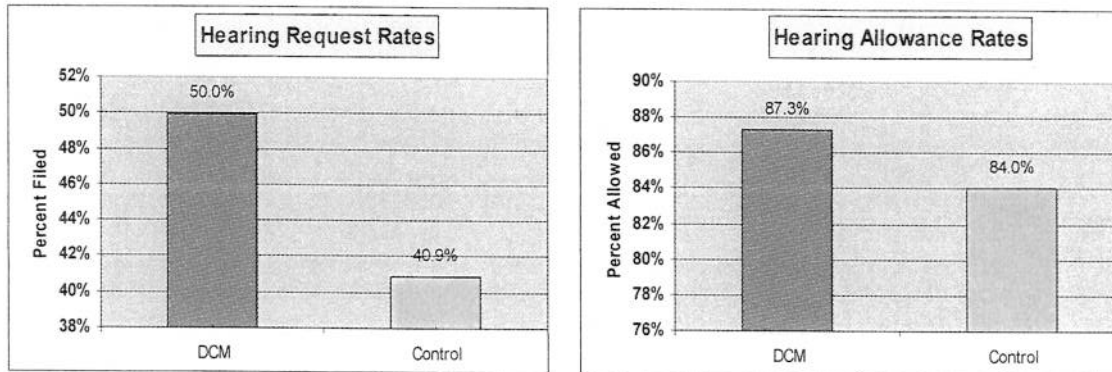
<sup>9</sup> The reconsideration filing-rate S.V. is 1.04%.

<sup>10</sup> Reconsideration allowance rates are based upon a DCM claims sample size of 5,129 and 901 allowances and a control group claims sample size of 5,610 decisions and 893 allowances. The SV for the difference between the reconsideration allowance rates is 1.41%.

<sup>11</sup> Cumulative allowance rates were calculated by totaling initial and reconsideration allowance decisions divided by all initial decisions, excluding no decisions and technical denials. The SV for the difference between the rates is .80%.



- c. **Hearing data:** The following graphs depict data through mid August 2001, and show the percent of hearing requests and decisional outcomes:



- The DCM hearing request rate was 9.1% higher than the control group. The DCM group had a hearing request rate of 50% (based on a volume of 2,112 hearing requests filed on 4,228 reconsideration denials). The controls had 1,930 hearing requests from 4,717 reconsideration denials, for a rate of 40.9%. The SV for the difference in hearing request rates is 2.07%.
  - The hearing allowance rate for the DCM group was 87.3% compared to 84% for the control group. The SV is 6.18% based on a volume of 248 allowances out of 284 hearings held for the DCM group, and for the 179 allowances out of 213 hearings held for the control group.
  - Hearing data has not yet stabilized and no conclusions were drawn.
- d. **Re-filings:** Due to the short duration of the test period, data on re-filing is limited. Refilings have been identified for 31 DCM cases and 25 control cases. The volumes are insufficient to draw conclusions.

#### 4. Productivity and Cost Efficiency

**Evaluation Question:** *Can DCM productivity achieve parity with current process productivity?*

**Summary Results:** The DCM process is a blend of FO and DDS functions. The Agency has no single mechanism to accurately measure productivity of the DCM process. For the DCM test, current DDS and FO based formulas were modified to provide a means to compare DCM productivity to the current process.

A series of productivity assessments were conducted using DCM-related staffing models and apportioned overhead support along with work clearances produced by the DCMs and CSSs. Results from these comparisons showed DCM productivity ranged from about 14 percent less to 8 percent more than the current process.

**Evaluation Questions:** *What effect does the DCM have on disability claims processing cost? Does the DCM impact the cost of obtaining Medical Evidence of Record (MER) and Consultative Examinations (CEs)? What effect does the DCM have on appellate processing costs?*

**Summary Results:** The productivity assessment was a key factor in determining DCM cost per claim processed. Additionally, the cost determination was effected by estimated salary increases; DCM support (CSS, DDS medical support, supervisory ratios, etc.); medical case costs (MER and CE); and associated overhead costs. Dependent on the productivity and staffing models used, the DCM administrative cost to process an initial claim ranged from about 7 to 21 percent higher than the current process.

There was an insufficient volume of cases through the appeals process to determine the impact and related administrative costs of the DCM process beyond the initial level.

Note: Costs reflected in this section do not factor in costs associated with creating an infrastructure to support the DCM process, training and mentoring, etc.

#### Productivity and Cost Background:

This section provides evaluation results for productivity and costs. These two areas were the most difficult to assess because of the differences in how FO and DDS productivity and costs are calculated in the current process.

The current process for handling disability claims consists of two distinct parts—a FO process and a DDS process. Each of these processes has its own unique productivity



measurement system: Work Units Per Work Year (WUPWY) in FOs and Production Per Work Year (PPWY) in DDSs.

The DCM model merged both the FO and DDS processes; however, the Agency does not have a single productivity benchmark that can reflect the combination of these two processes. With some assistance from the Lewin Group, DPRT staff revised the current FO/DDS productivity formulas to allow for a comparison of the DCM to the current, national process -- not the control group. *(Refer to the "Technical Notes" section in Appendix IV for additional detail regarding productivity calculations using the modified DDS (PPWY) and FO (WUPWY) systems.)*

### **Methodology:**

Adjustments were needed in the production and cost calculation methodologies to be able to adequately capture the full scope of the DCM process. SSA's Cost Analysis System (CAS)<sup>12</sup> was used as the primary data source in determining both productivity and cost.

The DDS productivity measure includes an adjustment to recognize programmatic (non-medical) aspects of the case cost. Likewise, the FO based formula was adjusted to include task times for making disability determinations.

The DDS system served as the general model for estimating the cost-per-claim in the DCM process. Adjustments were made to account for the apportioned costs of regional and DDS staff support to the DCM. All workloads processed by DCM staff were used in the cost calculation along with: DCM-related staff time, salary, support provided by other SSA and DDS components, costs of obtaining MER and CEs; and productivity levels.

### Added Complexities

The focus of Phase 1 was to complete training and move through the learning curve in preparation for the Phase 2 formal evaluation. All DCMs were expected to be at a journeyman level at the start of Phase 2, having had more than a year's experience in the process. Phase 2 was designed to evaluate fully trained, experienced DCMs. Two factors added to the complexity of the evaluation:

- Thirteen federal DCM back-fills were selected during Phase 1. Although these back-fills completed training during the first phase, they entered Phase 2 with varying levels of process experience. During the operation of Phase 2, experience of these backfills was considered when assigning leads to the DCM sites. In the evaluation, DPRT conducted analysis using the staff model utilized during the Phase 2 test operation as well as a second staff model better replicating how staff is considered in the current process. A determination was made that for

<sup>12</sup> The CAS is an automated management information system that provides a wide range of information on workloads, costs, WY expenditures and production rates of SSA and its principal component organizations. The CAS, SC3-SUM report expresses production rates in a production per work year (PPWY) format. Cost is expressed in a cost-per-claim-processed basis.

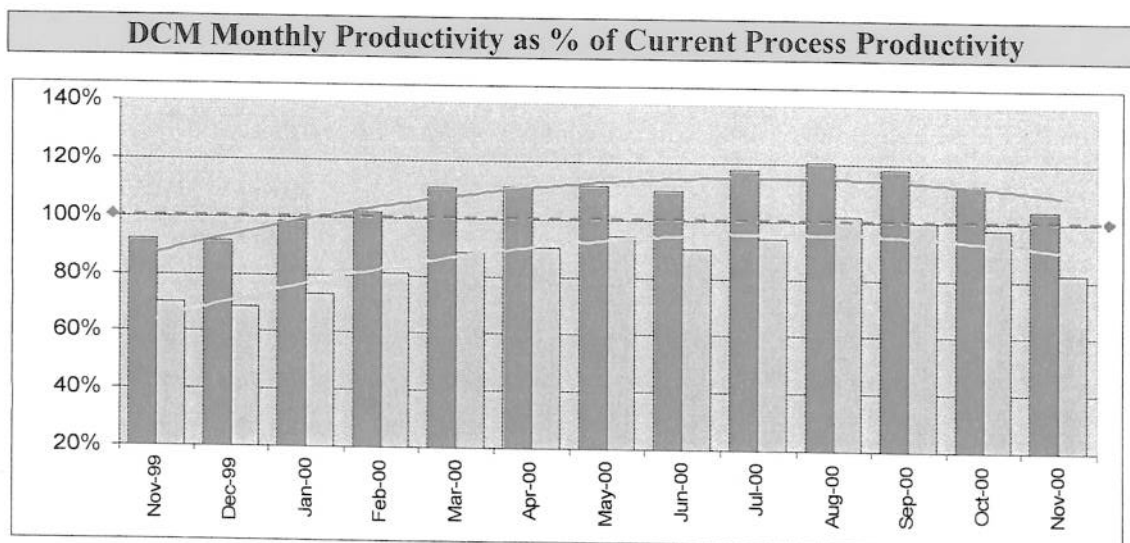
evaluation purposes, the most appropriate model would be the one that most closely resembles the treatment of staff in the current process (called the Evaluation Model).

- Staff time and work clearances done by CSSs during the test also added complexity to the assessment of DCM productivity and cost since their contribution could not be separately determined.

Note: A more complete discussion and comparison of these staffing models (Phase 2 Operation Model and the Evaluation Model) is contained in Appendix IV.

### Productivity

The following chart shows DCM productivity based on the modified DDS and FO calculations displayed in monthly trendlines. The national level of productivity, at 100%, is identified for comparison purposes.



- = Productivity calculation using the modified DDS-based method, with trendline
- = Productivity calculation using the modified FO-based system, with trendline

- The above trend lines show productivity over the life of the test.
- Using the DDS-based calculation, productivity averaged about 108%; using the FO based formula, productivity averaged about 86%.
- Complexities associated with both productivity calculations do not allow a more precise estimate. Sensitivity analysis conducted on both the modified DDS and FO calculations did show that changes in assumptions had a greater impact in the FO formula.



The following points relate to these productivity calculations:

1. The modified FO calculation used FY 99 SAOR data to determine appropriate work credits to be assigned for medical decisions. Medical determinations comprised 53% of the work-unit credits in this calculation. Additionally, adjustments were made for prototype cases to account for the additional work associated with the rationale and claimant conference requirements.
2. Both calculation models contain a 64.4 minute adjustment to account for DDS support (i.e., medical consultant, CE, and quality assurance reviews) provided to the disability determination portion of the process.
3. The modified FO system used Agency DOWR/DOWS work-credits to determine field office work cleared by DCMs and CSSs during the test. These credits were counted in the same manner as the current field structure.
4. Over 98% of the DCM process' credited work involved initial disability claims. The remaining 2% was attributable to non-claims actions cleared by either the DCM or CSS.

Below are factors that contributed, in part, to productivity levels during Phase 2:

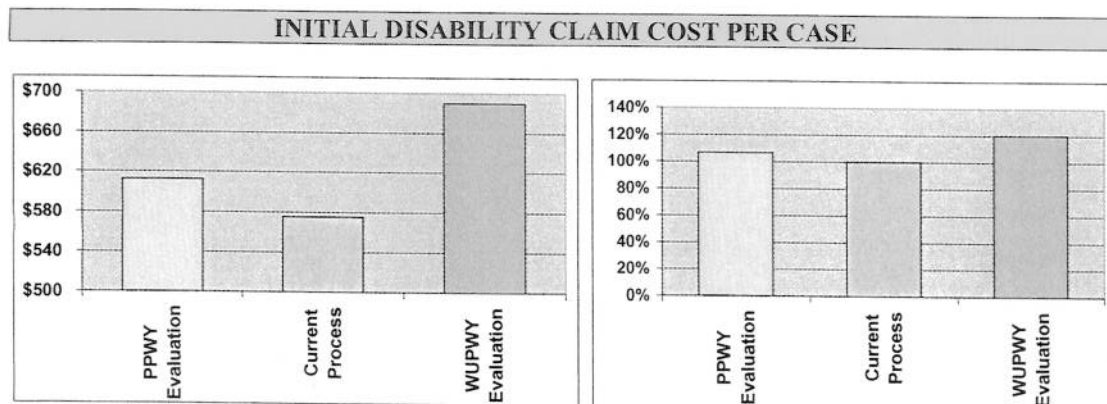
- DPRT, RICs, and DCM sites placed additional emphasis on claims intake in January and February 2000. *Refer to "Key Issue: Processing Time" for additional data on average DCM intake.*
- For the first 4 months of the test, the pipeline of workloads built reaching an average pending level of 50 cases per DCM by the end of February. Pending levels continued to build through June 2000. Starting July through the end of the test the average pending levels per DCM decreased. *(Refer to "Key Issue: Processing Time" for additional data on average DCM pending.)*
- Staffing during the first 9 months of the test was stable. Staffing losses increased significantly toward the end of the test period (DCM sites lost about 14% of staff from September through November 2000). See *"Cost and Productivity Technical Notes"* for additional data on DCM staffing.

## Cost

Cost calculations considered a combination of:

- Salary costs: Salary costs were factored into the overall cost calculation. Expected salary increases for state/federal DCMs and CSSs were averaged into the overall calculation;
- Support provided by the DDSs, regional offices and from other SSA components: The national per-claim personnel and other costs were determined by dividing national costs by the number of claims processed. This factor was then applied to the volume of processed DCM claims. DDS and regional personnel costs were factored in the same way.
- MER and CE: Test states with available data reported MER and CE costs to DPRT. DPRT matched this data with DCM and control cases processed and compiled the database. Costs were determined for MER and CE and then combined for total medical costs per case processed. The average medical cost per medical decision (total decisions) for the DCM was \$88.47 as compared to \$77.55 for control cases (a 14% difference).

The following charts show cost per DCM claim versus the current process; and cost per DCM claim expressed as a percent of the current process. The current cost per claim is compared to the DCM cost per claim, calculated in each of the two productivity methods.



The higher DCM cost per claim versus the current process was a factor of the expected salary increases associated with the DCM, and added MER and CE costs. In addition, costs were affected by the different measures used to calculate DCM productivity.

- The modified DDS method for computing productivity yielded a DCM cost per claim about 7% higher than the current process.
- Applying the modified FO productivity method yielded a DCM per claim cost about 21% greater than the current process.



The following assumptions were applied to DCM productivity and cost determinations:

- Due to the manner in which CSS staff was assigned to the test, and the varied use of this staff, there was no valid way to separate CSS support from the DCM test. CSS support was estimated based on a 2:1 DCM to CSS staffing ratio. If the ratio of CSS staff was less than 2:1, the actual ratio was used. If the CSS ratio was greater than 2:1, CSS support defaulted to a 2:1 ratio as CSS time above this ratio was not spent on DCM support activities. Actual CSS hours devoted to the test could not be more precisely determined.
- The DCM supervisory staff ratio was determined by compiling data from weekly DCM site reports. The DCM supervisory ratio was computed at approximately 1:10. The current FO structure supervisory ratio is about 1:13. Supervisor (Site Coordinator) time devoted to the DCM was estimated based on site reports.
- Certain DDS-specific support time was charged to the DCM based upon 3/99 CEMS and OWA baseline study data. This time (64.4 minutes per medical decision) was based on the most recent data available.
- DCM salary increases were estimated using expected federal employee salary increases. Due to the varying legal and personnel issues involved with state salaries, the same percent salary increase was assumed for state DCMs.
- Most other component staff support, salary costs, and other costs were assigned to the DCM on a per claim basis in the same proportion as the current process.

#### Appellate Costs

There was an insufficient volume of claims processed through appeal to draw conclusions regarding cost beyond the initial level.

## 5. Customer Service Satisfaction

**Evaluation Question:** *To what extent does the DCM model improve claimant satisfaction?*

**Summary Results:** Claimants who were awarded disability benefits rated both processes excellent overall, but denied claimants rated the DCM process significantly higher than claimants denied in the current process. (The current process was not represented by the control group, but represented by the Fiscal Year 2000 Market Measurement Program Survey of Initial Disability applicants.)

Additionally, the survey results indicate the DCM process was rated higher in many areas of claimant satisfaction as compared to the current process for both awarded and denied claimants. This was particularly evident in ratings of employee attributes such as helpfulness, courtesy, job knowledge and time spent with the claimant. Denied respondents, traditionally much less satisfied with all aspects of service gave surprisingly high attribute ratings, with job knowledge as the top-rated aspect of service. Claimants who were denied benefits reported that the DCM explained the process very well, processed their claims timely and conveyed a clear understanding of the decision.

### Methodology:

Phase 2 DCM customer service was measured by the Office of Quality Assurance (OQA). Staff in the Regional Offices of Quality Assurance and Performance Assessment conducted a DCM customer survey by telephone during August and September 2000. In addition to detailing the findings of the DCM customer survey, the OQA report included comparisons with customer satisfaction in the current disability process, as measured by the fiscal year 2000 Market Measurement Program (MMP) customer segment survey of initial disability applicants. The MMP survey excluded all claims processed under disability redesign, whether in the DCM process or prototype. The results were recalculated to exclude SSI children's disability cases and technical denials to allow a true comparison to the DCM process.

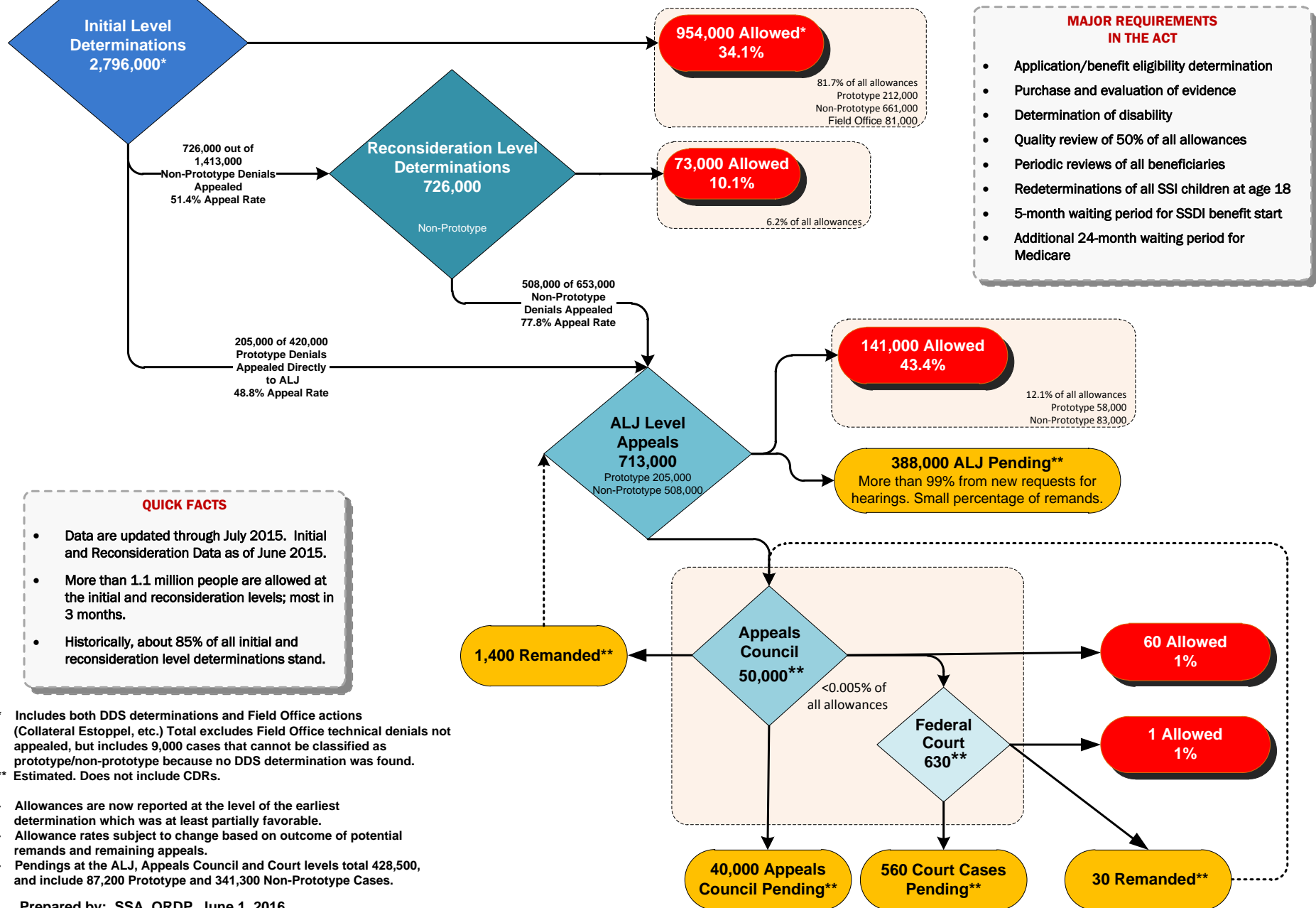
### Results:

OQA noted in their report that:

- As expected, decisional outcomes have a significant impact on survey result outcomes. This is evident in the large gap between the respondents' level of satisfaction in the awarded and denied categories.
- The DCM model promoted the use of the telephone to take applications, and as a result a much larger proportion of DCM claims were filed by telephone (75%) than the current process (less than 50%).

# 2013 Longitudinal Disability Claims and Appeals Data

Based on claims filed in Calendar Year 2013



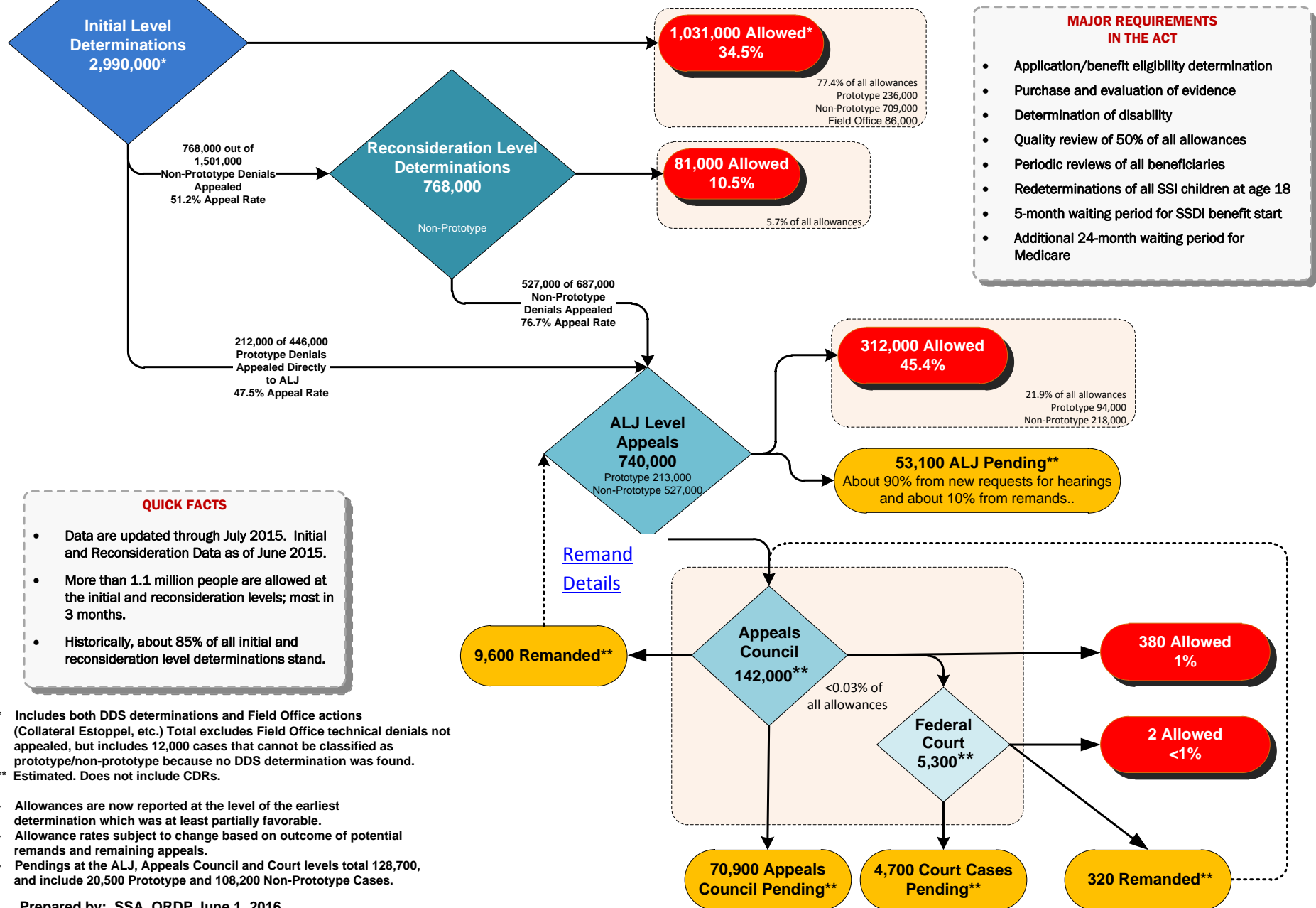
\* Includes both DDS determinations and Field Office actions (Collateral Estoppel, etc.) Total excludes Field Office technical denials not appealed, but includes 9,000 cases that cannot be classified as prototype/non-prototype because no DDS determination was found.  
\*\* Estimated. Does not include CDRs.

- Allowances are now reported at the level of the earliest determination which was at least partially favorable.
- Allowance rates subject to change based on outcome of potential remands and remaining appeals.
- Pendings at the ALJ, Appeals Council and Court levels total 428,500, and include 87,200 Prototype and 341,300 Non-Prototype Cases.

Prepared by: SSA, ORDP June 1, 2016  
Source: Longitudinal Disability Research File

# 2012 Longitudinal Disability Claims and Appeals Data

Based on claims filed in Calendar Year 2012

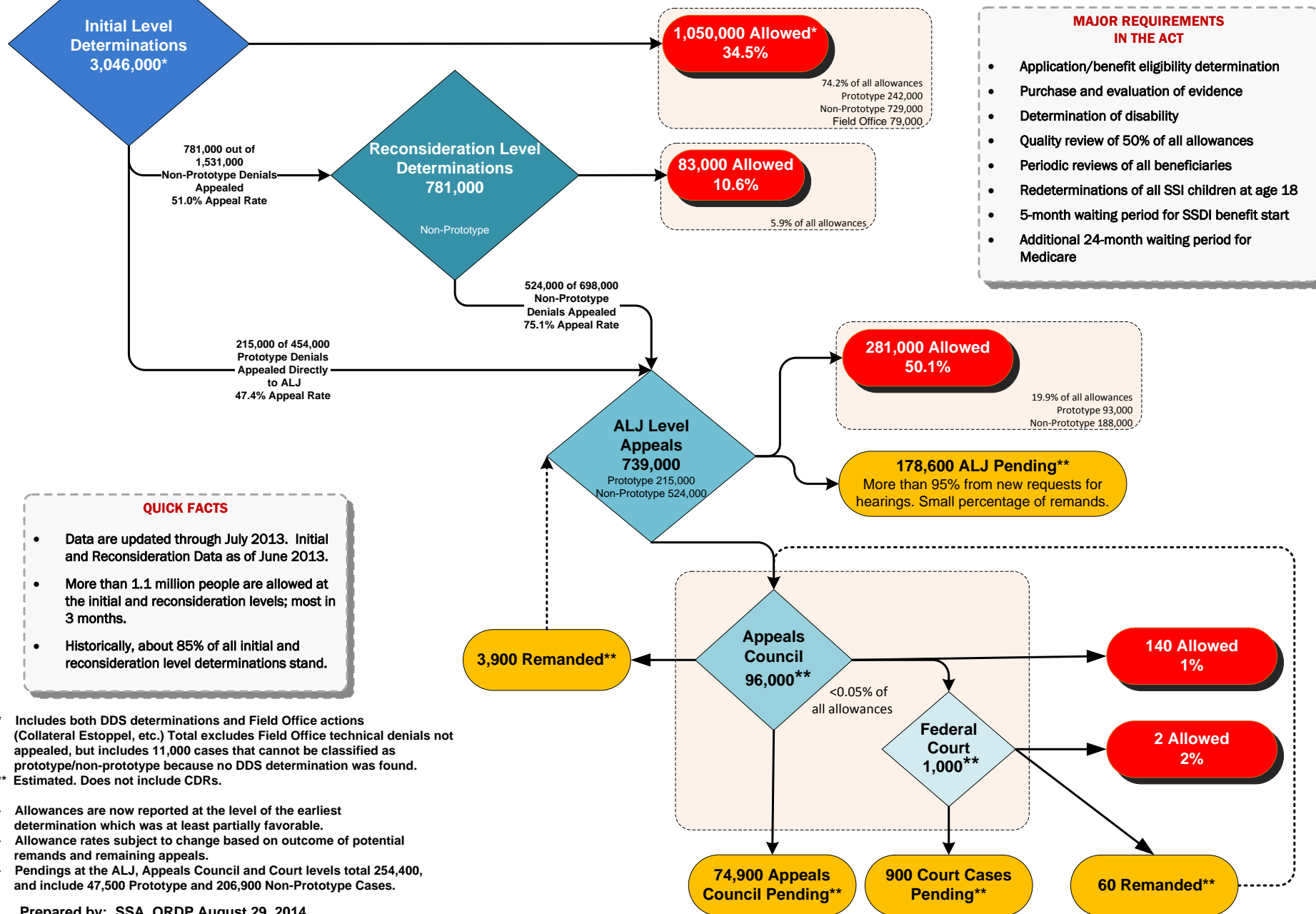


Prepared by: SSA, ORDP June 1, 2016  
Source: Longitudinal Disability Research File



# 2011 Longitudinal Disability Claims and Appeals Data

Based on claims filed in Calendar Year 2011



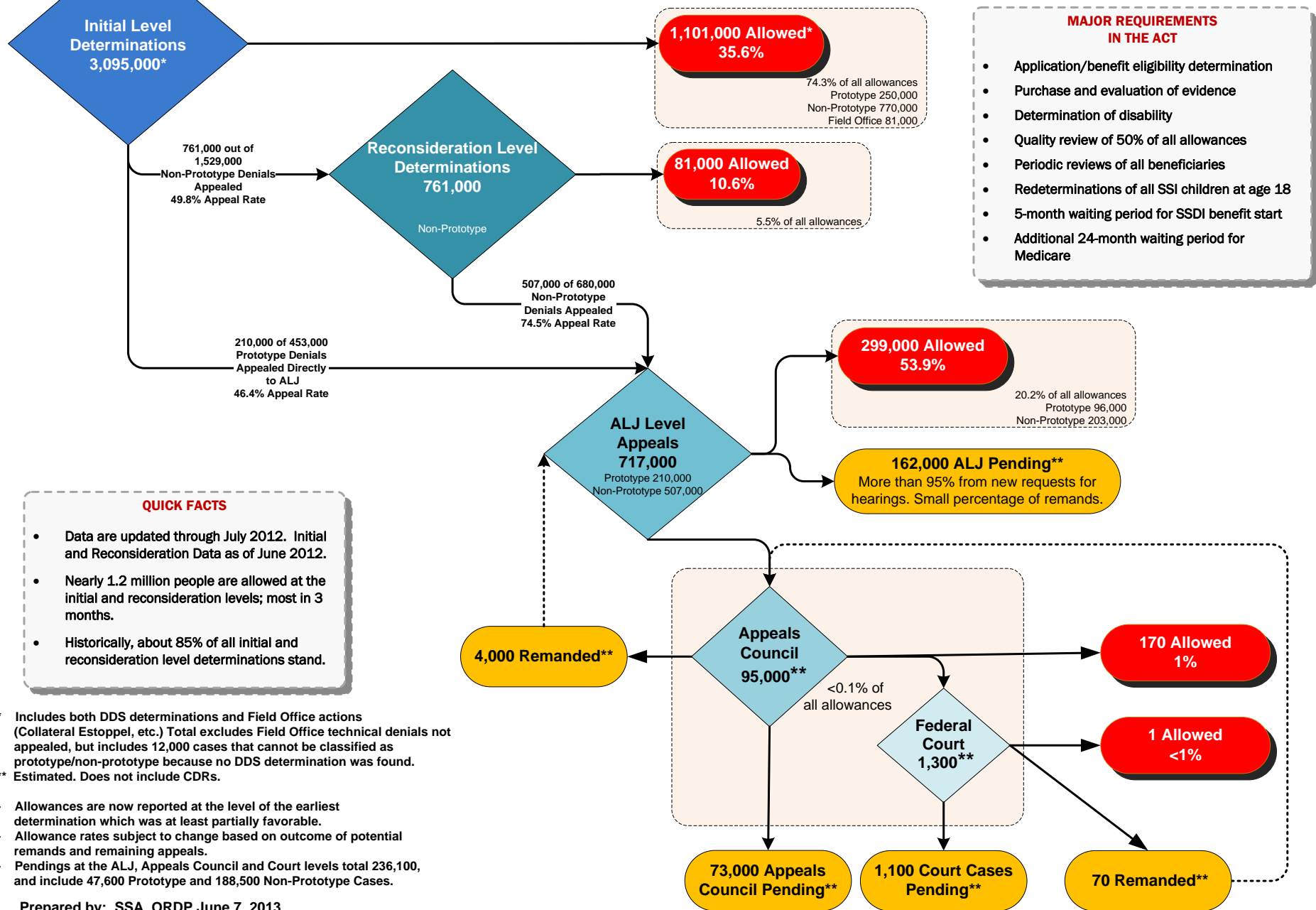
\* Includes both DDS determinations and Field Office actions (Collateral Estoppel, etc.) Total excludes Field Office technical denials not appealed, but includes 11,000 cases that cannot be classified as prototype/non-prototype because no DDS determination was found.  
\*\* Estimated. Does not include CDRs.

- Allowances are now reported at the level of the earliest determination which was at least partially favorable.  
- Allowance rates subject to change based on outcome of potential remands and remaining appeals.  
- Pending at the ALJ, Appeals Council and Court levels total 254,400, and include 47,500 Prototype and 206,900 Non-Prototype Cases.

Prepared by: SSA, ORDP August 29, 2014  
Source: Longitudinal Disability Research File

# 2010 Longitudinal Disability Claims and Appeals Data

Based on claims filed in Calendar Year 2010



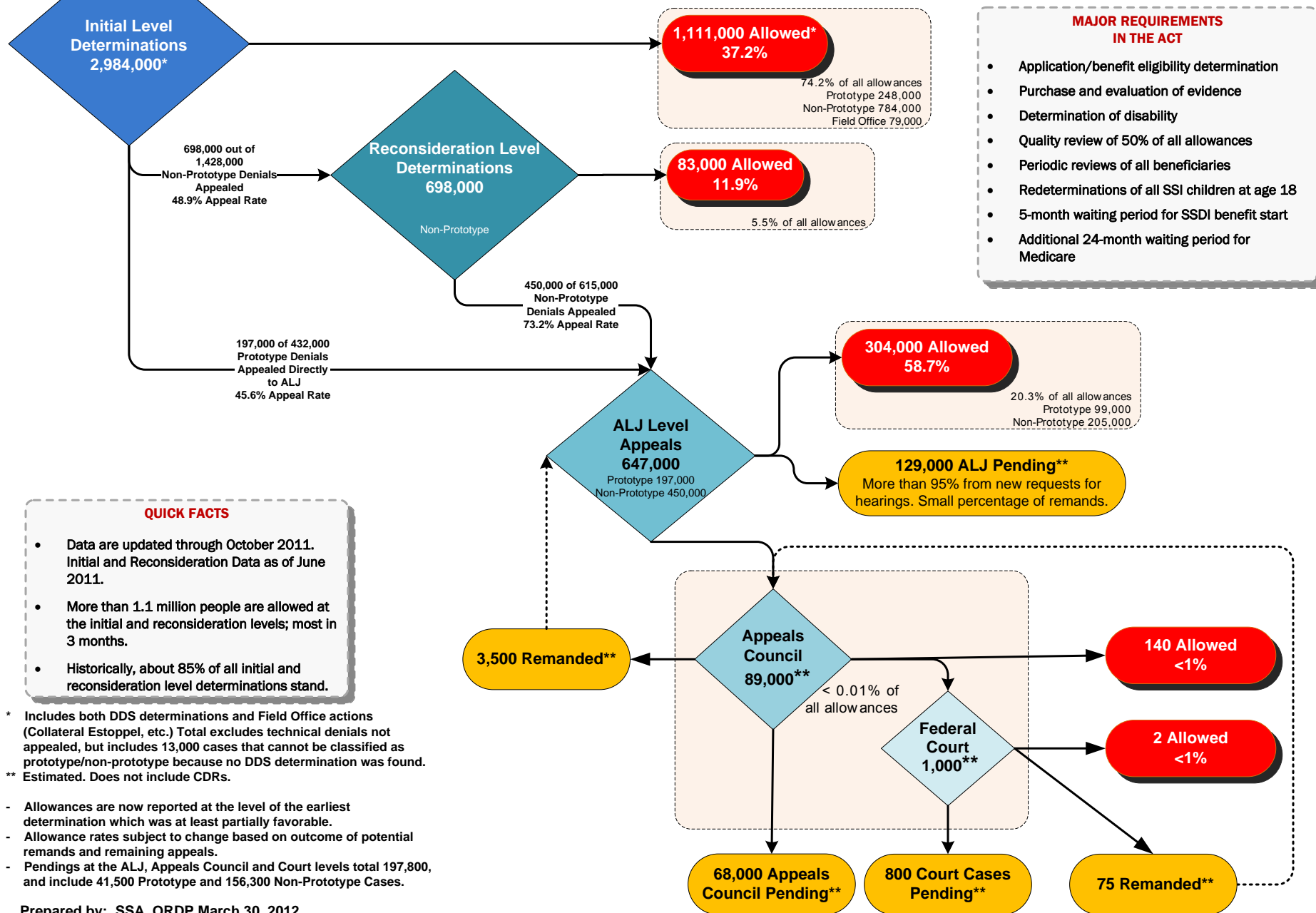
\* Includes both DDS determinations and Field Office actions (Collateral Estoppel, etc.) Total excludes Field Office technical denials not appealed, but includes 12,000 cases that cannot be classified as prototype/non-prototype because no DDS determination was found.  
\*\* Estimated. Does not include CDRs.

- Allowances are now reported at the level of the earliest determination which was at least partially favorable.  
- Allowance rates subject to change based on outcome of potential remands and remaining appeals.  
- Pending at the ALJ, Appeals Council and Court levels total 236,100, and include 47,600 Prototype and 188,500 Non-Prototype Cases.

Prepared by: SSA, ORDP June 7, 2013  
Source: Longitudinal Disability Research File

# 2009 Longitudinal Disability Claims and Appeals Data

Based on claims filed in Calendar Year 2009



\* Includes both DDS determinations and Field Office actions (Collateral Estoppel, etc.) Total excludes technical denials not appealed, but includes 13,000 cases that cannot be classified as prototype/non-prototype because no DDS determination was found.

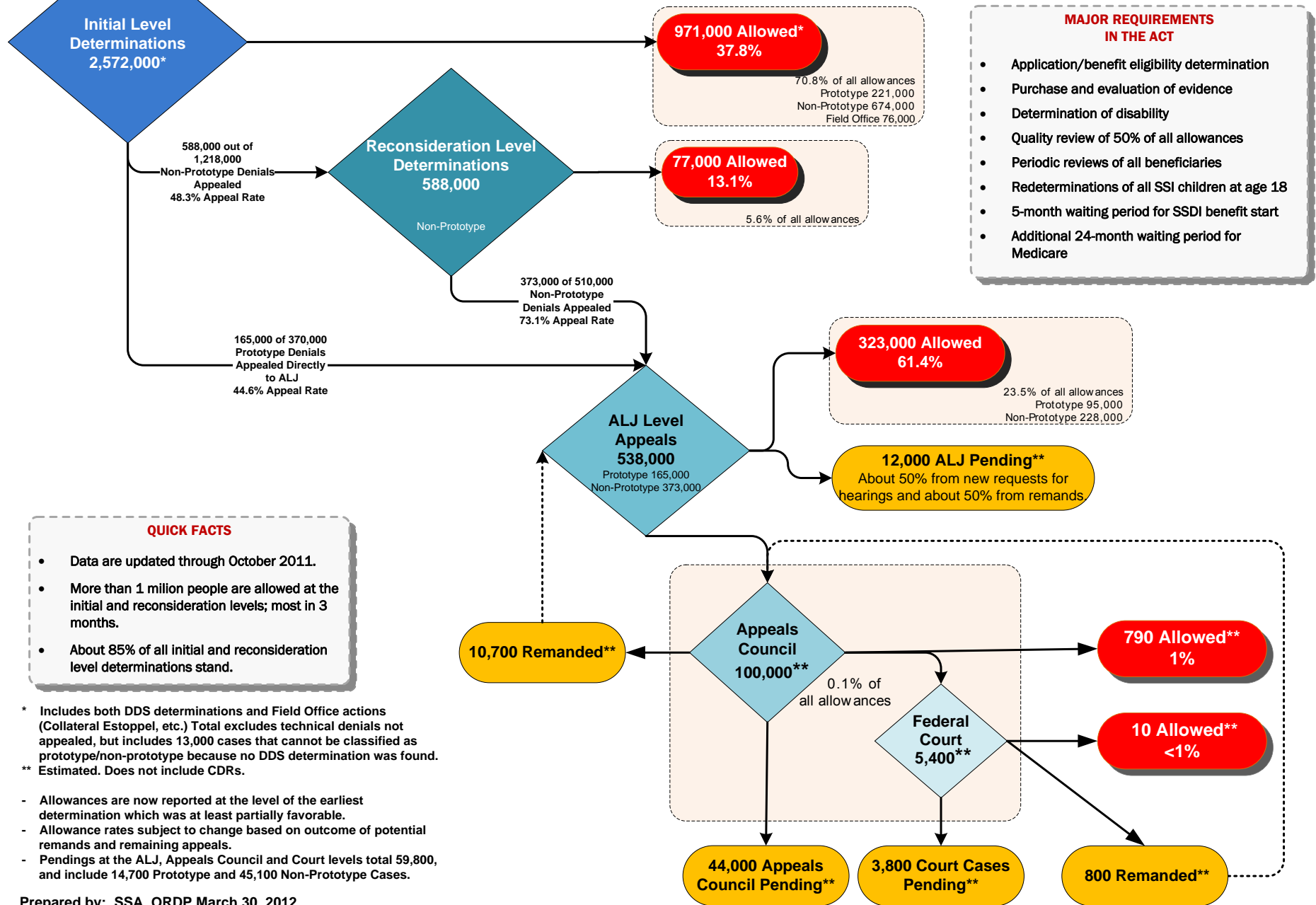
\*\* Estimated. Does not include CDRs.

- Allowances are now reported at the level of the earliest determination which was at least partially favorable.
- Allowance rates subject to change based on outcome of potential remands and remaining appeals.
- Pendings at the ALJ, Appeals Council and Court levels total 197,800, and include 41,500 Prototype and 156,300 Non-Prototype Cases.

Prepared by: SSA, ORDP March 30, 2012  
Source: Longitudinal Disability Research File

# 2008 Longitudinal Disability Claims and Appeals Data

Based on claims filed in Calendar Year 2008

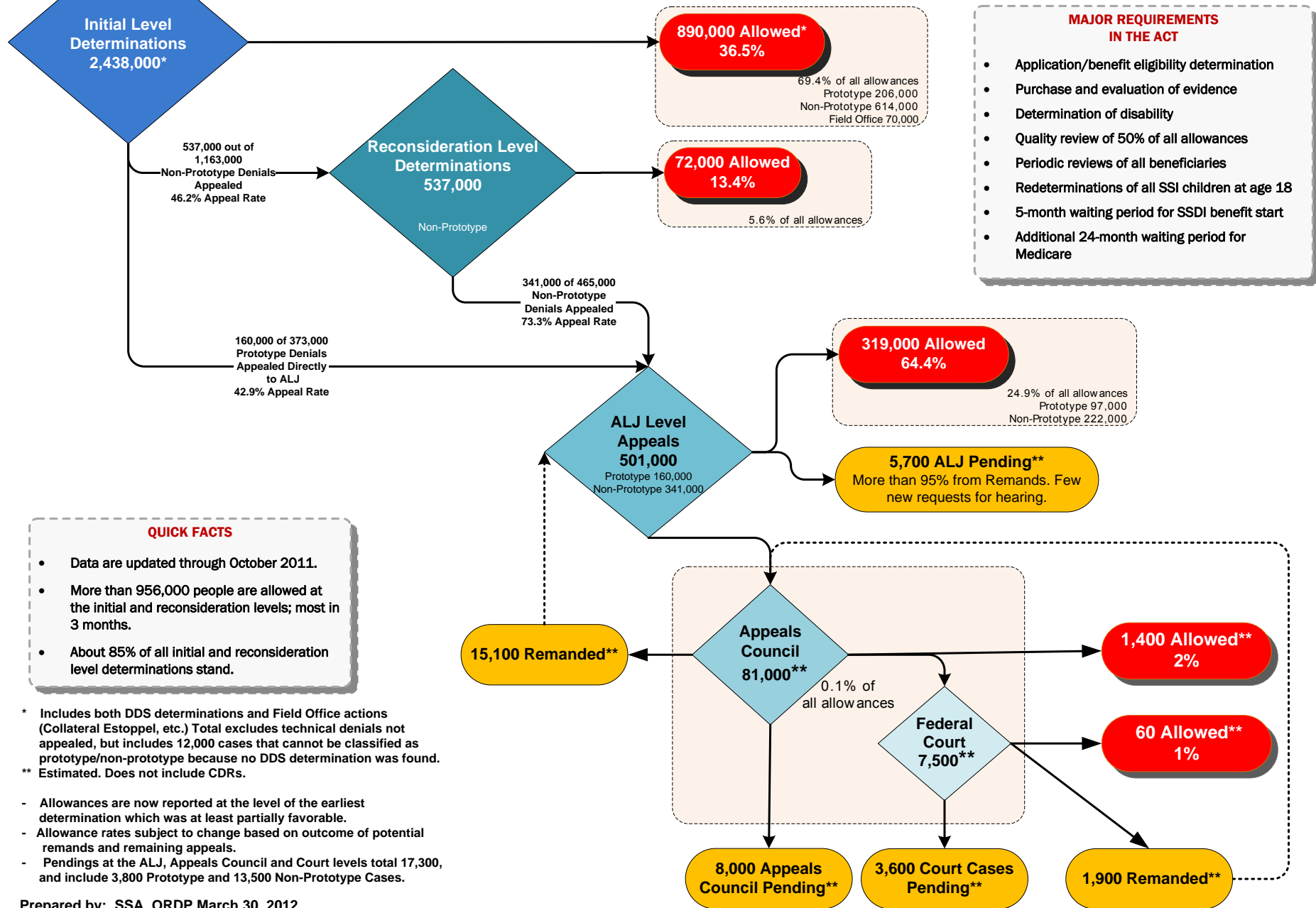


Prepared by: SSA, ORDP March 30, 2012  
Source: Longitudinal Disability Research File



# 2007 Longitudinal Disability Claims and Appeals Data

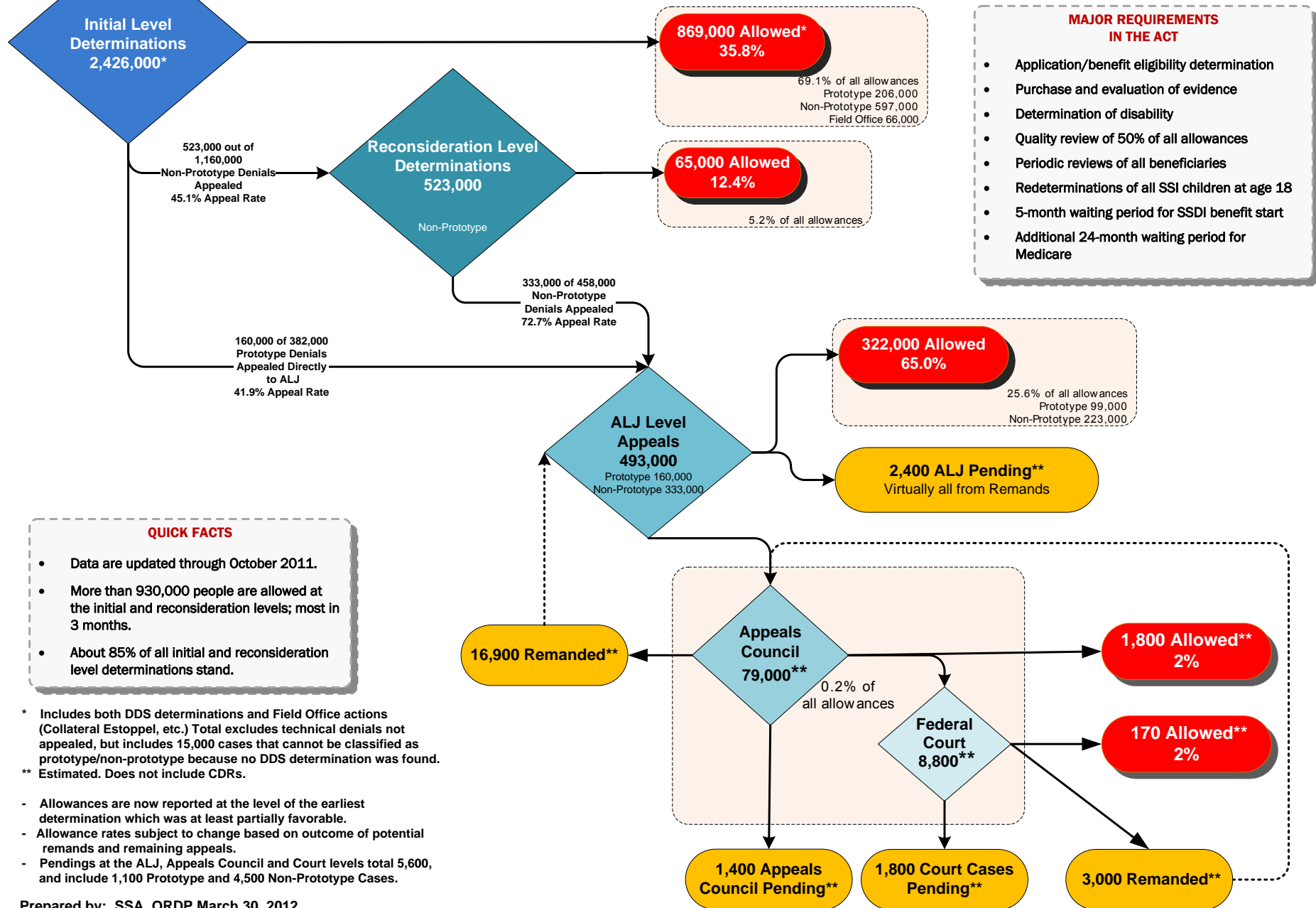
Based on claims filed in Calendar Year 2007



Prepared by: SSA, ORDP March 30, 2012  
Source: Longitudinal Disability Research File

# 2006 Longitudinal Disability Claims and Appeals Data

Based on claims filed in Calendar Year 2006



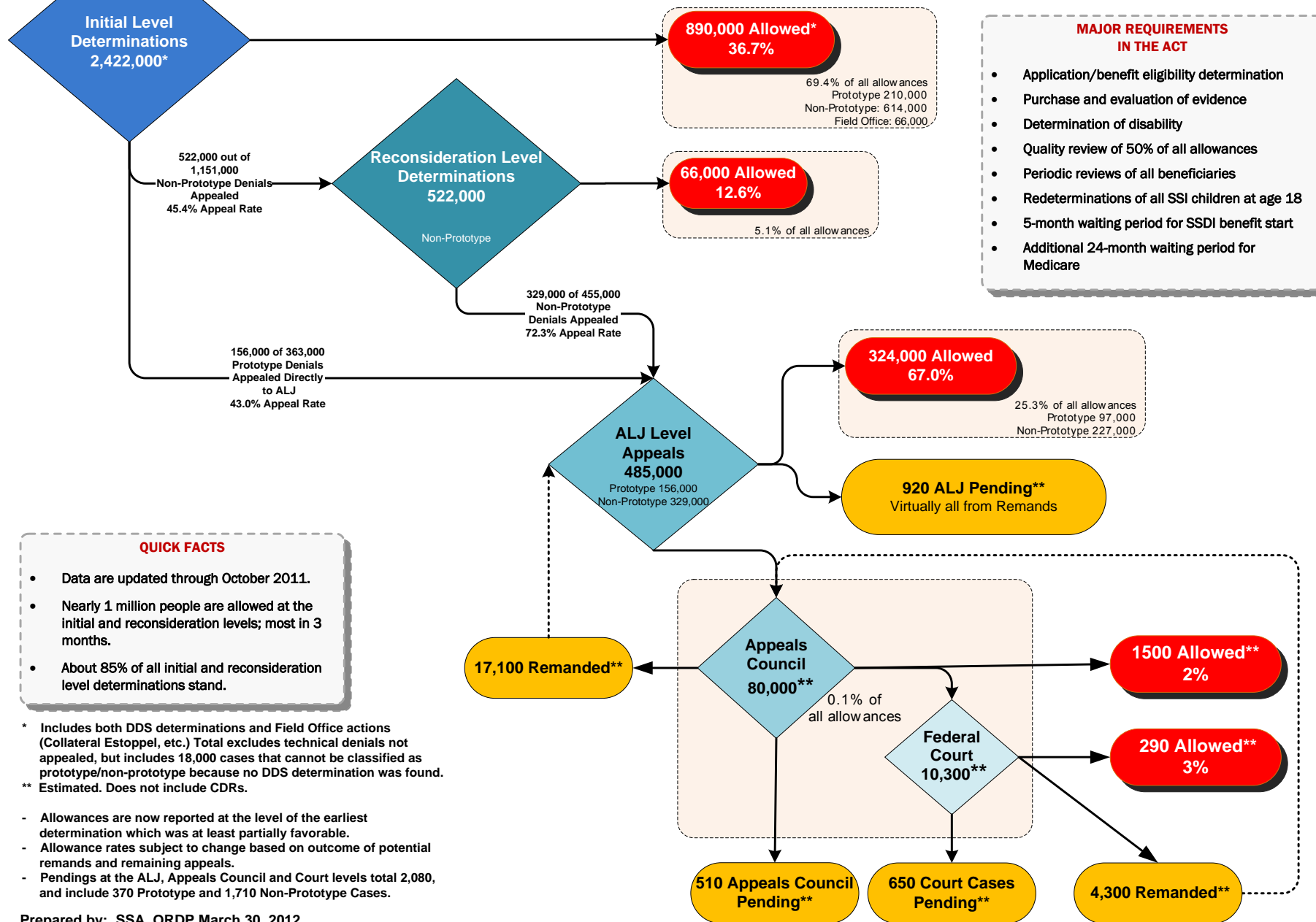
\* Includes both DDS determinations and Field Office actions (Collateral Estoppel, etc.) Total excludes technical denials not appealed, but includes 15,000 cases that cannot be classified as prototype/non-prototype because no DDS determination was found.  
\*\* Estimated. Does not include CDRs.

- Allowances are now reported at the level of the earliest determination which was at least partially favorable.
- Allowance rates subject to change based on outcome of potential remands and remaining appeals.
- Pending at the ALJ, Appeals Council and Court levels total 5,600, and include 1,100 Prototype and 4,500 Non-Prototype Cases.

Prepared by: SSA, ORDP March 30, 2012  
Source: Longitudinal Disability Research File

# 2005 Longitudinal Disability Claims and Appeals Data

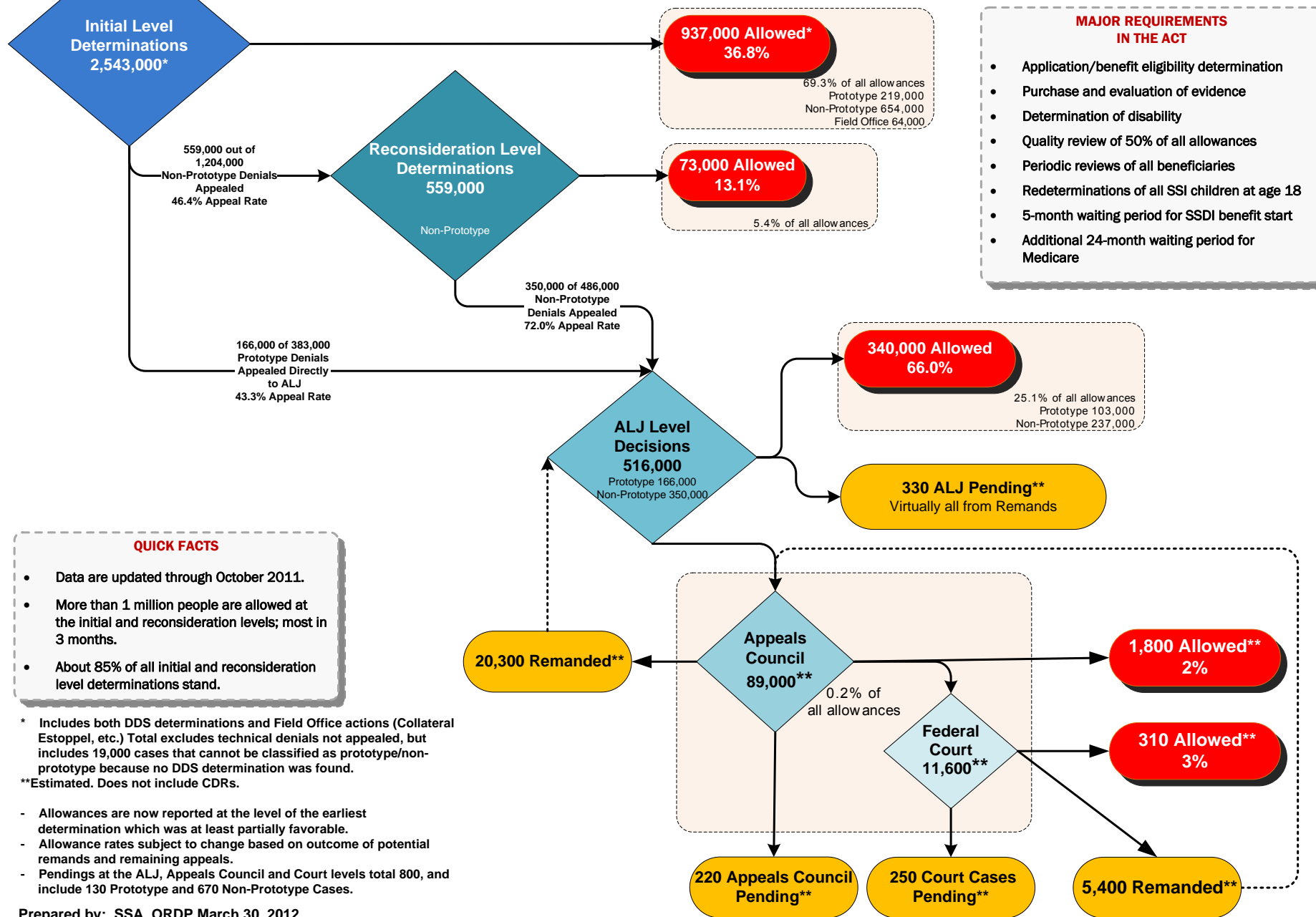
Based on claims filed in Calendar Year 2005



Prepared by: SSA, ORDP March 30, 2012  
Source: Longitudinal Disability Research File

# 2004 Longitudinal Disability Claims and Appeals Data

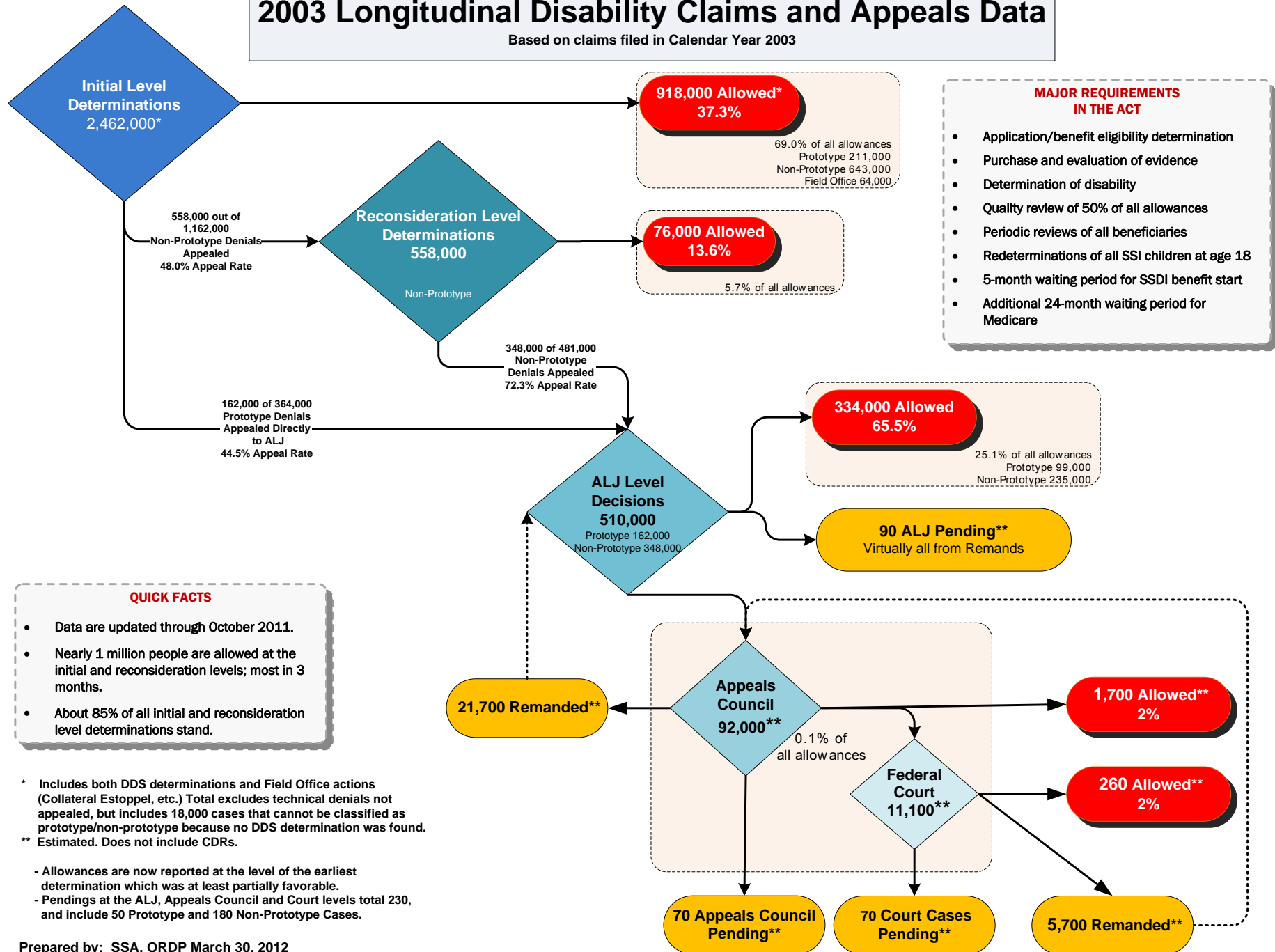
Based on claims filed in Calendar Year 2004



Prepared by: SSA, ORDP March 30, 2012  
Source: Longitudinal Disability Research File

# 2003 Longitudinal Disability Claims and Appeals Data

Based on claims filed in Calendar Year 2003



Prepared by: SSA, ORDP March 30, 2012  
Source: Longitudinal Disability Research File

**Disability Waterfall Chart by Cohort (2013) Q&A**  
**Office of Retirement and Disability Policy (ORDP)**  
**December 5, 2016**

**Question: Why are the number of remands only 30 for a federal court case workload of 630 cases, when ODAR said that the remand rate from the courts was about 50%?**

Answer: The waterfall chart is a snapshot taken in June 2016 of all claims filed during 2013. We wait for about three years to chart outcomes in order for the vast majority of claims to get fully through the process.

Of the 630 cases filed in Federal Court, 560 were still pending as of the date the chart was created. A small number were allowed and 30 had already been remanded.

Waterfall charts from prior cohort years show a similar pattern; once cases work through all appeals, the ultimate remand rate has consistently been about 50%.

This is consistent with figures provided by ODAR.

## **DESCRIPTION OF OPERATIONS EMPLOYEES BY POSITION TYPE**

### **REGIONAL OFFICE (RO) POSITIONS**

**Regional Commissioner (RC), SES:** The RC, as the principal Social Security Administration (SSA) official in a major geographic segment of the United States, provides executive-leadership and/or coordination for the Retirement, Survivors, Disability and Health Insurance (RSDHI), Black Lung Benefits and Supplemental Security Income (SSI) programs. The RC represents SSA and directs its relationships within HHS and with other Federal and non-Federal agencies and organizations. The RC serves as principal line official for program operations and as an advisor to other top officials on regional program and administrative matters. The RC serves as the principal SSA spokesperson for regional interests and concerns.

**Deputy Regional Commissioner, SES:** The deputy RC shares with the Regional Commissioner responsibility for all functions within the regional organization including planning, decision making and implementation of policies objectives and goals relating to present and future operations. Assumes responsibility for all component functions within the regional organization and acts on all matters within the Regional Commissioner's jurisdiction with full commitment authority.

**GS-15 Regional Communications Director:** The Regional Communication Director represents the views and concerns of the Administration in providing regional leadership, management direction, and expert advice in developing and administering a comprehensive Social Security Administration (SSA) national public information and external affairs program. Serves as principal advisor to the Regional Commissioner and Deputy Commissioner for Communications on all aspects of informational programs and communications policy and technology.

**GS-15 Executive Officer:** This position is located in the Office of the Regional Commissioner (ORC), Office of the Deputy Commissioner, Operations. The Executive Officer serves as staff director and key advisor to the Regional Commissioner (RC). The incumbent assists the RC in planning and implementing comprehensive regional programs, coordinates regional program administration, provides substantive and procedural guidance to the regional executive staff and provides overall coordination to the immediate staff of the RC. Assists the RC in the overall management of the region. Implements many RC decisions personally and follows up with executive staff on other decisions to ensure that they have been implemented. Provides confidential advice to the RC on especially sensitive or complex issues.

**GS-15 Operations Training Vision Manager:** Serves as the principal advisor to the Lead Executive for Training on a broad range of operational training initiatives and planning activities with national impact. The incumbent provides both short- and long-term strategic and tactical planning for training for Operations, and oversight of Operations entry-level training, ASC/SLC training, and management training, and other national training activities. Provides authoritative studies, information, evaluations and recommendations on all phases of Operations training needs, resources and systems needed for use in establishing priorities, allocating resources, formulating Operations policies, and managing future training in Operations. Acts as DCO focal

point for planning and implementation of Operations Training Vision (OTV) issues, which have a major impact on the agency through the program's DCO administrators. Supervises a small staff of 7-10 analysts, studio technicians, web and content designers, and training experts.

**GS-14 Equal Employment Manager:** The Equal Employment Manager manages the equal opportunity program for a region. As the SSA regional authority on equal opportunity, develops, administers, and evaluates all such programs in the region. Coordinates SSA's activities in these areas for the employment and advancement of minorities and women and develops programs aimed at assuring quality of services provided by SSA to the broad cross section of the public within the region. Serves as advisor to both regional and headquarters management on the development and interpretation of policies and guidelines. Recommends strategies to resolve controversial agency wide issues.

**GS-13 Public Affairs Specialist (PAS):** The PAS represents the views and concerns of the Agency in performing a wide variety of duties in the operation of a comprehensive SSA public information and external affairs program in one of ten SSA regions.

**GS-13 Executive Assistant:** As a key member of the Regional Commissioner's (RC's) staff, the Executive Assistant provides a variety of high-level coordinative, consultative and advisory services relating to social insurance program administration, operations and management issues in the regional office. The Executive Assistant assists the RC in the evaluation and implementation of plans for achieving immediate and long-range goals and objectives and provides staff advice in support of planning

**GS-13 Support Services Specialist:** The Support Services Specialist is assigned to a specific SSA region and develops authoritative recommendations regarding support services program policy throughout the region. The Support Service Specialist is a recognized expert providing advice and consulting services on new developments and advances in a variety of administrative service areas such as building management, property management, space management, lease administration, procurement, telecommunications, equipment and supply management. Ensures that the full-range of logistic and facility needs of leased or owned buildings in the region are met.

**Assistant Regional Commissioner for Management and Operations Support (ARC-MOS), SES:** The Assistant Regional Commissioner for Management and Operations Support (ARCMOS) provides executive leadership and direction to the region in the areas of program policy, systems, finance, human resources and management support, and provides executive leadership and direction for assigned Office of Operations-wide initiatives. Through subordinate supervisors or team leaders is accountable for the evaluation, implementation and management of program policies and procedures; service delivery and related initiatives; legislative changes; management planning and analysis; systems support and automation; management information; workforce planning and utilization; program training and staff development; position and organization management; facilities, space, procurement and property management; personnel administration and management; labor relations; security and integrity. The ARC-MOS provides executive leadership, direction and oversight responsibility to the regional disability program, including technical, financial and administrative support of the State Disability Determination



Services (DDS). The ARC-MOS also has executive responsibility for the administrative and personnel administrative support for other regional components, e.g., Regional Office of Quality Assurance and Performance Assessment, Office of Hearings and Appeals, and Office of the General Counsel.

**Assistant Regional Commissioner for Processing Center Operations (ARC-PCO), SES:**

Serves as a member of the Regional Commissioner's Executive Staff, participating in the overall direction of Social Security matters in one of the major or geographical service areas of the country. Provides executive leadership and direction in planning and carrying out the Processing Center's total mission, including processing claims for certification of retirement, survivors and disability benefit payment to a large segment of the nation's population.

**GS-15 Deputy Assistant Regional Commissioner (DARC-MOS, DARC-PCO):** The deputy serves as full deputy and "alter ego" to the Assistant Regional Commissioner and is responsible and accountable for the overall program management, direction, planning, objectives, policy-making and coordination of the functions of the office. The deputy shares responsibility with the ARC as the region's executive for assigned DCO-wide initiatives.

**GS-15 Center Director:** The Center Director directs one or more of the following regional programs: Disability, Program Support, Security and Integrity, Automation, Human Resources or Materiel Resources.

- Disability includes: providing management, leadership, oversight, supervision and guidance to (and through) Disability Program Administrators, supervisors and team leaders to regional office staff responsible for the evaluation, implementation and management of the national disability program in the assigned region. Through staff and directly, provides program coordination and administrative guidance to State Disability Determination Services (DDS) administrators.
- Program Support includes: providing leadership and direction in the development and application of Retirement and Survivors Insurance (RSI), and Supplemental Security Income (SSI) program polices and other operational procedures such as enumeration, Medicare, and attorney fee agreements, etc.
- Automation includes: providing leadership and direction in programmatic systems, management information, the creation and use of new web-based tools and automation resources and expert support to all SSA staff and offices in the region.
- Security and Integrity includes: providing leadership and direction region-wide, including Office of General Counsel (OGC), Office of Disability Adjudication and Review (ODAR) and Office of Quality Performance (OQP) evaluation, implementation, and management of systems security, program and administrative integrity, and fraud prevention and detection.
- Human Resources includes: recruiting, retention, succession planning and staffing; labor and employee relations; classification and pay; employee benefits and work/life

initiatives; HR administration, timekeeping and payroll services; entry level, technical, management and common needs training; and employee/career development.

- **Materiel Resources** includes: region-wide responsibility for budget and financial management; purchasing and procurement; health and safety; leasing and office environment; space and physical security; facilities and supply management; and travel and staffing plans.

**GS-14 Deputy Center Director:** The Deputy Center Director serves as full deputy and "alter ego" to the Director for the Center for Automation or Center for Program Support and is responsible and accountable for the overall program management, direction, planning, objectives, policy-making and coordination of the Center. Assumes full responsibility for operations in the absence of the Center Director and acts on all matters with full authority of commitment within assigned jurisdiction.

**GS-14 Disability Program Administrator:** The incumbent serves as the Federal official responsible for ensuring that Disability Determination Services (DDS) and/or federal disability processing units perform in a satisfactory manner and are in compliance with negotiated agreements and Federal regulations. Also responsible for ensuring SSA field offices in the state(s) fulfill their responsibility for providing information to the DDS and coordinate with state agencies as necessary.

**GS-13 Supervisory Management and Program Analyst:** Supervisory Management and Program Analysts serve as a first line supervisor in the SSA Regional Office with responsibility for organizing and leading staff members, coordinating staff projects, assessing results and performance of a staff. Supervises a staff of employees involved in planning, developing, implementing and monitoring a variety of projects, processes and analyses relating to one or more of the following: financial management; facilities management (building, space and property management, health and safety); management information; management planning and analysis; training; personnel management; administrative management.

**GS-13 Supervisory Social Insurance Specialist:** The Supervisory Social Insurance Specialist provides supervision and guidance to and through team leaders or comparable personnel to Center for Disability (CD), Center for Program Support (CPS), Center for Security and Integrity (CSI), or Center for Automation (CA) staff responsible for one or more regional programs. All professional, technical and clerical staff under the supervision of the Supervisor Social Insurance Specialist provides support to regional, field, program service center, and teleservice center involved in carrying out the retirement, survivors, disability and supplemental security income and supporting administrative programs. Provides advice and information to management regarding the Agency and the Region's program(s) assigned.

**GS-13 Financial Management Specialist:** The Financial Management Specialist serves as the regional expert in the management of SSA financial resources in an assigned region. The Financial Management Specialist also serves as financial advisor to regional management and provides leadership in the analysis, development, and application of policies, practices, and evaluative criteria for the management of the financial resources of the region.

**GS-12 Social Insurance Specialist:** Provides analytical staff support to the Regional Commissioner (RC) and Assistant Regional Commissioner (ARC) for Management and Operations Support. Independently or as a member of a team, plans, develops, implements and monitors a variety of projects and analyses relating to operations/program analysis, program integration, systems and automation support.

**GS-12 Management Analyst:** The Management Analyst provides analytical staff support to the Regional Commissioner (RC) and Assistant Regional Commissioner (ARC) for Management and Operations Support. Independently, or as a member of a team, plans, develops implements and monitors a variety of projects and analyses relating to one of the following: financial management; management information; management planning; personnel management and administrative management.

**GS-13 Human Resources Specialist/ Technical Expert:** The Human Resources Specialist/ Technical Expert serves as a recognized training expert and technical authority and provides expertise in developing, planning, administering and evaluating the Social Security Administration's Human Resources programs. The expert shares in Agency policy making and provides a variety of high-level coordinative and analytical services to regional management, and SSA as a whole, related to regional and national initiatives.

**GS-12 HR Specialist:** The HR Specialist serves as a Human Resources Professional and Consultant to management in one or more human resource programs, such as recruitment, placement, classification, labor relations, employee relations, EEO, employee benefits and information systems.

**GS-13 Lead IT Specialist:** The Lead IT Specialist serves as a team leader in the Regional Office. The Lead IT Specialist leads a group of Information Technology (IT) Specialists who provide support for (1) computer and systems support activity within the components serviced including the administration and support of Local Area Networks (LAN) and Intelligent Workstations (IWS) and (2) implementation and operation of claims and post-entitlement processing systems, management information systems, administrative, programmatic or other comparable systems.

**GS-12 IT Specialist:** The Information Technology (IT) specialist provides has responsibility for various computer projects designed to increase the effectiveness and efficiency of selected administrative and managerial tasks, and processes used by the component, through the reconfiguration of existing data bases, the establishment of standard interfaces for new data bases, the improvement of existing information systems, the design and development of new information systems, and the utilization of innovative design approaches which involve interactive computer enhanced information systems, integrated data bases and communications utilities.

**GS-12 CDI Program Specialist:** The CDI Specialist serves as a program expert for the detection and prevention of fraud and abuse and the development and adjudication of claims filed under programs administered by SSA. The CDI program is a joint effort among Federal and State agencies to identify and prevent fraud in SSA's social insurance and need-based benefit programs.

## **PROGRAM SERVICE CENTER (PSC) POSITIONS**

**GS-13 Module Manager (MM):** The MM provides leadership and supervision to all subordinate supervisors, team leaders, and employees through both oral and written communications. This position is responsible for providing technical direction and leadership to technical employees and may include a small clerical staff. The MM manages the activities and operation of the module/unit to ensure the work of the unit meets all established goals.

**GS-11/12 Assistant Module Manager (AMM):** The AMM serves as full assistant to the module/unit manager, and first line supervisor to technical and administrative employees in the Module/Unit. This position is responsible for providing technical direction and leadership to technical employees and may include a small clerical staff. The AMM assists the MM in managing the activities and operation of the module/unit to ensure the work of the unit meets all established goals.

**GS-12 Claims Technical Expert (CTE):** See Description Above

**GS-5/7/9/11 Claims Specialist (CS):** See Description Above

**GS-11/12 Disability Processing Specialist (DPS):** The DPS serves as an authoritative specialist and program expert in the adjudication of Social Security disability and non-disability cases on the disability staff of the Regional Office or Program Service Centers. The DPS handles the full range of disability determination workload in the Agency, as assigned from field offices, PSCs, OCO and as mutually agreed from Office of Disability Adjudication and Review and state Disability Determination Services. The DPS acts as the technical resource for questions from DDS, PCO and field on all disability related issues, which include complex cases.

**GS-10 Post Entitlement Technical Expert (PETE):** The PETE is responsible for assisting management in improving the timeliness and accuracy of work processed in the module, and for assuring that work assignments, including paperless processing, of Benefit Authorizers and other module personnel are completed timely and in accordance with established procedures. The PETE ensures uniform and proper application of laws, regulations, policies and procedures under titles II, XVI and XVIII of the Social Security Act pertaining to the full range of post-adjudicative issues.

**GS-5/7/9 Benefit Authorizer (BA):** The BA makes final determinations on the full range of post-adjudicative actions, entitlement and non-entitlement to benefits, continuing entitlement to benefits, and the payment amounts thereof. Adjusts established benefits and makes payments through the system or Single Payment System. Initiates and responds to telephone contacts, including the 800 number, to resolve issues or discrepancies and/or explain or obtain information.

**GS-7/8/9 Debt Specialist:** The Debt Specialist reviews and makes final determinations based on facts and applicable laws and regulations, on a variety of overpayment issues in titles II, XVI and XVIII cases. The specialist contacts debtors or field office personnel to develop or explain

complex technical program overpayment issues, waivers and reconsideration requests and to obtain refunds, refund agreements or implement the next step in the recovery process.

**GS-4/5/6 Debtor Contact Representative (DCR):** The DCR performs technical and clerical duties involving contacting debtors for the purpose of examination, collection, control, documentation and disposition of overpayments from all SSA-administered programs as well as assisting the public through SSA's national 800 number.

**GS-9 Lead Customer Service Representative (LCSR):** See Description Above

**GS-5/7/9/11 Customer Service Representative (CSR):** See Description Above

## **TELESERVICE CENTER (TSC) POSITIONS**

**GS-14/15 Teleservice Center/ Mega Teleservice Center Director:** The Director of a teleservice center provides leadership, management direction, and expert advice in its overall management and operation. The director administers both a comprehensive nationwide information and referral program for the public through SSA's 800 number network, and an immediate claims-taking or similar function. The TSC consists of several hundred Customer Service Representatives, as well as Claims Specialists, and other clerical, administrative and support staff.

**GS-12/13/14 Teleservice Center Manager:** Serves as Manager of a teleservice center, responsible for directing and administering a comprehensive information and referral program for the public on all Social Security programs and other State/Federal agency benefits. Directs a staff of technical employees including Customer Service Representatives. Where applicable, also directs an immediate claims-taking unit staffed Claims Specialists.

**GS-9/11/12 Teleservice Center Supervisor:** The Teleservice Center Supervisor provides first-line supervision and technical direction over the workload processing, procedures, systems, security and personnel in a unit of an SSA Teleservice Center.

**GS-9/11/12 Teleservice Center Management Support Specialist (MSS):** The Teleservice MSS provides analysis, advice, consultative services and management support to leadership, managers and supervisors throughout and in the Teleservice Center offices in a region or throughout a Mega Teleservice Center.

**GS-9/11/12 Systems Coordinator (SYSCO):** See Description Above

**GS-5/7/9/11 Claims Specialist (CS):** See Description Above

**GS-9 Lead Customer Service Representative (LCSR):** See Description Above

**GS-4/5/6/7/8 Customer Service Representative (CSR):** See Description Above

## AREA DIRECTOR'S OFFICE (ADO) POSITIONS

**GS-15 Area Director:** The Area Director plans, directs and coordinates the activities of SSA field offices (FOs) and/or teleservice centers (TSCs), within an assigned geographical area. The incumbent also provides executive leadership, vision, oversight, and guidance to managers regarding program operations, personnel administration and general management. The incumbent coordinates and oversees area-wide activities to ensure consistency with Agency policies, procedures and public service indicators. The incumbent develops strategies and implements initiatives to ensure the administration of programs, policies, and objectives are met in the most effective, efficient, accurate, and fiscally responsible manner possible.

**GS-14 Deputy Area Director:** The incumbent serves as full deputy and "alter ego" to the Social Insurance Administrator (Area Director), and is responsible and accountable for the overall program management, direction, planning, objectives, policy-making and coordination of the Office of the Area Director. The incumbent assumes full responsibility for operations in the absence of the Social Insurance Administrator (Area Director) and acts on all matters with full authority of commitment within assigned jurisdiction. The incumbent performs confidential and sensitive assignments for the Area Director and speaks on his/her behalf at internal and external meetings and conferences.

**GS-13 ADO Supervisor:** In an assigned Area, this position provides technical and administrative supervision to a number of specialized temporary projects and to both temporary and continuing staff assigned to the Area Director's Office, such as the Special Disability Workload (SDW) cadres, Area Work Incentives Coordinator (AWIC), the Automation Training Specialists (ATS), Area Systems Coordinators (SYSCOs) or others. Often the employees are out-stationed in District Offices complicating the supervisory responsibilities of this position. At least 25 percent of the incumbent's time is spent supervising work at the GS-12 grade level.

**GS-13 Area Administrative Assistant:** The incumbent performs and coordinates a wide variety of special projects and studies concerning SSA program administration. Leads the work of ad hoc teams responsible for conducting studies and activities having area, regional and/or national impact. Serves as area level focal point and assists the AD in coordinating and monitoring the accomplishment of major management, operational and program goals and initiatives. Coordinates area activities with regional office staff. Implements many of the AD's decisions personally and follows-up with the area's DMs and others to ensure appropriate implementation. Identifies issues requiring resolution and negotiates with DMs, AFGE representatives and members of the Area Office staff to achieve desired results.

**GS-12 Area Operations Analyst:** The incumbent provides operational, management and program analysis and other staff support to the Area Director. Serves as a workload coordinator for the area. Assists in the coordination of operations, security and appraisal activities associated with the functioning of field installations within the AD's designated geographic area of responsibility. The incumbent continuously monitors office performance and after analysis, provides and negotiates acceptance of recommendations that result in more effective operations and better service to the public. Provides information and assistance to district management in a variety of areas. May handle some or all of the ADO's administrative responsibilities in budget, overtime, FTE control and training.

**GS-5/7/9 Management Analyst:** The incumbent serves as the primary liaison between the area field offices and the regional office for the Area Director (AD) on activities relating to staffing, budget, and other administrative issues. Within established guidelines, the incumbent exercises appropriate judgment, establishes work priorities to meet various problems and situations, and ensures that priorities are maintained.

**GS-11/12 Area Work Incentives Coordinator:** The incumbent provides staff support to the Area Director (AD) to ensure consistency of interpretation, coordination, application and dissemination of the Social Security Administration's (SSA) work incentives provisions, focusing on those contained in the Ticket to Work and Self-Sufficiency Program and the Work Incentives Outreach Program statutes. In conjunction with other AWICs, participates in the development, administration and assessment of Area policies and procedures to ensure that they are consistent with, and supportive of, Regional and National work incentive goals. The incumbent serves as the Area expert on Title II and Title XVI work incentives and processes and return to work issues, and as the focal point for their dissemination throughout the Area to entities such as: field office (FO) management and key staff; employment support agencies, organizations and advocacy groups; and Ticket partners, Program Navigators, grantees, private employers and congressional staffs.

- **NOTE:** While this position is organizationally located under the Area Director's Office (ADO), incumbents in this position are out-stationed in the Field Offices (FOs).

**GS-12 Public Affairs Specialist:** This position supports an Area Director's office whose jurisdiction encompasses a major metropolitan area or an equivalent serviced population. The incumbent is responsible for the planning, developing, organizing and implementing of all major media and special interest group contacts throughout the Area Director's jurisdiction. By developing, implementing, maintaining and modifying a proactive and aggressive public information/public relations (PI/PR) program, the incumbent ensures that the public is properly informed as to the solvency, direction and purpose of SSA programs.

- **NOTE:** While this position is organizationally located under the Area Director's Office (ADO), incumbents in this position are out-stationed in the Field Offices (FOs).

**GS-12 Plan for Achieving Self-Support (PASS) Specialist:** The incumbent serves as an expert on the Plan to Achieve Self Support (PASS) provision of the Supplemental Security Income program. Independently provides technical guidance in self-support plan development; approves or denies self-support plans; and initiates, coordinates and conducts training and outreach seminars on PASS and other work incentive opportunities.

- **NOTE:** The incumbent may work for a Program Service Center, Area Director's Office, Field Office or a Regional Office.

## **FIELD OFFICE (FO) POSITIONS**

**GS-14 (Level 1 Office); GS-13 (Level 2 Office) District Manager (DM):** The DM is responsible for administering all phases of the programs of the Social Security Administration within a designated service area. He/she plans, organizes, directs and controls program activities in one or more offices; provides managerial and administrative oversight over all resources of the office, including facility services, equipment, security, and staff; exercises responsibility for public information/public relations, regularly conducts negotiations, and may maintain liaison with most of the principal administrators of State agencies; coordinates social security program matters with a substantial number of large employers, colleges, institutions, and other governmental agencies; participates in local programs related community activities.

**GS-13 (Level 1 Office); GS-12 (Level 2 Office) Assistant District Manager (ADM):** The ADM serves as full deputy and "alter ego" to the District Manager and is responsible and accountable for the overall program management, direction, planning, objectives, policy-making, and coordination of a field office. The ADM assumes full responsibility for operations in the absence of the District Manager and acts on all matters with full authority of commitment within assigned jurisdiction.

**GS-12 Operations Supervisor (OS):** The OS provides administrative and managerial assistance in all phases of the programs administered by the Social Security Administration. Participates in planning, organizing, directing and accomplishing management objectives as part of the management staff; provides first-line supervision of the performance and conduct of subordinate staff by providing technical guidance, training and administrative oversight to a typical staff of Technical Experts, Claims Specialists, Customer Service Representatives, and other support staff.

**GS-11/12 Management Support Specialist (MSS):** The MSS functions as a leader of Claims Specialists and other employees in area field offices and provides administrative support; in many offices, the MSS duties mirror those of an Operations Supervisor, however an MSS can only participate in employee performance discussions and not sign off as the official appraiser.

**GS-9/11/12 Systems Coordinator (SYSCO):** The SYSCO provides direction and support to assigned organizations for all matters pertaining to the delivery of Social Security programs and services using automated and electronic processing systems. This involves testing (i.e. piloting, proof of concepts), implementing and maintaining systems including all related hardware/software, telecommunications, and security protocols. Responsibilities may also include automation training encompassing the use of new hardware devices, automated tools, workload processing or control systems, and related management information. The SYSCO serves as a liaison on systems issues among local, regional, and headquarters staff, other SSA components and outside entities such as Disability Determination Services, private employers, vendors, and state/local government agencies.

- **NOTE:** The position is located in multiple components throughout the Operations structure, including Field Offices (FOs), Program Service Centers (PSCs), and Teleservice Centers (TSCs).



**GS-12 Claims Technical Expert (CTE):** The CTE provides a focal point for ensuring high quality case processing by technical leadership for Title II, Title XVI, and/or Title XVIII claims issues, by consultation and technical mentoring of other employees, and by coordination of new initiatives and workload projects. In addition, the CTE serves as an expert who develops and adjudicates claims, reconsiderations, and post-entitlement workloads including the most complex claims for SSA programs and cases associated with high profile or sensitive workloads, domestically and/or internationally.

- **NOTE:** The position is located in multiple components throughout the Operations structure, including Field Offices (FOs), Program Service Centers (PSCs), and Teleservice Centers (TSCs).

**GS-5/7/9/11 Claims Specialist (CS):** The CS is a keystone position of the Social Security Administration that authorizes entitlements to programs administered by the agency. The CS reviews and authorizes claims and other complex determinations for benefits under Titles II, XVI and/or XVIII of the Social Security Act.

- **NOTE:** The position is located in multiple components throughout the Operations structure, including Field Offices (FOs), Program Service Centers (PSCs), Foreign Service Posts (FSPs), Workload Service Centers (WSCs), Workload Support Units (WSUs), Teleservice Centers (TSCs) and the Office of Central Operations (OCO) Processing Centers (PCs). Performs duties involved in one or more of the following: Title II, Title XVI, XVIII, a generalist in Title II, XVI, and XVIII, a field representative, a foreign claims specialist, a claims authorization specialist in a PSC or PC, a specialist in a WSC/WSU, or a combination of the above.

**GS-9 Lead Customer Service Representative (LCSR):** The LCSR serves as the work leader and provides technical assistance and guidance to Customer Service Representatives located in multiple components throughout the Operations structure.

- **NOTE:** The position may be located in multiple components throughout the Operations structure, including Field Offices (FOs), Program Service Centers (PSCs), Foreign Service Posts (FSPs), Workload Service Centers (WSCs), Workload Support Units (WSUs), Teleservice Centers (TSCs) and the Office of Central Operations (OCO) Processing Centers (PCs). Performs duties involved in one or more of the following: a service representative in an FO, a teleservice representative in a TSC, a customer service technician in a PSC or OCO or a combination of the above.

**GS-4/5/6/7/8 Customer Service Representative (CSR):** The CSR is one of Social Security's cornerstone positions; the CSR provides a full range of assistance to beneficiaries, recipients, and the public, by telephone, in person, by correspondence, and/or through digital media, regarding all programs administered by the agency, using a wide variety of systems tools and applications.

- **NOTE:** The position may be located in multiple components throughout the Operations structure, including Field Offices (FOs), Program Service Centers (PSCs), Foreign Service Posts (FSPs), Workload Service Centers (WSCs), Workload Support Units

(WSUs), Teleservice Centers (TSCs) and the Office of Central Operations (OCO) Processing Centers (PCs). Performs duties involved in one or more of the following: a service representative in an FO, a teleservice representative in a TSC, a customer service technician in a PSC or OCO or a combination of the above.

**GS-4/5 Claims Assistant (OA):** The Claims Assistant serves as a development clerk in the field office by providing assistance to beneficiaries and inquirers as well as providing a full range of support for claims representatives and service representatives and other technical/professional positions in these offices.

**GS-6/7/8 District Office Administrative Assistant (OA):** The OA performs a variety of administrative, secretarial and clerical duties in support of the District Manager and his subordinate supervisors; keeps informed of changes in personnel regulations, policies, and procedures; alerts supervisors and employees to significant changes; initiates personnel actions for the office to establish new jobs, fill vacancies, and effect promotions.

## **DEPUTY COMMISSIONER FOR OPERATIONS SUPPORT STAFF (DCOSS) POSITIONS**

**Deputy Commissioner, Operations, SES:** The Deputy Commissioner, Operations, shares full responsibility with the Commissioner for the full range of operations functions to assure efficient and effective delivery of services to the public. The incumbent provides executive leadership, direction and coordination for the development of policies, positions and perspectives regarding the delivery of social welfare and social insurance services to the public. He/she develops operations goals and objectives and identifies current and emerging problems. The incumbent recommends, negotiates and implements actions to ensure that Social Security operations are effectively and efficiently administered.

**Assistant Deputy Commissioner, Operation, SESs:** The Assistant Deputy Commissioner, Operations (DCO) shares functional responsibilities with the Deputy Commissioner for Operations by providing executive leadership in managing the SSA operations organization. He/she assists the Deputy Commissioner in establishing overall goals and objectives, and identifies current and emerging problems. He/she provides executive leadership, direction and coordination to the development of policies, positions and perspectives with respect to the delivery of social welfare and social insurance services to the public.

**Senior Advisor to Deputy Commissioner, Operations, SES:** The Senior Advisor to the Deputy Commissioner for Operations is a key senior executive in the immediate Office of the Deputy Commissioner, Office of Operations with responsibility for representing the policy views and goals of the Deputy Commissioner for Operations. In this capacity, s/he is responsible for providing a variety of high-level advisory, coordinative, analytical and consultative services to the Deputy Commissioner and/or Assistant Deputy Commissioner for Operations and others relating to a wide range of sensitive and complex RSDI and SSI program operations and Disability Determination Services issues. This includes responsibility for overall planning and development of proposals for improvements in Agency claims processing operations, developing

consistent and equitable management philosophies, and interpreting and clarifying Agency goals in light of the overarching Agency mission.

**GS-15 Executive Officer (DCO Front Office):** The Executive Officer is responsible for providing overall direction to a staff in the immediate office of the Deputy Commissioner for Operations (DCO) responsible for providing comprehensive and authoritative staff assistance to the Deputy Commissioner. As a member of the Deputy Commissioner's top staff, directs special studies and projects either upon specific assignment by the Deputy Commissioner or upon own initiative. These special studies and projects may involve review, evaluation and recommendations for improvement in existing organizations, policies, issues and practices as well as analysis and recommendations for proposed areas. Consults and coordinates with other offices of SSA on matters of mutual concern. Serves as a personal representative of the Deputy Commissioner on various interagency and Administration-wide committees, task forces, work groups, etc., to resolve problems or plan activities of interagency and agency-wide concern/interest.

**GS-15 Senior Program Advisor (DCO Front Office):** Serves as a senior advisor to the Deputy Commissioner for Operations (DCO) and the Assistant Deputy Commissioners (ADC) on a broad range of operational initiatives and activities that have nation-wide impact. Because of Operations' size and complexity, the incumbent provides high level coordination and collaboration for complex, sensitive and unprecedented issues including but not limited to resource management, operating policy, program policy, procedures, federal state relationships, Congressional concerns, and national budget impact issues including state budget considerations, economic impact issues and sustainability. Supplies advice and guidance, not only to the DCO and Assistant Deputy Commissioners (ADCs), but also to other members of the Executive Staff, on a wide variety of Operations related policies, procedures and issues. Resolves problems that have a major impact on the Agency through the programs it administers. Serves as a special assistant to the DCO and ADCs for the overall management, direction and coordination of DCO program components and activities, including liaison for SSA region\field operations and DCO Headquarters components.

**GS-14 Project Manager (DCO Front Office):** Serves as a program expert and project manager in the Office of the Deputy Commissioner for Operations (DCO), providing program expertise, management and direction for cross-cutting activities to ensure the effectiveness and efficiency of operations under the authority of the Deputy Commissioner, nationwide. Provides technical advice and assistance to the Deputy Commissioner, Assistant Deputy Commissioner, ACs, Regional Commissioners and other DCO managers in planning, formulating and implementing administrative management policies. Provides advice on and evaluates various aspects of DCO operations to ensure effective workload or position management, work power utilization and management planning and analysis to ensure the overall effectiveness and efficiency of the regional offices, field offices, program service centers, teleservice centers and headquarters staff.

**GS-13 Executive Assistant (DCO Front Office):** Provides technical and administrative advice and assistance to the Deputy Commissioner, operations, in a wide range of sensitive and complex assignments. Carries out, coordinates and prepares reports on a variety of special projects and assignments on behalf of the Deputy Commissioner which include studies or assignments that do not fall within the jurisdiction of a specific component, at times including several SSA offices

and the regions, or that involve controversial, sensitive or confidential matters or matters of extreme urgency and highest priority. Requests, organizes, and researches background and briefing material on management and operational matters for use by the Deputy Commissioner. Receives Deputy Commissioner correspondence after initial secretarial screening. Analyzes the correspondence both to keep on top of evolving issues and to determine what needs the Deputy's personal attention. Resolves many issues and problems or develops information to the point of a decision by the Deputy.

**Associate Commissioner (Office of Public Service and Operations Support, Office of Customer Service, Office of Electronic Services and Technology, Office of Disability Determinations), SES:**

- **OPSOS:** The Associate Commissioner (AC) for the Office of Public Service and Operations Support, is responsible for providing operations analysis, program integration and management planning and analysis in support of the Deputy Commissioner, Operations, (DCO) and for conducting studies and analyses related to the overall effectiveness and efficiency of the regional offices, district/branch offices, teleservice centers, processing centers and the Office of Central Operations. The incumbent directs and/or coordinates all internal management support functions to ensure effective position management, manpower utilization and management planning and analysis.
- **OCS:** The Associate Commissioner for Customer Service is responsible for providing leadership in the design, implementation, oversight, and re-engineering of business processes that affect the customer experience. The incumbent plans, organizes and directs all activities of the Office of Customer Service and is directly responsible for the accomplishment of the organization's mission by monitoring service delivery and performance, analyzing customer feedback, and identifying solutions that improve the customer's experience through a wide range of service delivery channels. The incumbent provides broad operational support in the areas of service delivery plans, operational strategies, and quality. This includes national oversight and direct support for SSA's Call Answering Sites, Field Offices (FOs), Workload Support Units (WSUs), and Program Service Centers (PSCs). This also includes evaluating SSA's telephone service to the public delivered by the National 800 Number (N8NN) and field office networks.
- **OEST:** The Associate Commissioner for Electronic Services and Technology is the agency's lead executive for the development and implementation of programmatic electronic services that advance the efficient delivery of services to the public. This includes coordinating the overall agency requirements and fostering a collaborative framework among various agency components involved with electronic service delivery. The incumbent oversees the work of an organization responsible for defining the Office of Operations' requirements for software, hardware, and electronic service delivery support and, in collaboration with the agency's Office of Systems, for ensuring that the most state-of-the-art

technology is integrated into the operations across all components of the Office of Operations.

- **ODD:** The Associate Commissioner for Disability Determinations is the executive responsible and accountable for all operational standards, instructions, operational and procedural advice, technical support, and management direction to Social Security Administration headquarters, regional office and field components, and State agencies in support of the SSA-administered disability programs. The incumbent oversees the processing of State agency workloads on a temporary or transitional basis and evaluates the impact of policy and procedural changes on State agency operations.

**Deputy Associate Commissioner (OPSOS, OCS, OEST, ODD), SES:** Incumbent serves as full deputy and “alter-ego” to the Associate Commissioner. In the absence of the Associate Commissioner, the incumbent assumes full responsibility for Office operations and acts on any and all matters with full authority of commitment on matters within the jurisdiction of the Associate Commissioner.

**GS-15 Senior Advisor, Senior Customer Contact Officer, or Project Leader (OPSOS, OEST, OCS, ODD, DCPS-CPO):** The incumbent serves as the principal technical advisor to the Associate Commissioner and the Deputy Associate Commissioners on agency-level program issues and concerns that are of major significance. The incumbent directs major ad hoc initiative for the Associate Commissioner and/or the Deputy Commissioner for Operations (DCO), which usually cut across functional, program and/or interdisciplinary lines and deal with very broad agency-wide concerns that are of major significance. The incumbent handles sensitive and complex issues with discretion and good judgment in all phases of staff activities.

**GS-15 Senior Budget Advisor (OPSOS):** Serves as the focal point for Operations for near-term and long-term strategic planning activities and initiatives affecting nation-wide Operations activities. Ensures that the DCO budget process focuses resources on priority initiatives that support DCO’s strategic objectives and goals. Directs the tracking of DCO performance in relation to established performance measures.

**GS-15 DCO Staff Director, HR (OPSOS):** Serves as the Deputy Commissioner for Operations’ (DCOs’) Senior Advisor and Staff Director for Human Resources (HR). The incumbent is a functional leader and focal point for the resolution of a wide range of difficult and intractable HR management issues for the Associate Commissioner (AC) for the Office of Public Service and Operations Support (OPSOS) and, through that position, to the DCO. DCO HR management issues encompass the following areas: recruitment, retention, merit promotion, technical training, management and leadership training, employee development, awards pay, payroll processing and administration, benefits, work/life issues, performance management, employee relations, classification and personnel administration, HR automation, competitive sourcing, equal employment opportunity and other human capital initiatives. The work involves providing leadership and supervision to a small staff of subordinate employees and functional leadership to the Regional Human Resource Centers nationwide on a wide range of DCO HR management program policies, initiatives, legislative, litigation and procedural changes.

**GS-15 Chief Program Officer (Disability Case Processing System Staff—DCPS):** This position is located in the Chief Program Office for Disability Case Processing Systems (DCPS), Office of the Deputy Commissioner for Operations (DCO). The DCPS program is a multi-year effort to simplify disability determination processing by transitioning from multiple DDS legacy systems to a modern, common case processing system. The incumbent directs major ad hoc initiatives for DCPS, which usually cut across functional, program and/or interdisciplinary lines and may include, but not limited to, any of the following matters: audits, policies related to SSA programs, quality of service, service delivery methods, facilities and security matters, labor relations, staffing, component workflow and controls, and other assigned projects. The incumbent handles sensitive and complex issues with discretion and good judgment in all phases of staff activities. The incumbent is responsible for exercising executive leadership for the consistent support and efficient planning of DCPS's comprehensive planning and resource support necessary to ensure accomplishment of this multi-year initiative.

**GS-15 Supervisory Management/Program Analyst, Division or Center Director (OPSOS, OCS, DCPS-CPO, OEST, ODD):** As a Staff Director provides leadership to staffs involved in internal management support functions to ensure effective position management, workforce utilization and management planning and analysis. Serves as a principal advisor to the AC and Deputy AC on matters related to the ongoing operations of assigned functions.

**GS-15 IT Specialist (Chief Scrum Master) (DCPS-CPO):** Incumbent provides executive leadership, direction and authoritative advice to the Chief Program Officer (CPO) and Deputy CPO. Serves as the Chief Scrum Master and the Agile software development program manager for the Disability Case Processing System (DCPS) program, which is a multi-year IT project to create the program. Through the analysis, planning, and documentation of the DCPS requirements, the incumbent works to ensure compliance with policies, standards, and infrastructures that establish the framework for the DCPS program, which is both national and international in scope. Incumbent leads, coordinates, communicates, integrates and works to ensure alignment with critical agency priorities and the agency's strategic plan. Responsible for ensuring the work efforts achieve the outcome specified within the agency's strategic plan, including appropriate strategic, life cycle management and capital IT investment plans. Work includes project prioritization, evaluation and monitoring, cost schedule management, risk management, quality management and resource allocations.

**GS-15 IT Specialist (Chief Architect) (DCPS-CPO):** The primary purpose of this position is to serve as the Chief Architect and technical overseer for the DCPS program, to ensure integration of the new technology and system into legacy systems and provides national technical leadership into the acquisition of new technical capabilities.

**GS-15 Operations Analyst Expert (OEST):** The incumbent serves as the Operations national lead for regional applications development initiative and may direct other major ad hoc initiatives for the Associate Commissioner or the Deputy Commissioner for Operations (DCO), which usually cut across functional, program and/or interdisciplinary lines and deal with very broad agency-wide concerns that are of major significance. The incumbent serves as the principal technical adviser to the AC and the Deputy AC for assigned projects/studies. The ad hoc projects usually cut across functional, program and/or interdisciplinary lines and deal with very broad agency-wide concerns that are of major significance. The incumbent plans and carries out infrastructure and application projects and initiatives, while ensuring integrated service delivery. Develops and assesses infrastructure project plans and logistics from the point

of view of regional support staffs and end users. The incumbent evaluates project proposals from both the technical and requirements perspective-enabling executives to make key decisions regarding IT strategy.

**GS-14 Executive Officer (DCPS-CPO, OPSOS, OCS, OEST, ODD):** Provides assistance to the Associate Commissioner (AC) and Deputy Associate Commissioner in the overall management and direction of the office. Performs a variety of high-level coordinative, analytical, consultative and advisory services relating to the management and operations of the Office. Acts for or assists the AC/Deputy in managing, coordinating, monitoring, formulating, evaluating and implementing plans for achieving immediate and long-range Office goals and objectives. Provides advice, guidance and assistance to the AC/Deputy in planning, formulating and directing the development and implementation of policies, procedures and systems needed to support office operations.

**GS-14 Deputy Division Director (ODD, OPSOS, OEST):** Serves as full deputy and "alter ego" to the Director, and is responsible and accountable for the overall program management, direction, planning, objectives, policy-making and coordination of the Division. Assumes full responsibility for operations in the absence of the Director and acts on all matters with full authority of commitment within assigned jurisdiction. The incumbent performs confidential and sensitive assignments for the Director and speaks on his/her behalf at internal and external meetings and conferences. The incumbent fulfills the responsibility of this position by either fully sharing with the manager the direction of all phases of the Division's workload or by having continuing responsibility for managing a major part of the Division's workload with total authority and responsibility equally divided between the division director and the deputy.

**GS-14 Technical Expert/Advisor, Lead Program Analyst (ODD, DCPS-CPO, OPSOS, OEST):** Serves as a principal and technical advisor to the Division Director on broad agency-wide initiatives that are of major significance. Provides a variety of high level coordinative, analytical, consultative and advisory services to management related to very visible and complex program initiatives. Provides oral and written reports and conducts briefings on behalf of the Division Director.

**GS-14 Systems Security Technical Specialist (OPSOS):** The incumbent of this position serves as a systems security specialist sharing technical expertise with all DCO regions, components and headquarters DCO Division of Systems Security and Program Integrity (DSSPI) responsible for the tracking, mitigating and validating of system vulnerabilities within DCO. The incumbent is responsible for advising, consulting, and being on the cutting edge of systems security technical policy development and communication in the SSA Operations systems security area; and, its training and awareness programs. In addition, the incumbent provides a variety of analytical, consultative, systems security related and advisory services to Office of Public Service and Operations Support (OPSOS) management.

**GS-14 Team Leader/Project Manager (ODD, DCPS-CPO, OPSOS, OEST):** Plans, organizes and provides direction to a team or teams of specialists providing program expertise, management direction and oversight for cross-cutting segments of operational and programmatic activities for DCO. Ensures that work assignments/projects are carried out by arranging the work among employees to allow timely completion and adequate work for each employee; keeps up

with the status of the work, making appropriate adjustments in accordance with priorities and reports to the AC/Deputy on controversial issues that may arise. Ensures final implementation of approved recommendations.

**GS-14 Branch Chief (DCPS-CPO, OCS):** Provides technical direction and supervision to subordinate staff. Sets priorities and establishes schedules for completion of work, and makes assignments based on priorities, relative difficulty of the assignment and the varying capabilities of the employee. Furnishes advice to the Division Director and other officials on unique or complex programmatic systems problems and issues, and identifies and recommends improvements and changes. Participates with the Division Director in planning and setting overall objectives, plans and policies and contributes to the development, as well as budget/resource projections. Makes decisions on work problems presented by branch members. Collaborates with other branch chiefs and supervisors within DCO to negotiate and/or coordinate work-related changes impacting other organizations. Advises higher echelons of the status of the work assigned, how it relates to the overall mission and what impact or conflicts exist.

**GS-13/14 Operations Leadership Development Program Candidate (DRIVE Program):** The purpose of the program is to provide the candidate, through developmental assignments, with the opportunities to develop the SSA Executive Core Qualifications necessary to become a potential future Operations leader. The candidate participates in the program for one year and selects two developmental assignments along with formal training experiences. are individually tailored to enable the candidate to experience/achieve the goals outlined in the approved Individual Development Plan (IDP). As the program is designed to hone leadership abilities, work assignments maybe supervisory in nature. The length and scope of assignments will vary with the background, work experience and needs of the candidate.

**GS-13/14 IT Specialist (DCPS-CPO):** Serves as a principal planner and advisor to the Office of the Chief Program Officer (CPO) management, working with senior technical and managerial representatives in the development of integrated systems directives, standards, specifications, policies, implementation strategies, management guidelines, procedures, or practices and/or in new developments and advanced techniques in an IT specialty area. Designs and conducts comprehensive agency-wide studies and evaluations, and plans, organizes, and directs studies to develop long range (e.g., 5 to 10 year) IT forecasts and recommendations affecting broad areas of future operations.

**GS-11/12/13 Program/Management Analyst (DCPS-CPO, OPSOS, OEST, ODD):** Serves as a senior analyst in the DCOSS Division, with responsibility for planning, coordinating, and conducting broad studies and analyses related to a variety of initiatives. Conducts analysis of SSA-wide initiatives and identifies activities, issues, potential conflicts and interdependencies that affect the mission, goals and strategic objectives of DCO. Provides expert advice and guidance to OPSOS and DCO management.

**GS-13 Management and Program Analyst (OCS):** The incumbent initiates, plans and independently completes major complex/technical studies of initiatives related to the effective management, operation and future direction of tele-services provided by the national 800 number and FOs. Prepares and reviews written reports and decision papers and conducts briefings, making recommendations for consideration by the Associate Commissioner, Deputy Associate



Commissioner and Center Director. Plans and initiates studies and strategies to implement new and expanded services on the national 800 number network including computer telephone integration. Evaluates pilots and tests to ascertain technological/cost/program efficiency, effectiveness, customer demand and customer satisfaction. Identifies dependencies, impacts and requirements for national rollout.

**GS-13 Systems Analyst (OEST):** The purpose of the position is to contribute to the development of applications and automated business processes that improve the organization's efficiency in accomplishing a wide variety of functions and activities and to provide technical support to management and staff. The incumbent will assist and support the senior systems analyst, in research, technical assessment and security analysis of automated systems.

**GS-13 Financial Specialist (ODD):** The incumbent serves as a senior analyst, with responsibility for monitoring, analyzing, and formulating a variety of fiscal and budgetary issues relating to the disability determination services (DDS). Also, provides guidance and direction to lower level analysts in OFDO regarding DDS financial activities. This includes advice and guidance on DDS fiscal and budgetary matters, preparing fiscal related instructions, procedures, regulations and guides for regional offices and DDSs. The incumbent also has responsibility for major projects and initiatives for which OFDO is responsible. Participates in the development, administration and assessment of policies and procedures related to DCO's management planning and analysis programs.

**GS-13 Program Expert (DCPS-CPO):** The incumbent serves as a senior analyst and/or a recognized program expert in Disability Case Processing System (DCPS) Staff. Responsible for major projects and broad studies pertaining to the development, evaluation, interpretation and maintenance of disability evaluation policy and procedures for administration at all Federal and State levels of the Social Security Disability Insurance Program and the Supplemental Security Income Program for the blind and disabled under title II and title XVI of the Social Security Act.

**GS-12 Management and Acquisition Analyst (DCPS-CPO):** The incumbent serves as a Management Analyst with the responsibility for analyzing, planning, developing, evaluating, coordinating and monitoring management and procurement activities. Duties includes the continuing review of existing systems, requests for enhancements to existing systems and requests for new systems. The employee performs a variety of coordinative and advisory services relating to administration, management, and acquisition operations of Disability Case Processing System (DCPS).

**GS-9/11 Administrative Specialist/Staff Assistant (DCPS-CPO, OCS, ODD):** Serves as a staff assistant in the Office of the Associate Commissioner. Provides staff assistance to the Associate Commissioner by performing a wide variety of coordinative, liaison, administrative, and workflow control services essential to the effective operation of the office.

# Demographic Data For

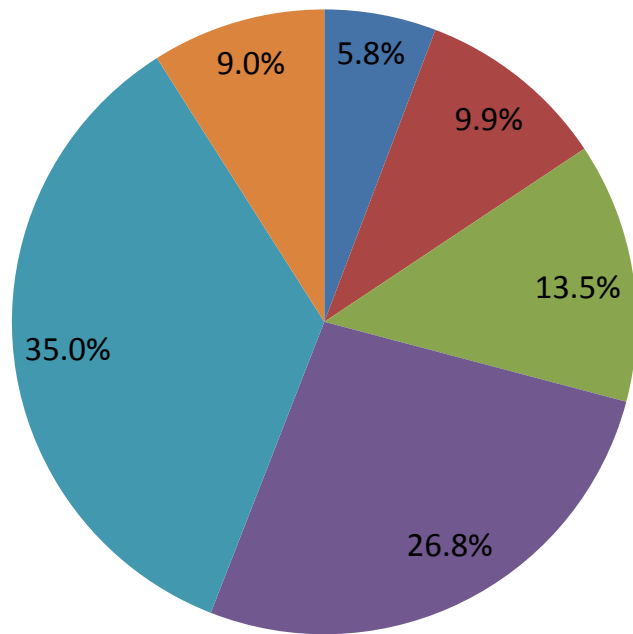
## *my* Social Security

Inception (May 2012) through Sept 2016

# Age of All Users at Registration

Inception (May 2012) through Sept 2016

**Age of All Users at Registration**



Age at Registration	Percentage
Age 18-29	5.8%
Age 30-39	9.9%
Age 40-49	13.5%
Age 50-59	26.8%
Age 60-69	35.0%
Age 70 and Over	9.0%

# Account Creations by State

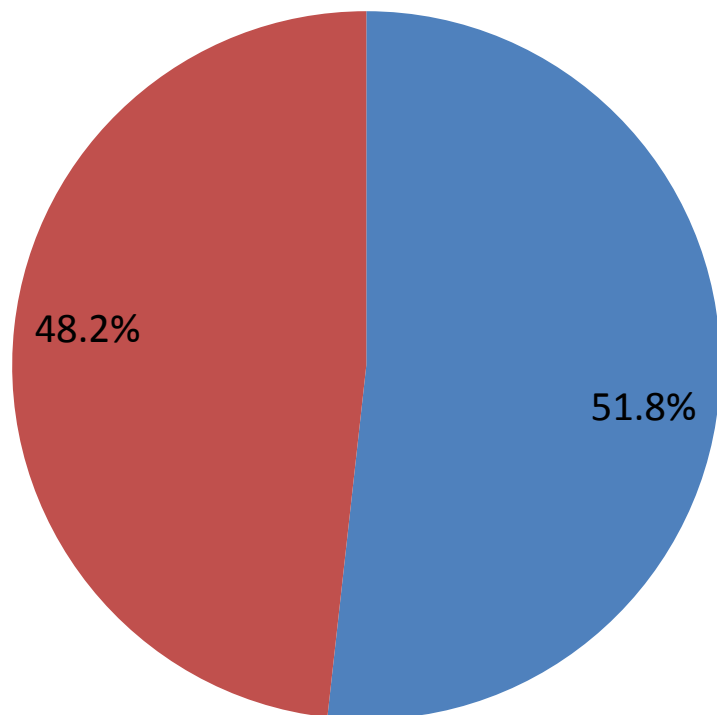
Inception (May 2012) through Sept 2016

Region	Sum of %
01-Boston	5.0%
02-New York	9.0%
03-Philadelphia	10.8%
04-Atlanta	20.0%
05-Chicago	16.8%
06-Dallas	11.1%
07-Kansas City	4.2%
08-Denver	3.5%
09-San Francisco	14.7%
10-Seattle	4.9%

State Percent	State Percent
AF Americas 0.00%	Mississippi 0.63%
AF Asia 0.01%	Missouri 1.87%
AF Europe 0.02%	Montana 0.31%
Alabama 1.32%	Nebraska 0.53%
Alaska 0.24%	Nevada 0.94%
American Samoa 0.00%	New Hampshire 0.54%
Arizona 2.30%	New Jersey 3.02%
Arkansas 0.80%	New Mexico 0.66%
California 11.05%	New York 5.66%
Colorado 1.86%	North Carolina 2.97%
Connecticut 1.16%	North Dakota 0.19%
Delaware 0.33%	Ohio 3.75%
District of Columbia 0.22%	Oklahoma 1.07%
Florida 7.22%	Oregon 1.45%
Georgia 3.30%	Pennsylvania 4.44%
Guam 0.03%	Puerto Rico 0.28%
Hawaii 0.40%	Rhode Island 0.34%
Idaho 0.52%	South Carolina 1.47%
Illinois 3.86%	South Dakota 0.24%
Indiana 2.07%	Tennessee 1.81%
Iowa 0.89%	Texas 7.28%
Kansas 0.91%	Utah 0.73%
Kentucky 1.24%	Vermont 0.24%
Louisiana 1.25%	Virgin Islands 0.02%
Maine 0.48%	Virginia 3.08%
Marshall Islands 0.00%	Washington 2.71%
Maryland 2.17%	West Virginia 0.51%
Massachusetts 2.30%	Wisconsin 1.94%
Michigan 3.37%	Wyoming 0.16%
Minnesota 1.84%	

# Gender of Account Creations

Inception (May 2012) through Sept 2016



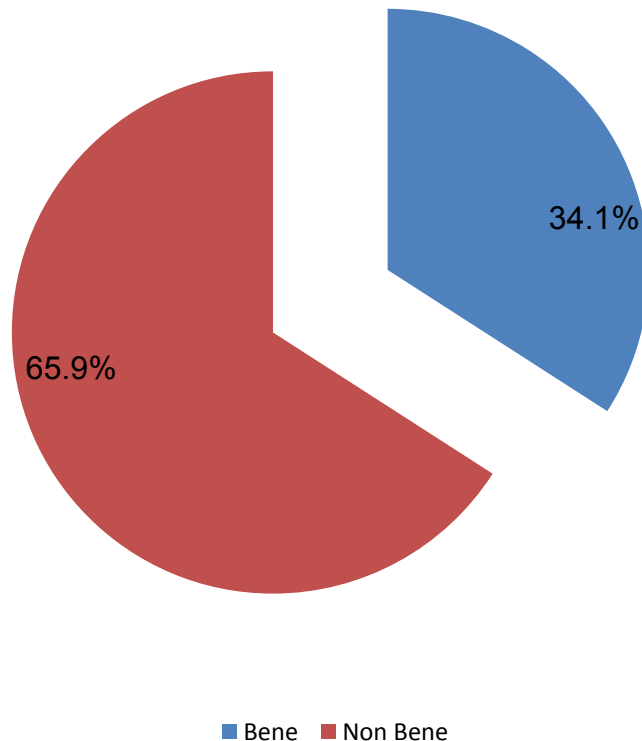
■ Female ■ Male

Gender	Percentage
Female	51.8%
Male	48.2%

# Benefit Status of Account Creations\*

Inception (May 2012) through Sept 2016

**Bene Status of Account Holders**



Status	Percentage
Bene	34.1%
Non-Bene	65.9%

Transition Team Member Document--Non-Public Information. This document may be disclosed to Authorized Transition Team Members only.

\* Benefit Status – counted as a Bene if address verified using SSA programmatic records

November 30, 2016

## **Office of Systems / Office of the Chief Information Officer**

### ➤ Executives

- Rob Klopp, Deputy Commissioner Systems / CIO
- Sylviane Haldiman, Assistant Deputy Commissioner
- Diana Andrews, Assistant Deputy Commissioner
- Tom Grzymiski, Assistant Deputy Commissioner
- Herb Strauss, Deputy Chief Information Officer & Senior Agency Official for Cybersecurity
- John Morenz, Chief Technology Officer

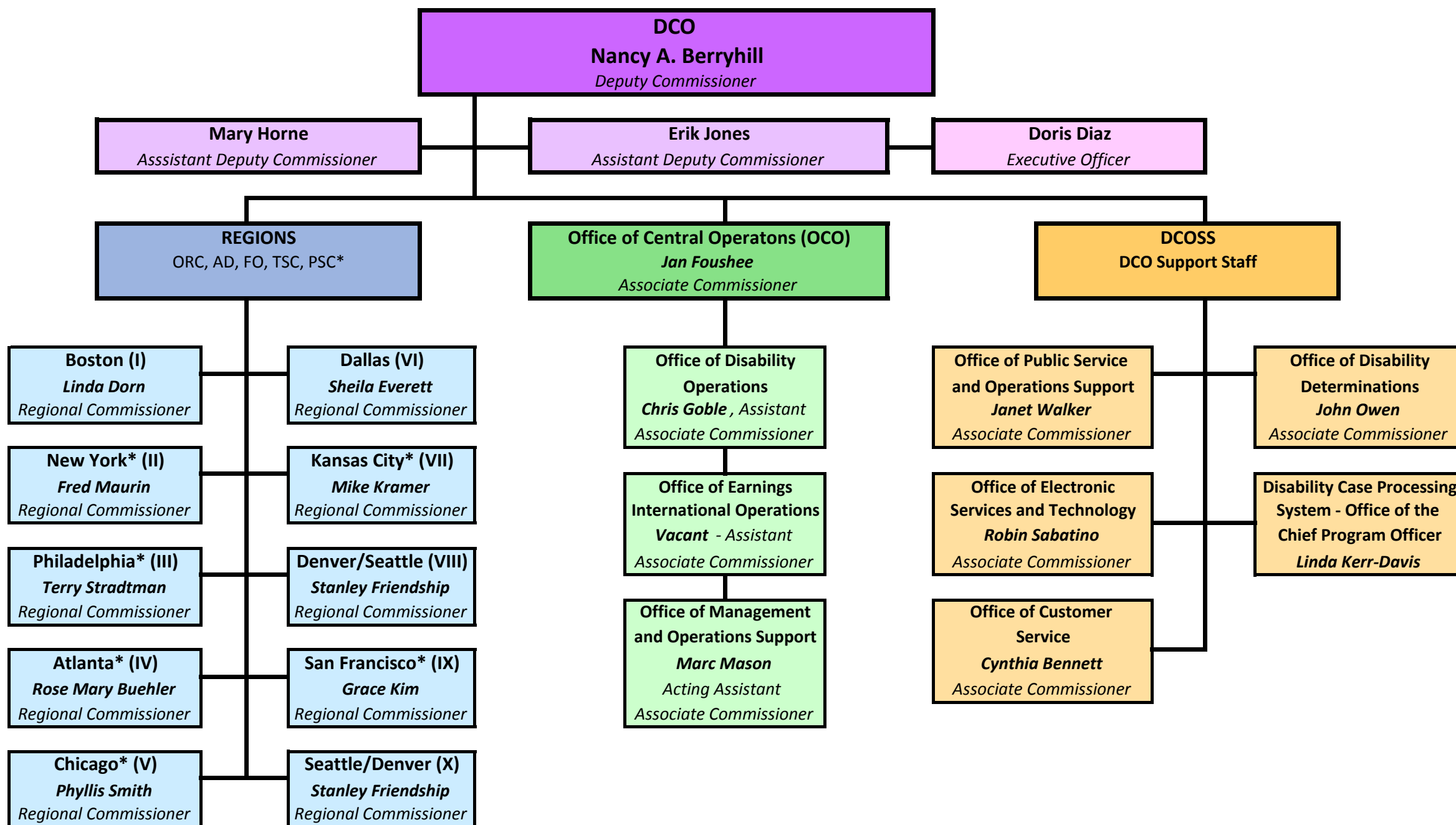
### ➤ Reporting Structure & Functional Overview

- Office of IT Business Support (OITBS) – Sylviane Haldiman — Customer-facing component that interfaces with our business customers and identifies their needs to capture their business requirements and clearly describe what we can do to support these requirements.
  - The following Associate Commissioner-Level components report to OITBS:
    - Office of IT Enterprise Business Support
    - Office of IT Financial Management and Support
    - Office of IT Programmatic Business Support
- Office of Software Engineering (OSE) – Diana Andrews — Develops and provides the software systems and services the business community requires.
  - The following Associate Commissioner-Level components report to OSE:
    - Office of Benefit Information Systems
    - Office of Disability Information Systems
    - Office of Enterprise Information Systems
    - Office of Systems Architecture
- Office of Systems Operations and Hardware Engineering (OSOHE) – Tom Grzymiski — Designs, builds, tests, delivers, operates, manages, and monitors the agency's IT infrastructure.
  - The following Associate Commissioner-Level components report to OSOHE:
    - Office of Hardware Engineering
    - Office of Systems Operations
- Office of Cybersecurity – Herb Strauss — Manages the agency's Cybersecurity Program to protect our information technology resources and data, manage risk and enable the agency's business mission.
  - The following Associate Commissioner-Level component reports to the Office of Cybersecurity:
    - Office of Information Security
- Office of the Chief Technology Officer – John Morenz — Ensures that the agency IT architecture can support the agency's growing and changing needs by leading

technology initiatives to improve the digital services we offer and by developing more effective user interfaces for customer- and business-facing applications.

- 5,647 Staff
  - 3,247 federal employees
  - 2,400 contractors
  
- Staff Locations
  - Main Headquarters complex, Woodlawn, MD
  - National Computer Center, Woodlawn, MD
  - Meadows East Building, Woodlawn, MD
  - Research Triangle Park, Durham, NC
  - 2 Data Centers
    - National Support Center (NSC) in Urbana, MD
      - Occupied in 2015
    - Second Support Center (SSC) in Durham, NC
      - Occupied in 2010
  - 6 Remote Operation Communication Centers
    - Birmingham, AL in the Southeastern Program Service Center (PSC)
    - Chicago, IL in the Great Lakes PSC
    - Kansas City, MO in the Mid-America PSC
    - New York, NY in the Northeastern PSC
    - Philadelphia, PA in the Mid-Atlantic PSC
    - San Francisco, CA in the Western PSC





Office of Budget, Finance, Quality, and Management

Michelle King

Deputy Commissioner

Sean Brune

Assistant Deputy Commissioner

Kate Hickman

Assistant Deputy Commissioner

Audit Liaison

Regina Smith

Gary Hatcher

Systems Support

Jim Guidry

Front Office

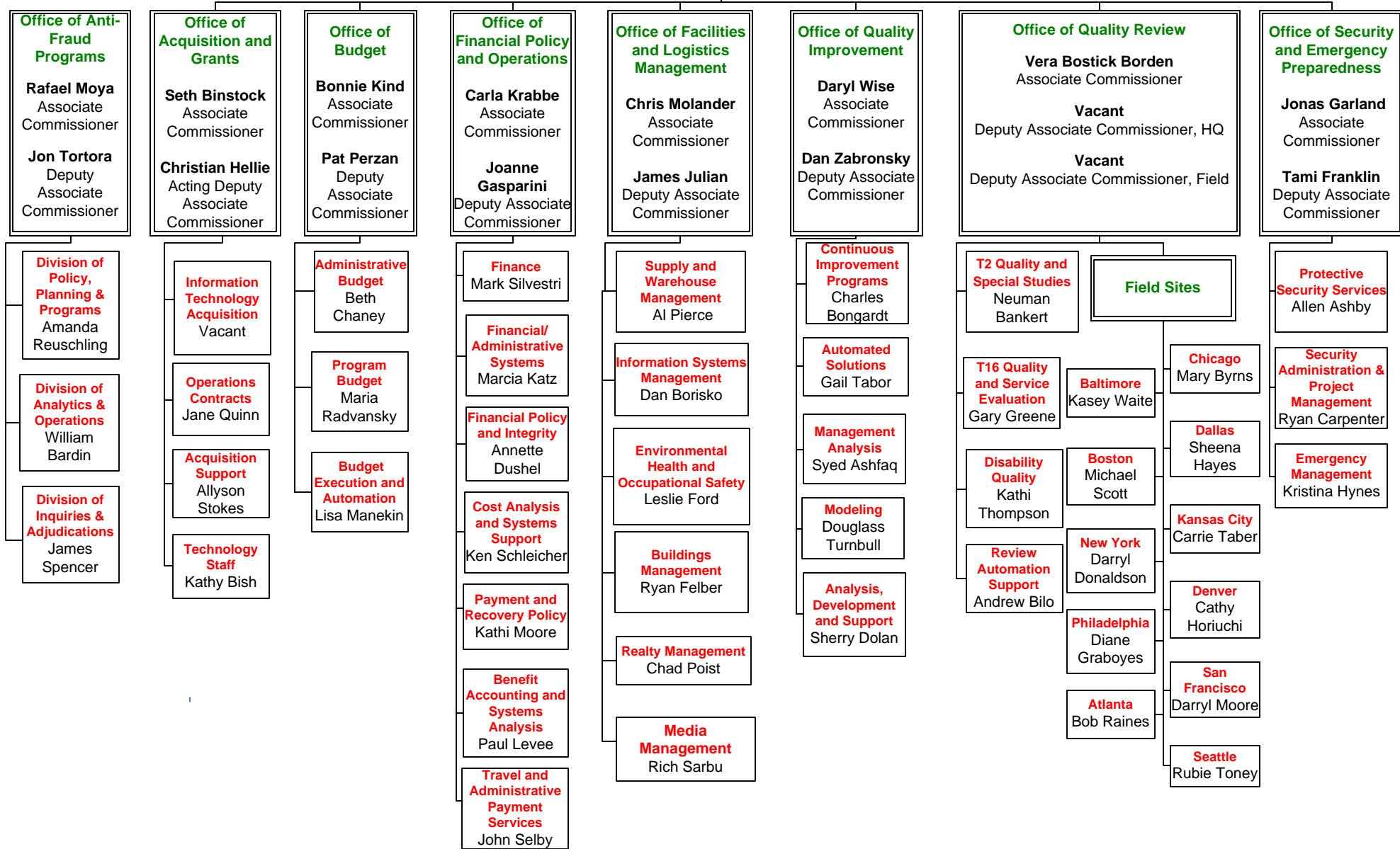
Donna Siegel

Senior Advisor

Management Support

Kevin O'Brien

Executive Officer



**Office of Anti-Fraud Programs  
(OAFP)**

**Rafael Moya**  
Associate Commissioner

**Jon Tortora**  
Deputy Associate Commissioner

**Taren Jones**  
Executive Officer

**Division of Policy, Planning & Programs**

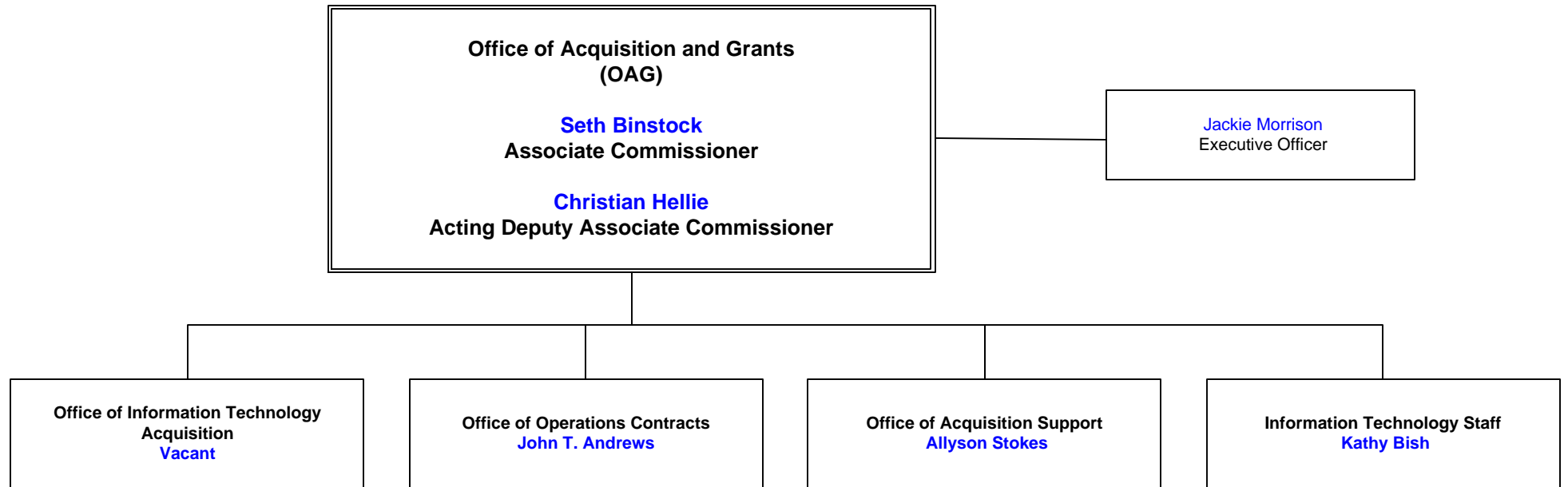
**Amanda Reuschling**  
Director

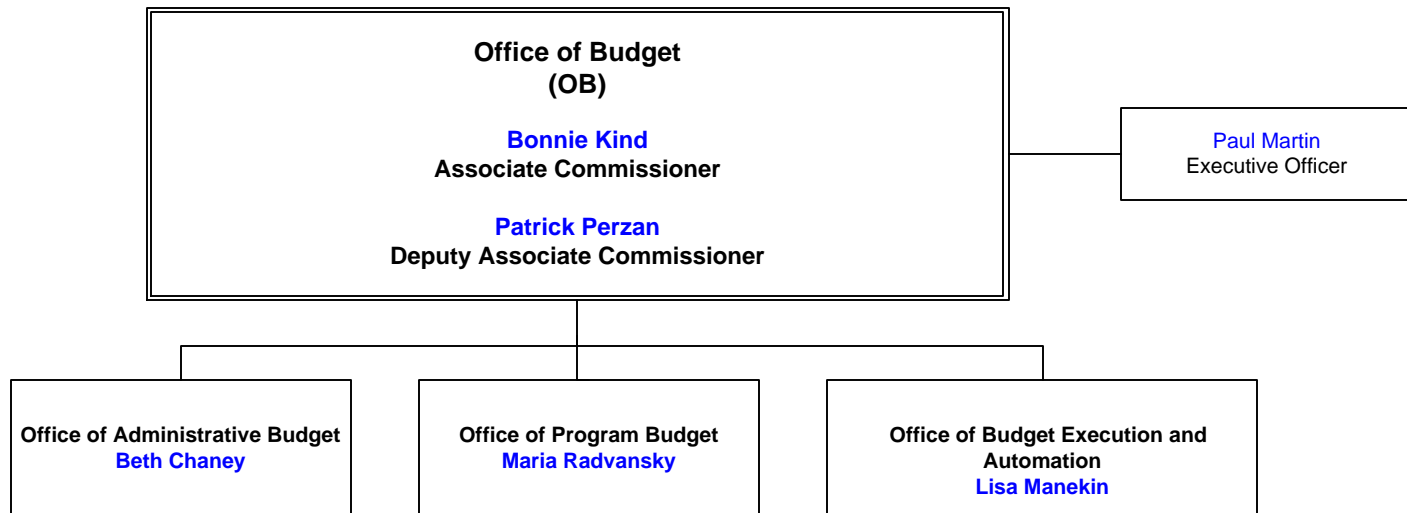
**Division of Analytics & Operations**

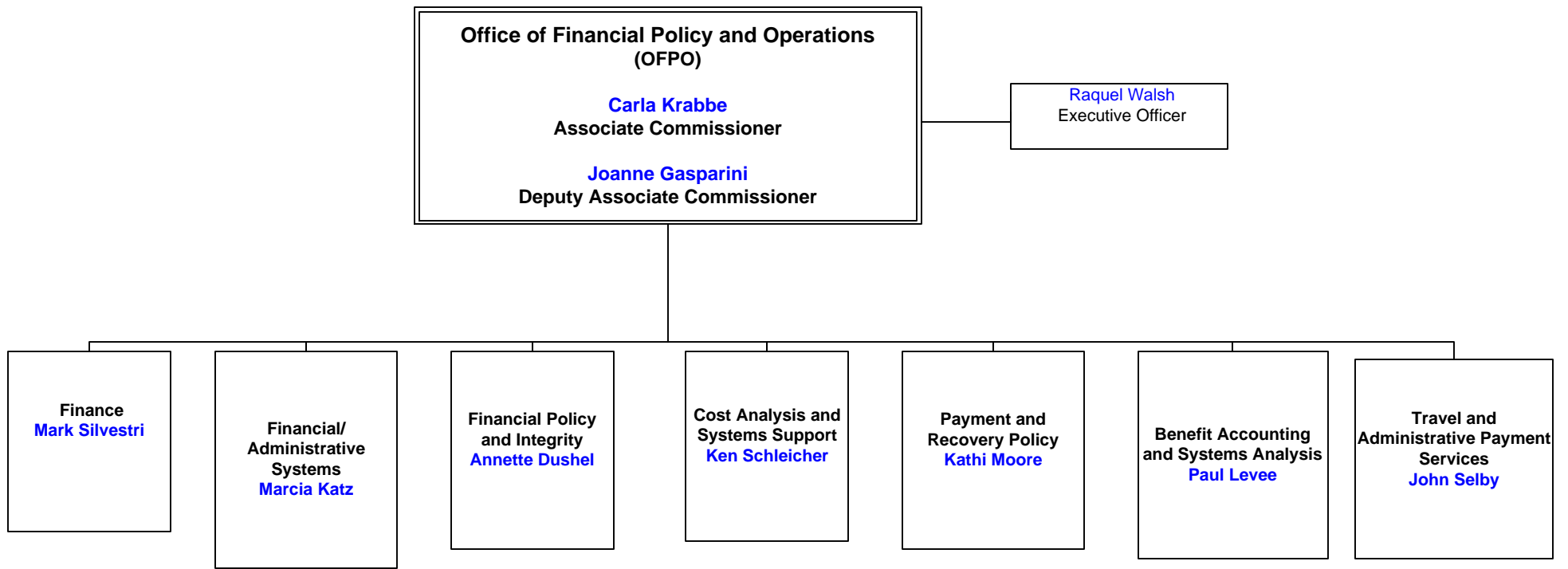
**William Bardin**  
Director

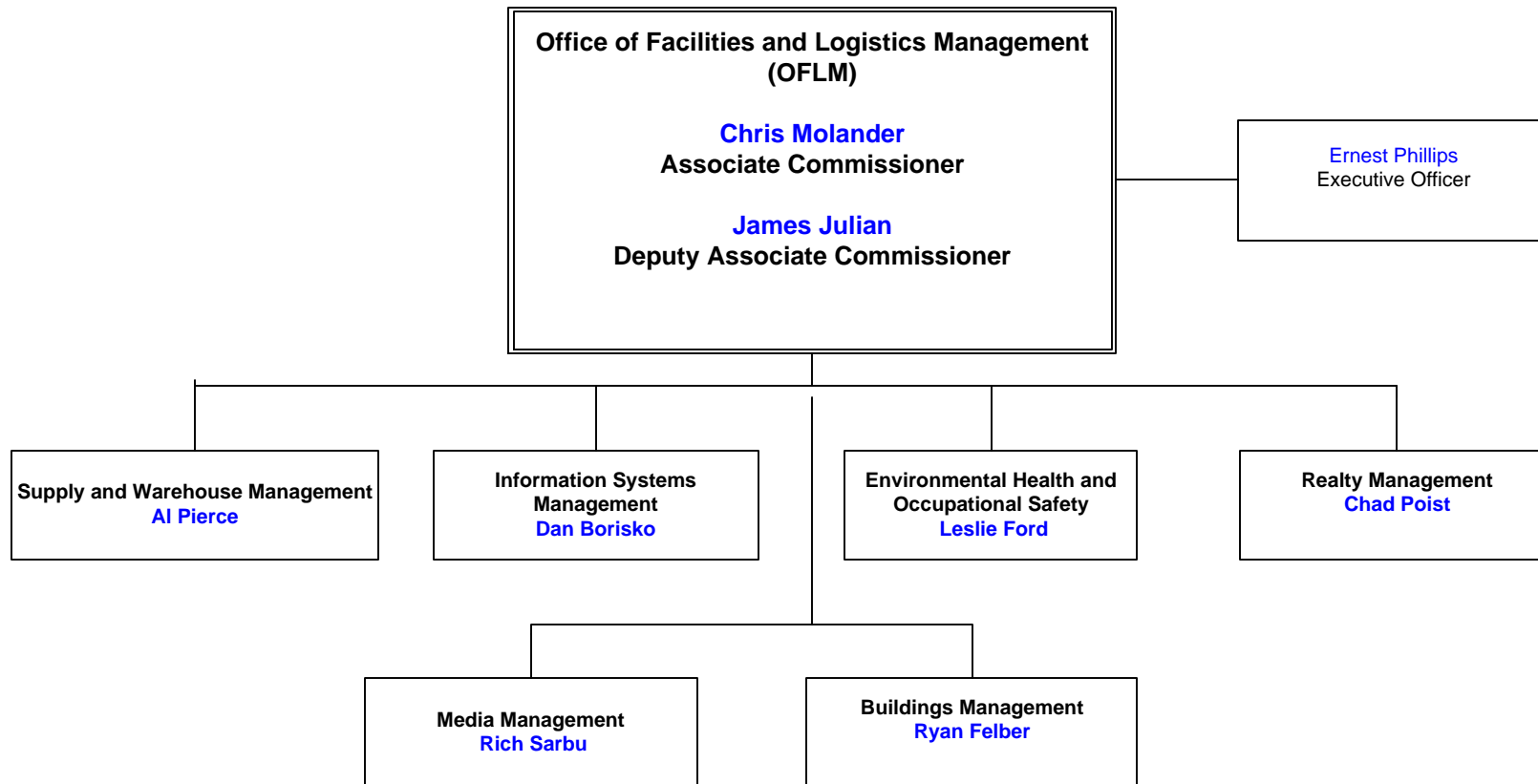
**Division of Inquiries & Adjudications**

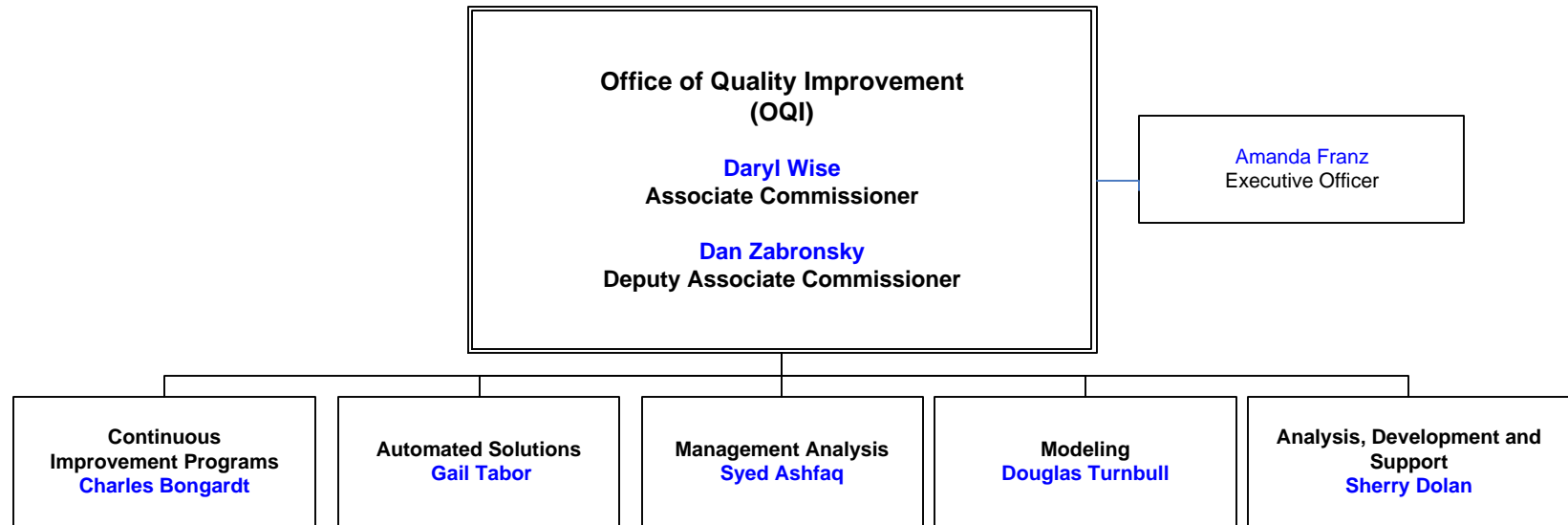
**James Spencer**  
Director



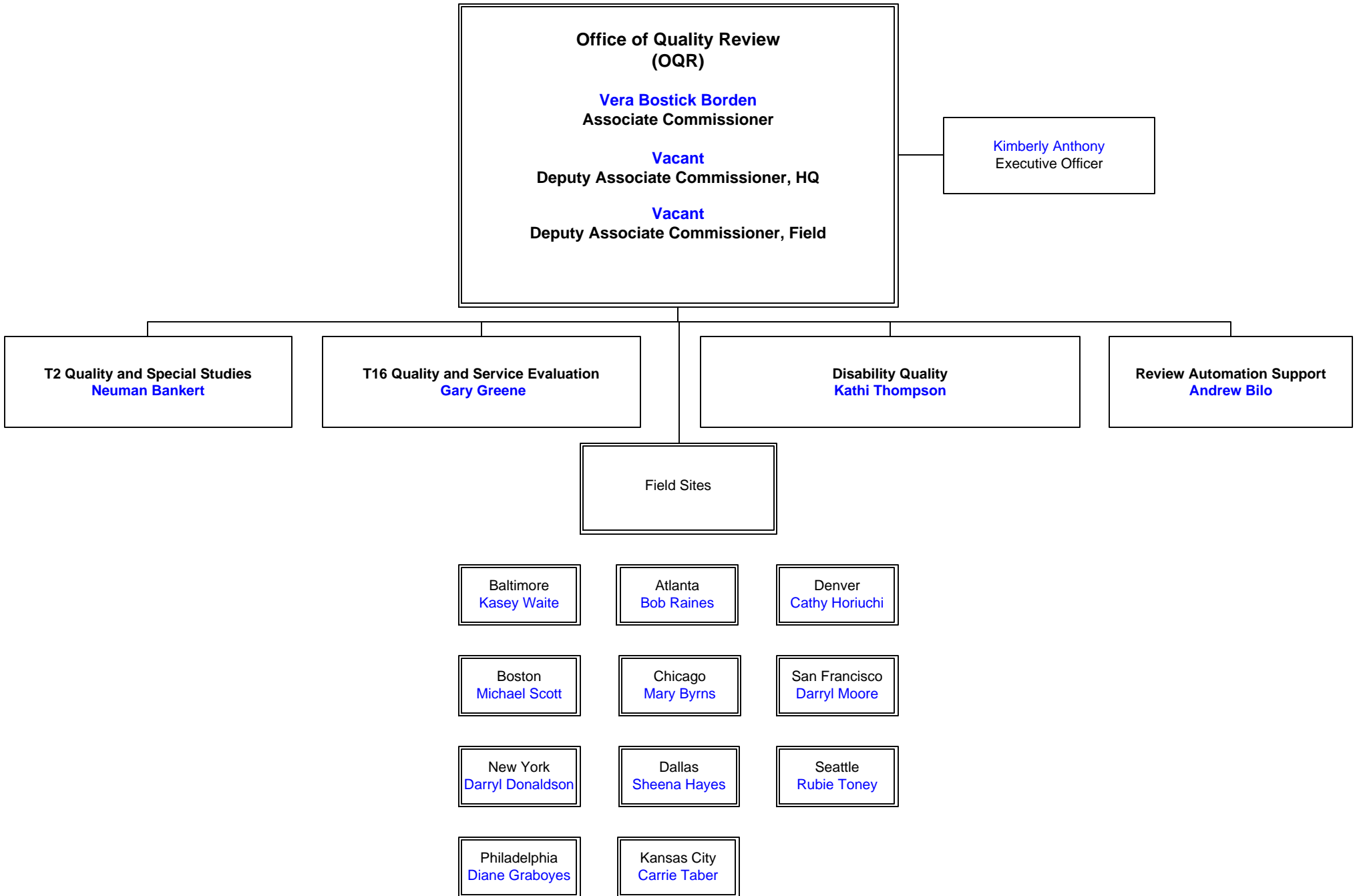


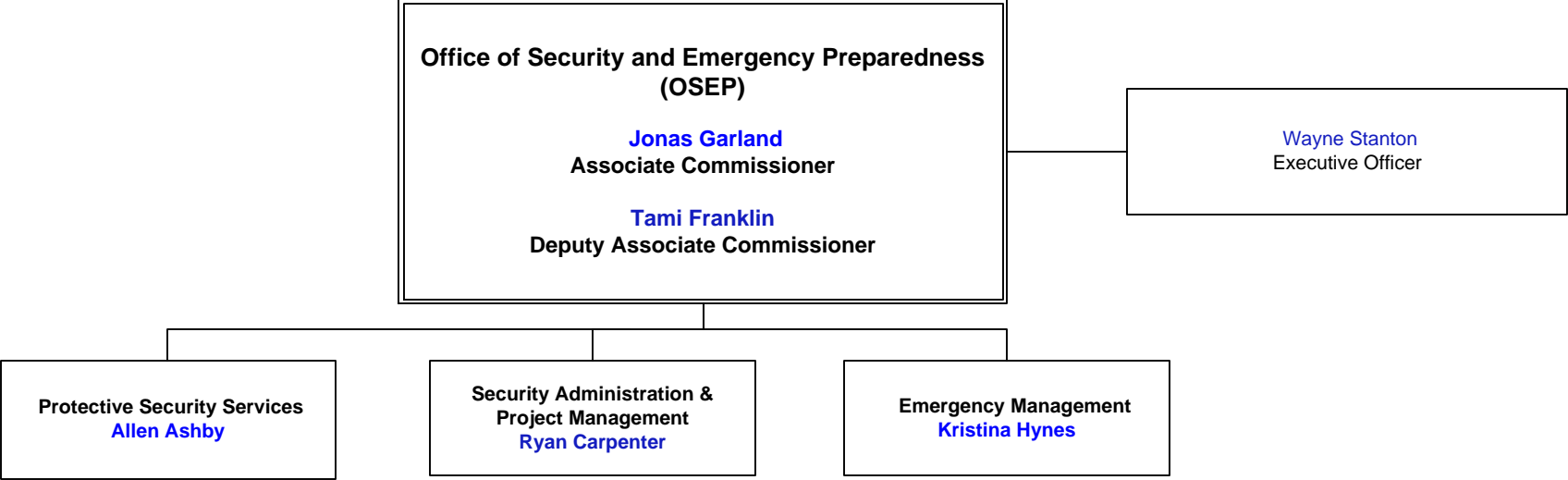












## **Data Analytics in Disability Adjudication**

### **Prepared by the Office of Adjudication and Review**

The Appeals Council has used a panoply of data analytics and computer analysis techniques to supplement our subject matter expertise in investigating, isolating, and resolve issues in disability adjudication. For many years the data analytics used were largely descriptive of the main features of the collected data – numbers of cases processed, processing time averages, etc. In the last 10 years, the Council has branched into exploratory (finding unknown relationships in data), inferential (estimating characteristics from some data and applying it more broadly to a larger population), causal (determining how a change in one variable relates to changes in others) and predictive analytics (using historical information to predict future events). The Council also has actively participated in building a variety of tools to assist adjudicators in case processing. Most recently, the Council has begun exploring machine learning techniques.

The specific technique used to identify or resolve a problem in adjudication is dependent on the type of issues involved. The techniques are selected from what might be described as a continuum of math and computer analysis techniques that range from summarization of information to machine learning. More specifically, we have used algebraic functions, multivariable calculus, descriptive and inferential statistics, as well as supervised and unsupervised machine learning. The techniques we use are dependent upon the types of problems we are attempting to solve. We typically use SAS, R, Matlab, and/or Excel, and our staff has done some computer programming in Python and JavaScript in support of our natural language processing efforts. We also have had good success in visualizing our results. Our subject matter expertise has enabled us to use the analytical results to improve management of the program, training of the staff, and development of analytical tools, and has helped inform policy construction.

Several data analytics efforts currently underway hold some promise for assisting with the hearings workload. Council staff is working with the Analytics Center for Excellence (ACE) to develop national and regional scheduling models to overcome problems with local hearing scheduling. The Council is undertaking a naïve Bayes analysis to score pending hearing level cases on the basis of complexity, which perhaps can be used to identify cases for fast-track processing. The Council is working with the ACE and the Office of Research, Evaluation and Statistics (ORES) on a Bayesian univariate probit analysis of the hearing workload to identify cases that can be paid without a hearing. The Council is also analyzing the regulation basis codes of the hearing workload to identify cases that were determined in a non-policy compliant

**Transition Team Member Document--Non-Public Information. This document may be disclosed to Authorized Transition Team Members only.**

manner at the initial and reconsideration levels so those cases can be informally remanded for policy compliant determinations. The Council also has a developed natural language processing and machine learning powered tool to assist in the analysis of the policy compliance of hearing decisions, and has worked with ORES to identify cases for selective sampling review based on specific known types of policy non-compliant decisions in order to take corrective actions in those cases. Additionally, the Council has tested a Bayesian multivariate probit analysis shown capable of identifying clusters of cases with similar characteristics. This technology enabled differential case management at the Council, and had the effect of reducing processing time and improving quality. A new analysis of the current workload will be conducted upon completion of the Bayesian univariate probit analysis of the hearing workload. Finally, the Council is well positioned to develop a Bayesian belief network, that ultimately could facilitate machine learning, natural language processing, and likely more sophisticated artificial intelligence applications having the potential to read and analyze the medical evidence, which would greatly speed case processing while improving quality and reducing costs.



# Cyber Security Critical Priorities



## 1. Identity Management (IdM)

### Ecosystem

Unify multiple discrete IdM initiatives and activities to enable desired security and business outcomes



## 2. Federal Cyber Marathon

Become the Exemplary Model for FISMA, FITARA, Federal Cyber Strategy, President's Management Council, Cross Agency Priority goals



## 3. Policy Ecosystem & Security One Stop

Comprehensive Policy development and IT Security Services to our customers



## 4. IT Modernization

Enable Business IT initiatives, e.g. cloud, big data, data analytics, via security assessments, authorizations, and services



## 5. Cyber Defense Operations Center (CDOC)

State-of-the-art continuous monitoring, intrusion detection, vulnerability assessments and incident response



## 6. Security Integrity Center (SIC)

Process Security Operational Workloads, to ensure highest standards of data security using advanced technologies and capabilities



## 7. Cyber Workforce Framework

Attract, Engage, Retain and Develop the Best People

## 8. Cyber Academy

Optimize Education and Training of Our Cybersecurity Staff for Multiple Disciplines

## **Information on Sampling and Response Rates for Satisfaction Surveys**

### **Online Surveys**

The sampling rate for the online surveys varies with the eService. High-volume services have lower sampling rates (e.g., main site is at 5 percent, mySSA is at 15 percent, and iClaim is at 25 percent). Lower volume services are sampled at a higher rate (e.g., “Extra Help” Medicare Part D Subsidy is at 100 percent, Business Services Online is at 50 percent).

Response rates are typically in the mid-70 percent range, with FY 2016 being between the low of 67 percent (iAppeals) to a high of 79 percent (“Extra Help”).

### **800 Number Caller Survey**

We attempted to reach a random sample of 4,000 callers who contacted the national 800 number during a 4-week period in March 2016. We conducted the survey by telephone with 1,408 customers representing a 41 percent response rate after adjustment of the initial sample size to 3,439 based on elimination of “out of scope” calls.<sup>1</sup>

### **Field Office Caller Survey**

We attempted to reach a random sample of 4,000 callers who contacted one of 110 randomly selected FOs during a 4-week period in April 2016. We conducted the survey by telephone with 1,185 customers representing a 37 percent response rate after adjustment of the initial sample size to 3,217 based on elimination of “out of scope” calls.

### **Field and Hearing Office Visitor Survey**

We attempted to reach a random sample of 5,890 customers who visited 1 of 52 FOs or 13 HOs (both randomly selected each year) during a 4-week period from late October through mid-November 2015. We conducted the survey by mail with 1,967 customers representing a 37 percent response rate after adjustment of the initial sample size to 5,371 based on elimination of “out of scope” calls.

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<sup>1</sup> “Out of scope” calls are mainly those originating from business or public telephones (where it is generally impossible to identify the person who made the call) and calls from nonworking numbers. Other “out of scope” calls include those made by callers who were unable to participate due to an impairment, language barrier, or permanent unavailability (death, in jail, hospitalized, etc.), numbers blocked by caller ID, telephone numbers belonging to facsimile machines, and calls that were made by mistake.

## **Social Security Card Center Survey**

We attempted to reach a random sample of 5,000 customers who visited one of the SSCCs during a 4-week period in March and April 2016. We conducted the survey by mail with 1,003 customers representing a 21 percent response rate after adjustment of the initial sample size to 4,798 based on elimination of “out of scope” calls.

## **DCO (Non-Headquarters) Components and Facilities**

### **Regional Offices (RO)**

The Office of the Regional Commissioner (ORC) serves as the principal SSA component in each of SSA's ten regions. Each ORC ensures effective SSA interaction with other Federal and local government agencies, State welfare agencies, State Disability Determination Services (DDS) and regional and local organizations. The ORC also issues supplementary operating policies and procedures for SSA's programs that target their specific regional needs. The ORC directs a region-wide network of Area Director Offices (ADO), Field Offices (FO), teleservice centers (TSC) and, in each of the six regions where present, a Program Service Center (PSC). It provides overall management direction for the provision of personnel services and administrative support to SSA regional components and implements a regional SSA public affairs program.

### **Area Director's Offices (ADO)**

Area Directors ensure FO managers are carrying out their assigned responsibilities fully and effectively and provide support for sensitive issues. The office ensures sound working relationships are established and maintained between field offices and many entities, such as DDSs, large employers, unions, medical associations and organizations, Federal, State, and local agencies, and major information media. The ADO facilitates the administration of programs to obtain the advantages of coordinated, area-wide effort in such fields as public affairs, community relations, recruiting, training, career development, equal opportunity and parallel functions. There are 51 Area Offices throughout the nation.

### **Field Offices (FO) – Primary Customer: Walk-in Visitors**

Field offices are geographically located to provide citizen's access to in-person, face-to-face Social Security services. Technicians in each SSA FO are trained to handle the wide scope of SSA responsibilities. These may include: providing general information on all the programs SSA administers; providing speakers for informational events; serving those who wish to file for retirement, survivor, disability, or Medicare benefits; providing assistance to resolve issues involving address or bank changes, lost checks, and applying for or replacing Social Security number cards. The FO also offers citizens the opportunity to complete business via local telephone service, Video Service Delivery for transacting business with other SSA entities and ability to use a Self-Help computer to complete SSA business. There are approximately 1200 FOs throughout the nation.



**Card Centers – Primary Customer: Walk-in Visitors**

Card centers are unique SSA FOs designed for one exclusive purpose – receive and process applications for Social Security numbers (i.e., Enumeration) and replacement cards. Card centers are located in metropolitan areas with high volume demand for Social Security card processing requests. We have 14 card centers in the following areas: several cities in California and New York; Phoenix, AZ; Orlando, FL; Minneapolis, MN; Las Vegas, NV; and Philadelphia, PA.

**Workload Support Units (WSU) – Primary Customer – Internet User**

Since the inception of iClaim (filing a claim online) in 2000, we have seen the public's service channel preferences continue to evolve to include online service as the faster and more convenient service channel. In support of that shift and expectations that trend will continue, our Workload Support Units (WSU) process work generated through the internet – just as a field office, but virtually – and perform other work that does not require face-to-face contact, increasing customer convenience and reducing FO traffic. We have 16 WSUs nationally.

**Teleservice Center (TSC) Primary Customer – Callers**

The Teleservice Center (TSC) is the primary public contact point for most persons who call SSA via the nationwide "800" telephone number (1-800-SSA-1213). Telephone technicians assist the public when they call our 800 number to obtain information, schedule appointments, or resolve issues with benefits. These employees assist the public by answering a wide variety of questions, conducting interviews, investigating situations, and resolving problems.

TSCs are national network, linked together on SSA's 800 number network, and calls are routed to different locations at different times of the day, or different days of the week, depending on call volumes and available resources. SSA's 800 number network is a very complex and sophisticated system and handles millions of calls every year. There are 26 TSCs located throughout the United States and in Puerto Rico.

**Processing Center Operations (PCO)**

Processing Center Operations (PCO) is comprised of eight organizations: six Program Service Centers (PSC), the Office of Disability Operations (ODO) and the Office of Earnings and International Operations (OEIO). PCO is a centralized organization with a complex structure and mission that touches a wide-range of service objectives. Multiple organizational components, comprised of well over a hundred positions, process the most complex workloads in the Agency for

approximately 11-12% of SSA beneficiaries, including claims, appeals, attorney fee payments, debt collection, evaluation of medical/vocational evidence, records maintenance, continuing eligibility, inquiries, remittance and accounting functions. In addition, PCO provides support to callers contacting the National 800 Number and for the Agency's online and electronic services.

### **Office of Central Operations (OCO)**

In addition to serving as the lead component for OCO and OEIO, subcomponents within the OCO organization maintain records of workers' earnings, furnish earnings statements, resolve individual and employer earnings problems, service domestic claims, and handle foreign claims around the globe.

Other components within the jurisdiction of OEIO include the Foreign Benefit Units (FBU). The different laws, customs, languages and conditions abroad, together with the difficulties that can arise in dealing with claimants and beneficiaries abroad by mail, often make it difficult to administer the Social Security program effectively outside the U.S. SSA customers who live outside the United States are serviced by Department of State (DOS) personnel located in US Embassies, Consulate Generals and Consulates.

OEIO utilizes these Foreign Service Posts (FSP) to assist with our business, including taking and developing claims. FSP employees are nationals of the host country and are called Foreign Service Nationals (FSN). FSN positions function like standard SSA Field Office (FO) service, claims and field representatives. OIO can structure requests for assistance to these FSPs in the same way as a developmental request to any SSA FO. However, because the FSNs do not have SSA adjudicative authority, they must send completed claims packages to OIO for review and final adjudicative action.

### **State DDS (DDS)**

The State Disability Determination Services (DDS) are responsible for the development and evaluation of medical and vocational documentation for Social Security and Supplemental Security Income claims, leading to a determination of whether or not an individual is disabled. These determinations may include consideration of the individual's age, education, and past work experience. Determinations involving vocational factors consider the availability of jobs in the national economy. The DDS is 100% federally funded by the Social Security Administration.

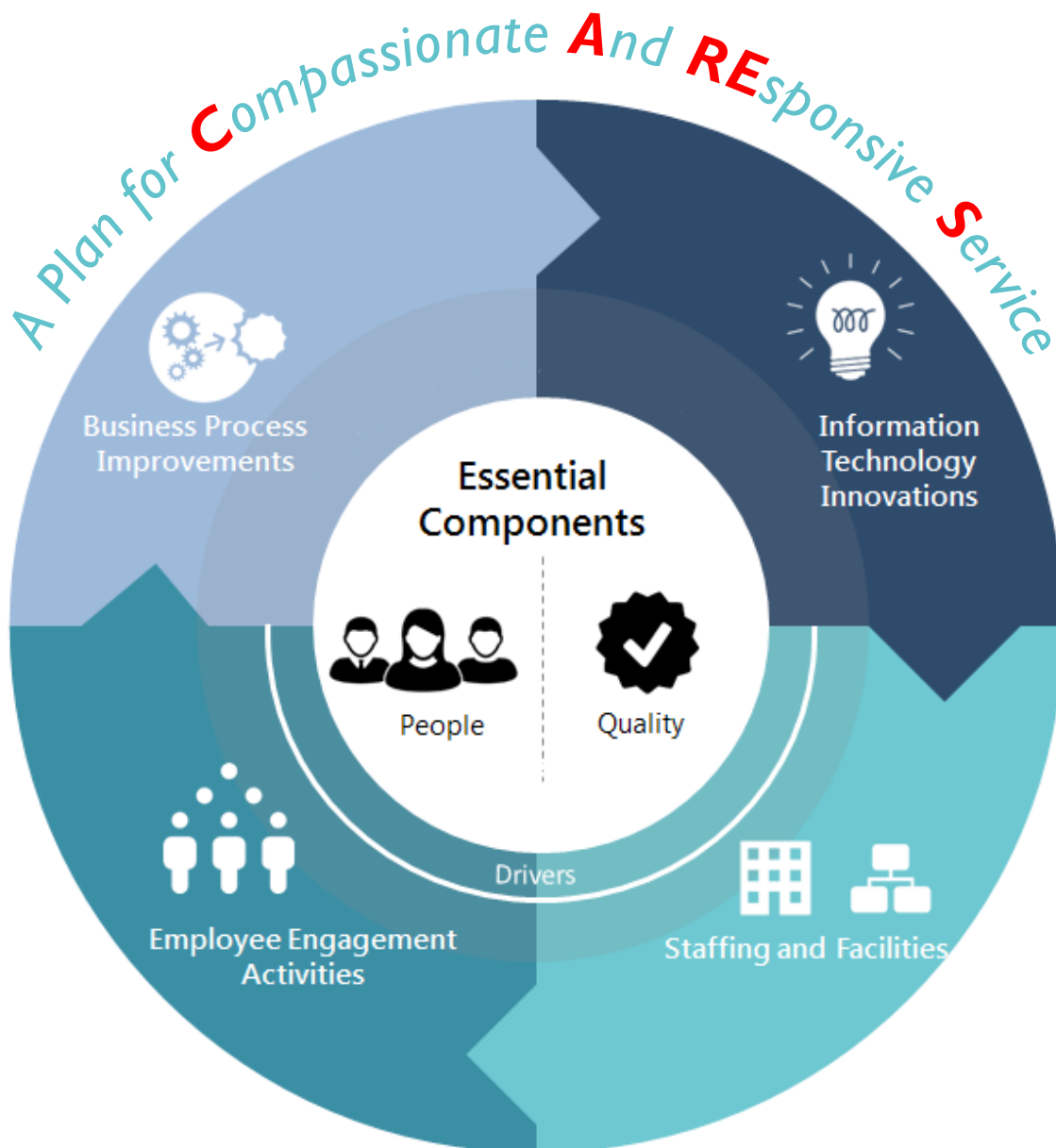
The overall objective of the DDS is to provide accurate, timely, and cost-effective disability determinations in accordance with Title II and Title XVI of the Social Security Act to disabled citizens while facing challenges that include attrition and periods of limited or no hiring authority.

## **Congressional Proposal on the Treasury Offset Program (TOP)**

This report is publically available on our website:

[https://www.ssa.gov/OACT/solvency/VBuchanan\\_20150616.pdf](https://www.ssa.gov/OACT/solvency/VBuchanan_20150616.pdf)

# Leading the Hearings and Appeals Process into the Future



# Leading the Hearings and Appeals Process into the Future: A Plan for **C**ompassionate **A**nd **R**esponsive **S**ervice (CARES)

## Executive Summary

The Social Security Administration (SSA) is facing a significant public service crisis in our hearings and appeals process. At present, and for the first time in our history, more than one million people are waiting for a hearing decision. The situation is urgent. Our ability to decrease the number of hearings pending, reduce the average wait time for a hearing, and significantly improve our service to these claimants requires adequate and sustained funding. In addition to the necessary funding, we are committed to continue to use data analysis, to listen to our employees and partners, and most importantly, to remain dedicated to providing a high quality, modern and timely disability appeals process now and into the future.

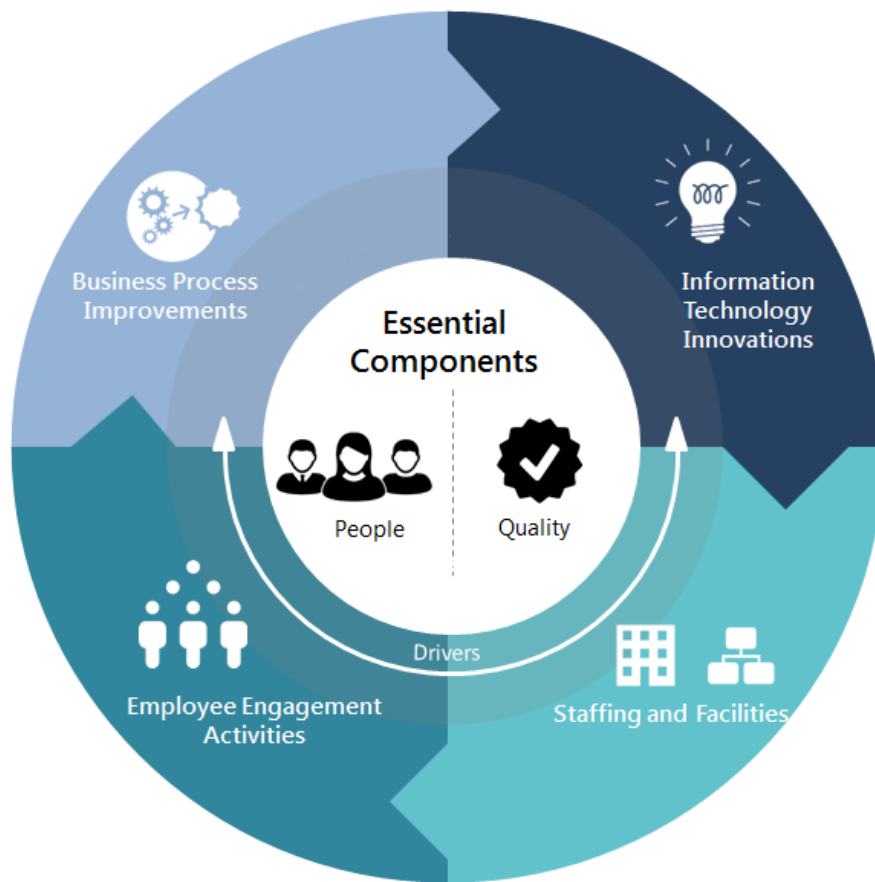
These challenges require both immediate tactical initiatives to address the over one million cases pending a hearing, and initiatives to ensure the hearings and appeals process is efficient, effective, and sustainable. The CARES plan outlines our current comprehensive and multi-layered approach to deal with the immediate crisis of the growing number of hearings pending and increasing wait times. It will also help to serve as a foundation to explore potential future initiatives, as we continue our efforts to identify ways in which we can better serve our customers.

We have built our plan on two essential components: **people and quality**—engaged, well-trained people providing quality service. We have also identified several broad categories of drivers that will help our employees provide quality service to the people who need us most. These drivers include:

- ▶ [Business Process Improvements](#);
- ▶ [Information Technology Innovations](#);
- ▶ [Staffing and Facilities](#); and
- ▶ [Employee Engagement Activities](#).

We are pursuing a number of innovations, new or enhanced practices, and quality initiatives to address our critical priority. We believe that we can combine our current plans with potential future initiatives to transform our hearings and appeals process, so we are well positioned to better serve the American public for years to come.

We have outlined a myriad of tactically important steps we can take, right now, to address our service crisis. However, we need adequate and sustained funding to execute the CARES plan. We also commit to an ongoing search for the ways in which we can serve our customers better. We will continue to use data analysis to inform, listen to our employees and partners, and most importantly, remain vigilant in our goal to serve. In our pursuit to meet the needs of the more than one million people waiting, we must consider every constructive avenue for change.



### A History of Hearing Pending Levels and Wait Times

Our disability programs are complex, resource-intensive, and require robust administration. Disability claims and appeals require our employees to understand our rules and regulations, analyze the merits of each case, and make difficult decisions. While we automate where we can, the disability programs we administer require a sufficient number of well-trained, engaged employees to assist the American public with their disability appeals.

Over the history of our disability programs, there have been many initiatives to reform or improve the hearings and appeals process. However, despite any streamlining we have achieved, we have been continuously affected by external influences that slowed our hearings process. These external influences have been instrumental in increasing the number of hearings pending as well as a rise in wait times for our customers.

Administrative Law Judges (ALJs) are our primary decision makers in the hearings process. From 1999 through 2008, the Office of Personnel Management's (OPM) ALJ registry was not updated because of an adverse ruling in litigation commonly referred to as the Azdell litigation. However, due to severe staffing shortfalls in the early 2000s, SSA received temporary authority to hire an additional 126 ALJs from the old register. While we hired this limited number of judges, it unfortunately did not keep pace with the growing number of pending cases and the attrition of approximately 100 ALJs each year, who leave primarily to retirement. The inability to hire ALJs, the number of retiring ALJs, and several years of insufficient funding caused pending levels and wait times to rise dramatically. As we

look at resolving the current crisis of over one million Americans waiting for their hearing, it is imperative that we not only replace ALJ attrition losses, but also increase the number of ALJs to reduce the number of hearings pending.

In 2007, our pending level rose to 750,000 hearings, nearly triple the number pending in 2000. The average processing time almost doubled to 500 days between 2000 and 2007. As a result, we developed an aggressive plan to reduce the growing hearings backlog by 2013. At the same time, the economy entered a recession, which contributed to a significant increase in disability applications. This increase in applications exacerbated the number of hearings pending and wait times. We worked diligently to address the growing backlog by shifting funding from our other priorities to the hearings and appeals workloads and successfully implementing many important initiatives to improve service, including:

- Completing implementation of the electronic folder eliminating our paper-intensive disability process;
- Hiring additional ALJs;
- Expanding our national video-conferencing network, allowing us to hold more hearings via video;
- Establishing National Hearing Centers, which use video technology to hold hearings to assist backlogged offices;
- Opening National Case Assistance Centers to help offices prepare cases and write hearing decisions;
- Creating a national standardized electronic business process;
- Adopting the aged case initiative and enforcing the first-in/first-out approach to reduce the number of aged cases; and
- Providing program training to ALJs and other hearing office staff through easily accessible computer systems on a large range of topics.

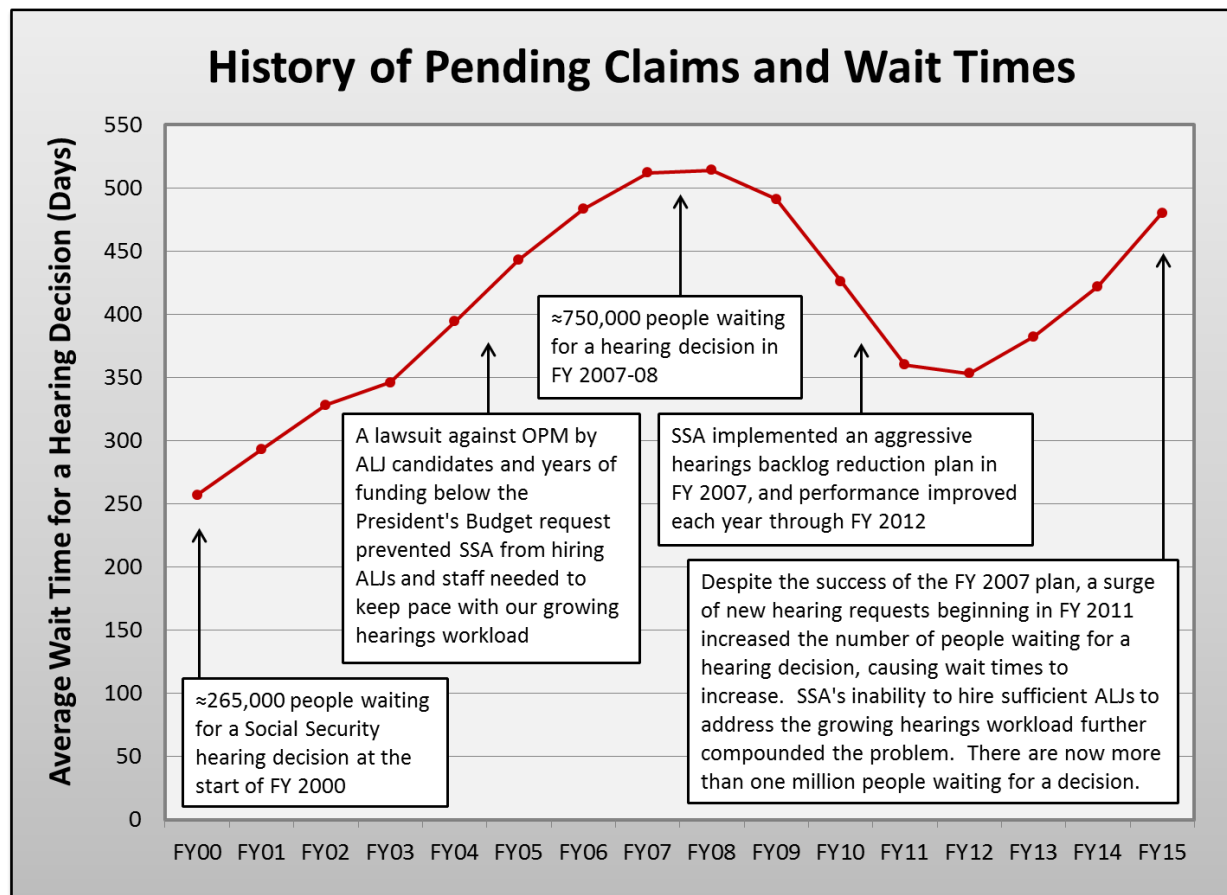
Although we made measurable progress through 2011 toward eliminating the hearings backlog, severe budget cuts adversely affected our progress. Decreased budget allocations drove our difficult decision to curtail plans to open additional new hearing offices that would have increased adjudicatory capacity. We also continued to face difficulty in hiring a sufficient number of qualified ALJs. As a result, wait times for a disability hearing and the number of pending hearings began to rise again. Now, we are mindful of these lessons learned and the ongoing impact of changes in our operational landscape.

### **Defining the Numbers: Cases Pending and Wait Times**

Although the terms ‘pending’ and ‘backlog’ have often been used interchangeably to describe our appeals crisis, they are not the same. We can express the ‘backlog’ as a mathematical equation. The backlog, which constitutes only a part of the total pending, is the extent to which the number of pending cases prevents us from meeting our timeliness expectations. We define the hearings backlog as the number of pending cases that push the average wait time over 270 days. Currently, we have over one million people awaiting a hearing, which is about twice as many as our business process and staffing levels allow us to handle.

We base our 270-day timeframe on our statutory and regulatory timeframes for our hearings process, and the amount of time necessary for our employees to complete each stage of the process. We believe

that we will be successful in providing timely, quality hearing decisions and we will consider that we have been successful with our plan once we have met our average national processing time of 270 days.



In the past, we provided the number of pending cases to inform decision makers and the public as to how efficiently the program was working. However, this measure is not necessarily meaningful to our claimants who are likely more concerned about how long they will wait for a hearing than how many people are waiting. Using average wait time, also referred to as processing time, is a better, meaningful service metric that will help us more readily define success by providing a tangible measure for our customers. A similar analogy to this expectation is individuals waiting in line at a store with building checkout lines. People begin to get upset if there are not enough cashiers on the registers. The real concern is not how many other people are waiting but how quickly the line is moving and how long it will take to be served.

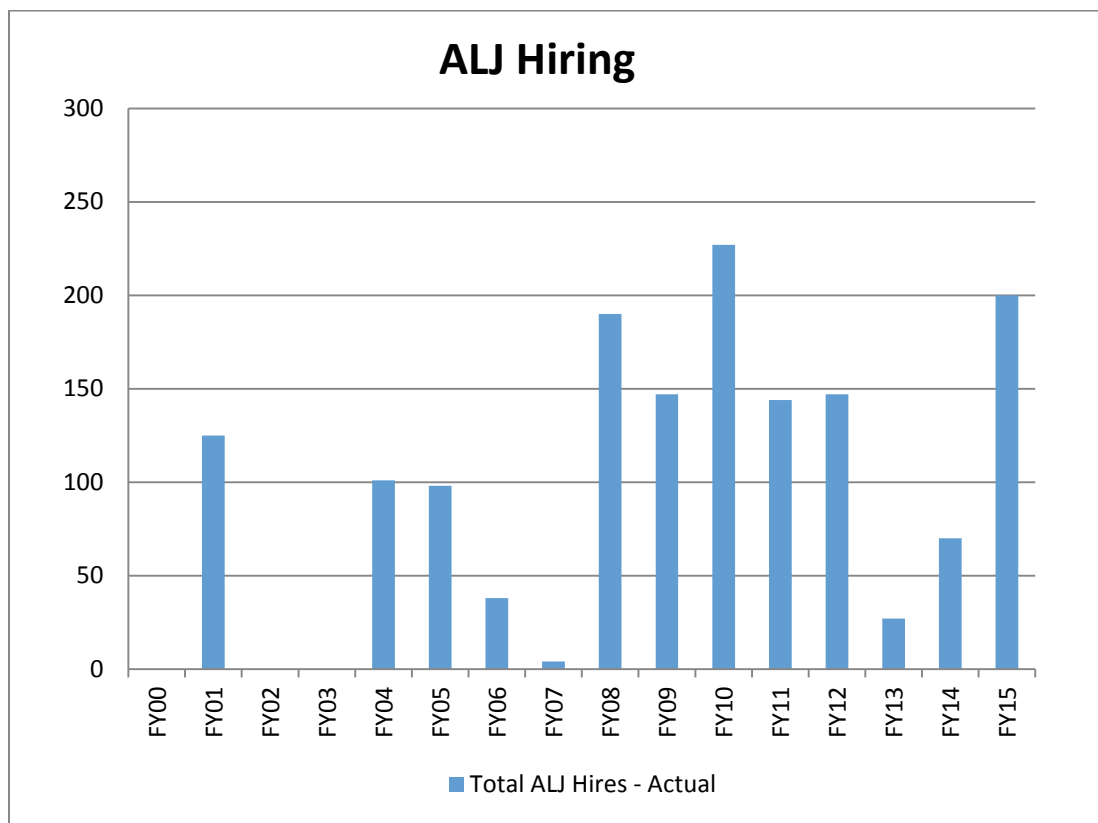


## Definition of Success

When the national average waiting time for a hearing decision is 270 days, we will consider the portion of our pending hearings that are considered a ‘backlog’ eliminated. We plan to achieve this goal by the end of fiscal year (FY) 2020, but the success of this plan will require adequate and sustained funding as well as OPM’s ability to provide enough qualified ALJs timely.

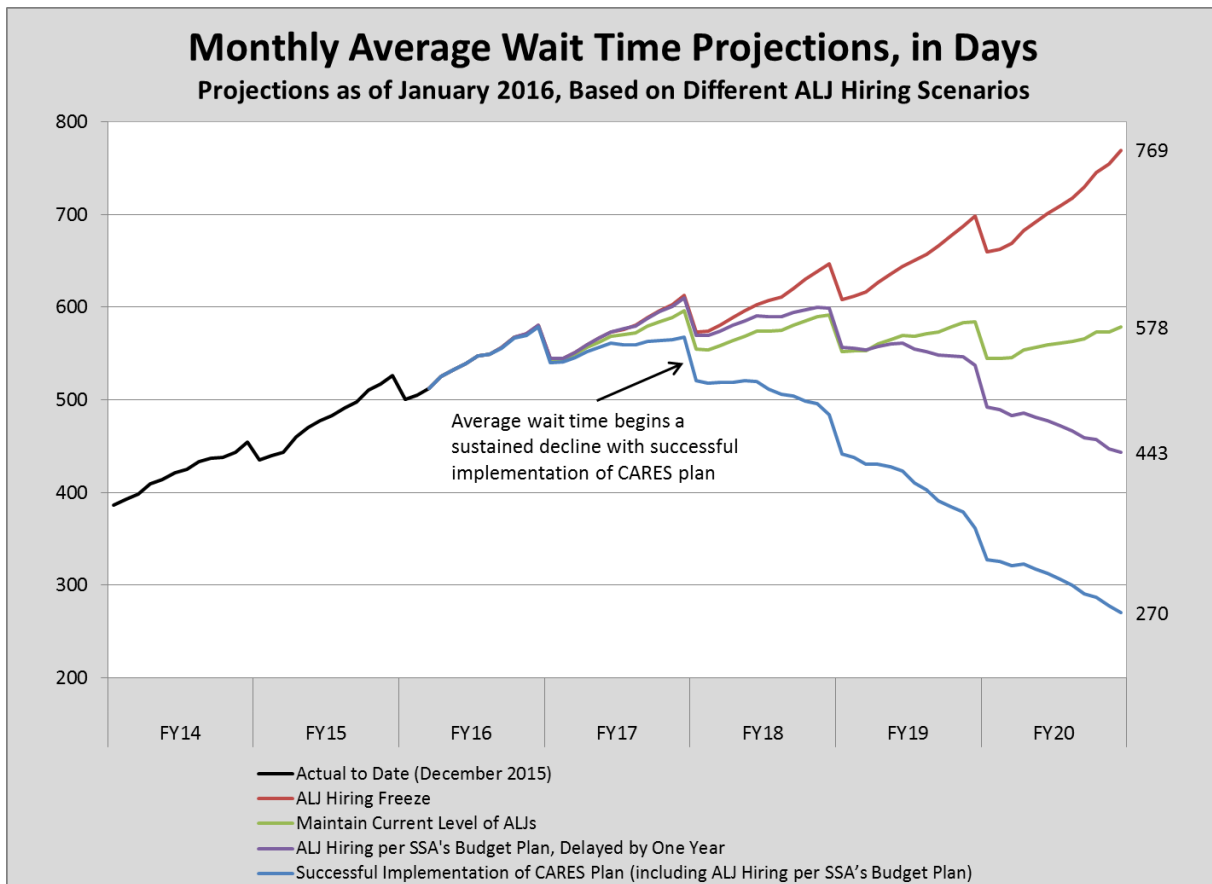
Our plan requires sustained, adequate funding in the future to expand the number of ALJs and increase the number of hearings we complete. In order to meet our hiring goals, we are working in close collaboration with OPM to provide a larger and continuously refreshed register of qualified ALJ candidates. We also need an immediate re-announcement of the ALJ examination. If we meet our hiring goals, we will increase our hearing decisions in FY 2017 to approximately 784,100, nearly 18 percent more than our FY 2015 levels. If we are successful with these hiring plans, we believe that by FY 2018, our ALJ corps will be at the appropriate levels to address the continued growth in pending hearings and wait times for a hearing.

Our projections show that we will need to hire at least 250 new ALJs in FY 2016, FY 2017 and FY 2018 to reach an average wait time of 270 days by FY 2020. This need to hire ALJs also requires hiring support staff for each ALJ. Currently, we have approximately 4.5 support staff for every ALJ. We have been committed to increasing the number of qualified ALJs for the past several years, but with limited and sporadic success, as illustrated in the chart below.

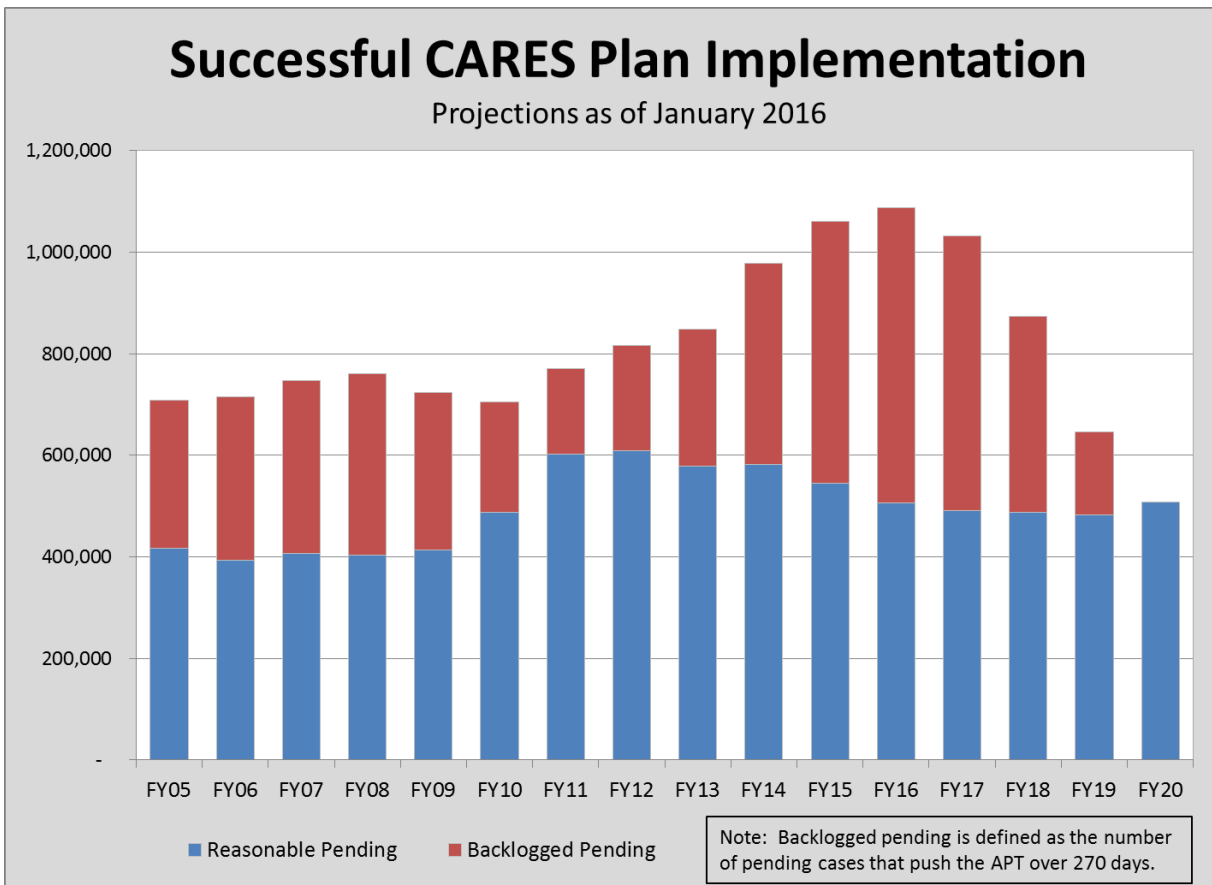


We believe the Bipartisan Budget Act of 2015 will help to address certain delays we have experienced when seeking a new register of ALJ candidates, but we will continue to review and study additional ways to augment our capacity and our efficiency.

As shown below, having sufficient ALJs has a direct impact on the time claimants wait for a hearing decision. Sustained funding and the ability to hire sufficient ALJs and support staff will allow us to achieve an average wait time of 270 days by the end of FY 2020.



We have learned from our history of pending hearings and wait times that sufficient case processing is directly dependent on having a sufficient number of qualified ALJs. However, as we think broadly about the future of our programs and our customers, we know that we cannot base a sustainable plan to reduce the number of pending hearings and wait times solely upon ALJ hiring ability. Through our CARES plan, and with sustained and adequate funding and support from OPM, we expect to begin to eliminate the backlog in FY 2017 and to eliminate it by FY 2020. We also expect that we will reduce the average wait time for a decision from the over 500 days currently to no more than 270 days in FY 2020, and we expect to cut the number of pending cases in half.



### Definition of Success for the Appeals Council

Our CARES plan is a comprehensive look at ODAR workloads including the Appeals Council (AC) in the Office of Appellate Operations (OAO), which among other activities is responsible for the final level of administrative review. The AC reviews ALJ decisions and dismissals and handles certain Federal court actions. There is a direct correlation between the number of cases handled and types of action taken by the hearing offices and AC workload levels. OAO anticipates a significant rise in the number of requests for review it receives from the hearing level as more ALJs are hired, trained, and issue dispositions.

The longer-term goal is to process requests for review in an average of 180 days. Staffing is the single factor that most strongly affects OAO's success in delivering timely service and continuing its important quality work. However, as we implement this plan, we are incorporating other measures we can take to assist in reducing wait times and number of pending cases at the hearings and the appeals levels.

## The CARES Plan

We built our CARES plan around two interdependent components: **people and quality**—engaged, well-trained people providing quality service. We consider the CARES plan a living document, which we will change as we gain more experience with each initiative, begin new initiatives, and adapt to the changes in our operational environment.

### *People*

Our employees have a strong commitment to public service. They understand that when they took the oath to become Federal employees, they accepted the responsibility to serve the American public. Our employees have a long tradition of serving our customers and a firm understanding that *who we serve is why we serve*. As we work to address the million people waiting for a hearing decision, it is important to note that our plan requires an emphasis on the people – our employees – who provide that service every day. Thus, our plan also includes initiatives that will help empower and engage our employees, provide them with improved tools to do their jobs, and foster an environment where they are best equipped to provide compassionate and responsive service.

*Who we serve is  
why we serve.*

### *Quality*

We are part of a rich organization whose “signature” is one of compassion and dignity in responsive service. Inherent in compassionate and responsive service to the American people is quality. We define high-quality decisions as policy-compliant and legally sufficient decisions. We have always had to operate in a high production environment, and the hearings process is no exception. Regardless of whether they ultimately receive benefits, the millions of people who apply for our benefits deserve timely decisions that are high quality. Quick decisions without quality or quality decisions without timeliness are not compassionate or responsive service.

### *The Importance of Investing in Quality*

Quality requires an investment, but that investment pays off. Employees who do quality assurance work can prevent additional work by limiting appeals and remands – allowing SSA to process the case once, not multiple times. ODAR quality reviews identify trends that may require policy clarifications or targeted training and feedback.

For example, beginning in 2011, we limited the number of cases that could be assigned to an ALJ. That limit helps ensure that ALJs take the time to follow SSA policy and procedures in their decisions. In addition, we provide desktop training and feedback tools to ODAR employees and ALJs, such as the *How MI Doing* tool. While there are administrative costs for expanded quality measures, many of our employees appreciate the convenience of this added assistance.

## *Tactical and Strategic Initiatives*

Our plan includes several broad categories of drivers that will propel our efforts to address the service crisis at the hearings and appeals levels. These include:

- ▶ [Business Process Improvements](#);
- ▶ [Information Technology Innovations](#);
- ▶ [Staffing and Facilities](#); and
- ▶ [Employee Engagement Activities](#).

### **Business Process Improvements**

We continue to look for opportunities to make the hearings and appeals process more efficient while ensuring quality decisions. Part of our strategy for moving forward includes frequent benchmarking with other agencies to both share information about our strategies and to learn about successful strategies they have used. We are also looking at ways to streamline our processes, eliminate duplication, and efficiently utilize our limited resources to provide better and faster service to the public.

In this section, we provide brief descriptions of our tactical initiatives and actionable strategies. Please note that this list of initiatives is not exhaustive – potential new initiatives may be added, and existing initiatives may be modified or removed depending on their success.

***Pre-Hearing Triage Initiatives:*** This set of initiatives aims to increase overall hearings adjudication and disposition capacity through new and innovative techniques and providing additional adjudication resources. Under this category, we plan to:

- ✓ Increase our use of Senior Attorneys where appropriate;
- ✓ Expand the use of pre-hearing conferences that explain the hearings process to and better prepare unrepresented claimants for their hearing;
- ✓ Test the use of predictive modeling in both hearing offices and the AC levels;
- ✓ Test the use of screening and data analytics tools (e.g. SmartMands); and
- ✓ Provide additional staff time and assistance to heavily impacted or backlogged hearings offices.

***Case Readiness Initiatives:*** Through this set of initiatives, we will improve the support provided to ALJs in case development and preparation. One key effort is our **1,000 Plus Page Initiative**, in which staff will review and prepare cases with 1,000 pages or more of evidence prior to the ALJ review and hearing.

***Optimized Hearing Office and Case Assistance Center Models:*** Under this strategy, we will address support staff efficiency by strengthening and streamlining hearing office and centralized case assistance business process models. Through these efforts, we plan to enhance information sharing among our hearing offices, national hearing centers, and our centralized case assistance centers. For example, in FY 2016, we will build and foster a more collaborative virtual working environment to support interaction between ALJs and geographically dispersed support staff. We will pilot the use of collaborative technologies to facilitate a virtual team model through a concept called the **Virtual Hallway**.

***Proactive Quality:*** In addition to the pre-effectuation and post-effectuation quality reviews that the AC conducts, we are testing an inline quality review process at the hearing level that promotes consistency and continuous improvement in case processing by ensuring: (1) case files are properly prepared; (2) cases are properly scheduled; (3) the record is adequately developed; and (4) a legally sufficient draft decision is prepared. Most importantly, our inline quality review initiative is designed to correct identified errors before a final decision is issued.

***Natural Language Processing Capabilities:*** Currently, the AC uses natural language processing (NLP) in its data analytics studies. NLP offers a way to extract select information from electronic disability records, converts unstructured information in text into structured or numerical data, and facilitates robust data analysis. The AC is testing the use of NLP to scan ALJ decisions for language that suggests a higher likelihood of an error so we can select and identify those cases for a pre-effectuation quality review. SSA is conducting a study with NIH researchers to explore automated ways to extract meaningful information from scanned images of medical records and identify duplicate documents.

## **Information Technology Innovations**

We designed our technology investments to provide faster, streamlined, and more efficient IT tools for our employees, external stakeholders, and the public. Specifically, any IT improvements we make must help to remove inefficiencies in our case processing systems, drive policy-compliance and consistency across offices, and/or provide self-service options that allow us to provide customer choice and redirect staff away from manual workloads. We will measure the success of any IT investment we make in the hearings and appeals process by the extent to which that investment helps to reduce the wait time for our customers and eliminate the number of backlogged cases.

Under this category of improvements, we plan to:

- ✓ Expand the use of video hearings in order to balance workloads and eliminate service inequity across the country;
- ✓ Provide online electronic folder access for medical and vocational expert contractors (MEs and VEs) to eliminate staff time to produce CD copies of case folders;
- ✓ Reduce the number of hearings level cases that turn into paper; and
- ✓ Develop an online Appeals Council (AC) Request for Review (iAppeals for Appeals Council) that will eliminate paper requests for review, reduce the potential for lost cases, and improve the efficiency of the AC's business process.

## **Staffing and Facilities**

### ***Staffing***

We are aggressively pursuing opportunities to increase our decision-making capacity. It is important to note that our plan depends on sufficient funding so we can hire a sufficient number of ALJs and support staff. As emphasized earlier, any significant setbacks in ALJ hiring will pose a serious challenge to reducing the number of pending hearings and wait times. We hope that with the recent passage of the Bipartisan Budget Act of 2015 and our close collaboration with OPM (our partner in the ALJ hiring process) we will have a sufficient quantity of qualified ALJ applicants across the country. We are also exploring ways to attract and recruit a greater number of prospective ALJ candidates

especially for harder-to-fill geographic locations. However, to make continual progress, we need a larger and continually updated list of qualified ALJ candidates and sufficient, sustained funding from Congress.

Concurrently, we are actively pursuing ways other organizations across SSA can help augment our adjudicative and non-adjudicative capacities to help with our growing appeals workloads. We realize that when we make the difficult decision to move work from one part of the agency to another, other important workloads are affected. To help address our current public service crisis, we plan to temporarily augment capacity by:

- ✓ Collaborating with the Office of Quality Review (OQR) who will assist ODAR in critical case processing activities; and
- ✓ Utilizing Appeals Council (AC) Administrative Appeals Judges (AAJs) to hold hearings and issue decisions on a subset of cases.

In the OAO that runs the AC, we will also focus on hiring appropriate staff and Administrative Appeals Judges (AAJs) to address the growing post-hearing appeals workloads and to reallocate current staff as necessary to help address the increased number of cases that will result from the increased decisions at the hearing level.

In addition to our focus on staffing, we are working to streamline the structure of work where it makes sense. For example, we recently realigned the Limited Income Subsidy Appeals Unit (SAU) from ODAR to the Office of Operations because of closer alignment with other Office of Operations workloads.

### ***Facilities***

We have a multipronged approach to better utilize our space, ensuring that we maintain focus on incorporating the staff we need into the space we currently have available. By increasing space options, we will provide greater access to hearings for claimants and reduce wait times.

We plan to:

- ✓ Repurpose vacant space that is already federally-owned or leased for the hearings operation;
- ✓ Make more efficient use of existing ODAR space; and
- ✓ Co-locate our hearing offices with field offices and continue to add “shared services” rooms in our field offices allowing claimants to participate in an ALJ hearing from the convenience of the local field office.

### **Employee Engagement Activities**

Increasing meaningful employee engagement is critical to our ability to serve the public and meet the demands of our growing workloads. A highly engaged workforce will increase innovation, quality, productivity, and performance.

We are using the results of the 2014 and 2015 Federal Employee Viewpoint Survey (FEVS) for ODAR employees and creating a plan of action to improve employee engagement.



Specifically, we plan to:

- ✓ Enhance communication and help build a shared set of goals across ODAR;
- ✓ Implement an internal ODAR development program, covering all positions and grade levels, in order to attract, retain, and develop employees for technical, management, and leadership positions; and
- ✓ Increase availability for telework under current collective bargaining agreements.

*I am always inspired by what our employees do every day – the amount of work that you do, the quality and accuracy of your work, and the compassion in which you deliver services. That is what makes our organization one of the best in government.*

*~ Acting Commissioner Carolyn Colvin*

### Other Long-Term Plans

We will continue to evaluate options and initiatives to improve service to our customers, as well as flexibilities or improvements in rulemaking. For example, in the past year we instituted new rules related to scheduling and appearing at hearings and the submission of evidence. We will continue to examine ways in which we can improve our service to provide a high quality, modern and timely disability appeals process.

**We're committed to new ways of doing business.**

### Conclusion

We have built our CARES plan around a set of two interdependent components—**people and quality**—and integrated those two components with a complementary set of tactical initiatives. Our plan builds on successful initiatives from past efforts and renews our commitment to finding new strategies to dramatically reduce wait times for the public and reduce the number of pending cases. However, this plan will not have a significant impact on the more than one million people waiting for a disability hearing decision without adequate and sustained funding – this is critical.

This plan offers a blueprint for steps we will take in the short-term but also lays out the path for evaluating potential future changes. With the unprecedented challenge of more than one million people waiting for a hearing decision, we cannot maintain the status quo.



# Office of Budget, Finance, Quality, and Management

## Mission

The Office of Budget, Finance, Quality and Management (BFQM) provides leadership on key agency programs and initiatives, including:

- Administration of a comprehensive financial program of budget policy, formulation and execution;
- Accounting policy and operations;
- Acquisition and grants program;
- Internal control program;
- Audit resolution and liaison;
- Agency anti-fraud initiatives;
- Quality review and business innovation;
- Agency-wide facilities, publications, and logistics management; and
- Physical Security, continuity of operations, and emergency preparedness.

The Deputy Commissioner for Budget, Finance, Quality, and Management provides support and guidance to the agency in numerous oversight roles, including:

- Chief Financial Officer;
- Chief Infrastructure Assurance Officer;
- Senior Procurement Executive;
- Senior Sustainability Officer;
- Senior Real Property Official;
- Senior Debt Management Official;
- Agency Environmental Executive;
- Agency Continuity Coordinator;
- Agency Management Control Officer;
- Designated Agency Safety and Health Official;
- Designated Official for Enterprise Risk Management;
- Program Manager for the Agency's Continuity of Government; and
- Designated Official for the Agency's Occupant Emergency Organization.

All SES Separations from FY 2012 - FY 2016						
Type of Separation	FY12	FY13	FY14	FY15	FY16	Total
Early Out Retirement	1	1				2
Regular (Optional) Retirement	17	7	11	13	10	58
Resignation		1	1	3	3	8
Transfer	2			3	2	7
<b>Total</b>	<b>20</b>	<b>9</b>	<b>12</b>	<b>19</b>	<b>15</b>	<b>75</b>

**Note:** Separation counts include all employees in Senior Executive Service (SES) positions. Includes Career SES, Limited Term Career SES and Non-Career Political Appointees.

Data Source: HRODS

Data as of Date: 12/14/16

Date Query Produced : 12/15/16

Query File Name: SES Separations FY12-16

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## **TREASURY OFFSET PROGRAM (TOP) STATUS DECEMBER 2016**

### **Background**

Before 2008, legislation permitted administrative offset under TOP only for non-tax debts 10 years or less delinquent. In 2008, however, the Food, Conservation, and Energy Act of 2008, Public Law 110-246, 122 Stat. 923 (2008) (also known as the “Farm Bill”), eliminated this statute of limitations. Subsequently, in 2009, the Department of the Treasury (the Treasury) amended its regulations to remove the time limitation for offset of tax and non-tax payments under TOP. We issued conforming regulations in October 2011. In June 2012, we began notifying individuals with debts 10 or more years delinquent that we would refer the debts to TOP, and we started referring eligible debts in September 2012.

### **Litigation**

In April 2014 and February 2015, two groups of plaintiffs filed separate lawsuits in Maryland and in the District of Columbia, respectively, challenging our use of TOP to recover delinquent debts 10 years old or older. The plaintiffs alleged they received no prior notice that the Treasury would offset their tax refunds to recover their delinquent title II and title XVI debts. They also alleged the Treasury offset their payments for debts for which they were not liable, and that our records were inadequate to prove they owed the debts.

In response to public concerns, we took immediate action to suspend referrals to TOP for debts 10 years or more delinquent, and initiated a review of our policies and procedures. In January 2015, we suspended offset of childhood debtors’ delinquent debt from TOP as we continued to explore policy options. Our review found we correctly applied the law and our regulations, policies, and procedures when we referred debt to TOP. Our Inspector General’s July 2015 audit report concluded the same.

The Maryland and District of Columbia courts dismissed the plaintiffs’ lawsuits in March 2016 because the plaintiffs’ claims were moot; i.e., the debts were administratively waived. The plaintiffs appealed these dismissals to the Court of Appeals for the Fourth Circuit and the Court of Appeals for the District of Columbia Circuit, respectively. The appeals remain pending.

### **Legislative Proposal**

We drafted a legislative proposal that would allow us discontinue using TOP for the debts of former childhood beneficiaries. The Office of Management and Budget recommended a proposal to forgive a defined group of debts 10 or more years delinquent and not use TOP for former childhood beneficiaries if we did not initiate collection action for 10 years. OMB’s legislative proposal is in the Fiscal Year 2017 President’s Budget. OMB also requested that SSA restart TOP immediately for former childhood beneficiaries not within the defined group.

### **Status**

On November 8, 2016, our Acting Commissioner determined that we should no longer use TOP for debts 10 years or more delinquent, and that, through a Federal Register notice, we should offer refunds to individuals whose 10-years-or-more delinquent debts were recovered through TOP.

Data

Debtors Currently Suspended from TOP Collection		
Description of Debtors	Number of Debtors	Value of Debt (In Millions)
10 or More Years Delinquent Title II as of June 2016	221,530	\$441.6
10 or More Years Delinquent Title XVI as of June 2016	83,311	\$230.7
Less Than 10 Year Delinquent Former Childhood Beneficiaries (BIC C's) as of October 2016	71,094	\$319.5

□

## Agency Review Team Agenda OMB Max Portal Document List

Day 1 – Tuesday, November 29, 2016			
Time	Topic	Presenter	OMB Max Portal Documents
12:00pm – 1:00pm	<ul style="list-style-type: none"> <li>Welcome and Introduction</li> <li>Logistics</li> <li>Virtual Presentation of Briefing Book</li> <li>Tour of Agency Review Team Space</li> </ul>	Office of the Commissioner Agency Transition Team Darlynda Bogle Joe Lopez Greg Pace Stacy Rodgers Roslyn Torella Christa Adle Nelisbeth Ball	<a href="#">Agency Briefing Book</a>
1:00pm – 1:30pm	Meeting with the Chief of Staff	Stacy Rodgers	No Materials Posted
1:30pm – 2:45pm	Welcome Meeting with Senior Executive Team	Deputy Commissioners (DC) and ACOSS Sr. Staff	No Materials Posted
2:45pm – 4:45pm	Meeting with: Office of Budget, Finance, Quality, and Management (BFQM)	Michelle King, DC Kate Hickman, Assistant Deputy Commissioner (ADC) Sean Brune, ADC Bonnie Kind Pat Perzan	<a href="#">DCBFQM Org Chart</a>  <a href="#">DCBFQM Functions and Mission</a>  <a href="#">DCBFQM Budget Update &amp; Background</a>  <a href="#">Disability Allowance Waterfall Chart (2013 Longitudinal Study)</a>
5:00pm – 6:00pm	Meeting with: Office of Legislation and Congressional Affairs (OLCA)	Judy Chessner, DC Royce Min, ADC	<a href="#">OLCA First 100 Days Leadership Issues</a>

Day 2 – Wednesday, November 30, 2016			
Time	Topic	Presenter	OMB Max Portal Documents
9:00am – 10:00am	Meeting with the Acting Commissioner of Social Security (ACOSS) Carolyn Colvin	ACOSS Carolyn Colvin	No Materials Posted
10:15am – 11:15am	Meeting with: Office of the Inspector General (OIG)	Gale Stone, Acting Inspector General Steve Schaeffer Kelly Bloyer Joseph Gangloff Michael Robinson Rona Lawson	No Materials Posted
11:15am – 12:15pm	PTT Conference Call	N/A	No Materials Posted
12:15pm – 1:15pm	Working Lunch Meeting with: Office of Communications (OCOMM)	Doug Walker, DC Jim Borland, ADC	<a href="#">OCOMM ART Presentation</a>
1:30pm – 2:30pm	Meeting with: Office of Operations (DCO)	Nancy Berryhill, DC Mary Horne, ADC Erik Jones, ADC	<a href="#">DCO Management Issues</a> <a href="#">DCO Enterprise Wide Issues</a> <a href="#">DCO Decision Making Process</a> <a href="#">DCO Org Chart</a> <a href="#">DCO Facilities</a> <a href="#">DCO Employee Position Descriptions</a>
2:45pm – 3:45pm	Meeting with: Office of the General Counsel (OGC)	Andy Liu, General Counsel Dan Callahan, Deputy General Counsel	<a href="#">OGC Overview</a> <a href="#">OGC Strategic Plan</a> <a href="#">Significant Litigation</a>
3:45pm - 4:45pm	Meeting with: Office of Disability Adjudication and Review (ODAR)	Donna Calvert, ADC Judge Pat Jonas	<a href="#">ODAR First 100 Days</a> <a href="#">CARES Plan</a>

			<a href="#"><u>CARES Initiatives</u></a> <a href="#"><u>ALJ Work Analysis Study</u></a>
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Day 3 – Thursday, December 1, 2016			
9:00am – 10:00am	Meeting with: Office of the Chief Actuary (OCACT)	Steve Goss, Chief Actuary Karen Glenn, Deputy Chief Actuary (Long-Range) Eli Donkar, Deputy Chief Actuary (Short-Range)	<a href="#"><u>OACT First 100 Days</u></a>
10:15 am – 11:15am	Meeting with: Office of the Chief Strategic Officer (OCSO)	Ruby Burrell, Chief Strategic Officer  Alan Lane, Acting Deputy Chief Strategic Officer	<a href="#"><u>OCSO Critical Priorities</u></a>  <a href="#"><u>Agency Strategic Plan Timeline</u></a>  <a href="#"><u>Office of the Chief Strategic Officer First 100 Days</u></a>  <a href="#"><u>OGC Bankruptcy Project - Factors Considered</u></a>  <a href="#"><u>Contract Timelines Deloitte and The Clearing</u></a>  <a href="#"><u>Customer Satisfaction Survey Sampling and Response</u></a>

11:15am – 12:15pm	Meeting with: Office of Retirement and Disability Policy (ORDP)	Virginia Reno, DC Marianna LaCanfora, ADC	<a href="#"><u>ORDP Challenges and Opportunities</u></a>  <a href="#"><u>ORDP 2017 Work Plan</u></a>
12:15pm – 1:15pm	Working Lunch Meeting with: Office of Budget, Finance, Quality, and Management (BFQM) – Part 2	Michelle King, DC Kate Hickman, ADC Sean Brune, ADC	<a href="#"><u>Major Projects by Cost</u></a>  <a href="#"><u>SSA Reduce the Footprint Plan</u></a>  <a href="#"><u>Reduce Footprint Template Sept 2016</u></a>  <a href="#"><u>Office of Facilities and Logistics Management Overview</u></a>  <a href="#"><u>Agency AntiFraud Strategic Plan</u></a>  <a href="#"><u>Office of AntiFraud Programs FY 16 Workloads</u></a>
1:30pm – 2:30pm	Meeting with: Office of Systems (DCS)	Rob Klopp, DC Sylviane Haldiman, ADC Diana Andrews, ADC Tom Grzyski, ADC	<a href="#"><u>Office of Systems Org Chart</u></a>  <a href="#"><u>Office of Systems ART Overview</u></a>  <a href="#"><u>Cyber Security Priorities</u></a>



2:45pm – 3:45pm	Meeting with: Office of Human Resources (DCHR)	Dr. Reginald Wells, DC Tina Waddell, ADC	<a href="#"><u>DCHR First 100 Days</u></a>	
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The Parties agree to extend the current National Agreement until March 31, 2018. The Agreement will automatically renew itself from year to year thereafter. However, either party may give written or electronic notice of its intent to add, amend, reopen, modify or terminate existing Articles of the Agreement not more than 120 or less than 90 calendar days prior to the expiration date. Such notice must be accompanied by a list of the Articles that either party intends to add, amend, reopen, modify or terminate. Ground rule negotiations will then begin no later than 30 calendar days after receipt of the notice provided by either party. Ground rule negotiations will be conducted in accordance with Article 4, Section 2 (i.e., number of bargaining days, number of negotiators, payment of travel and per diem).

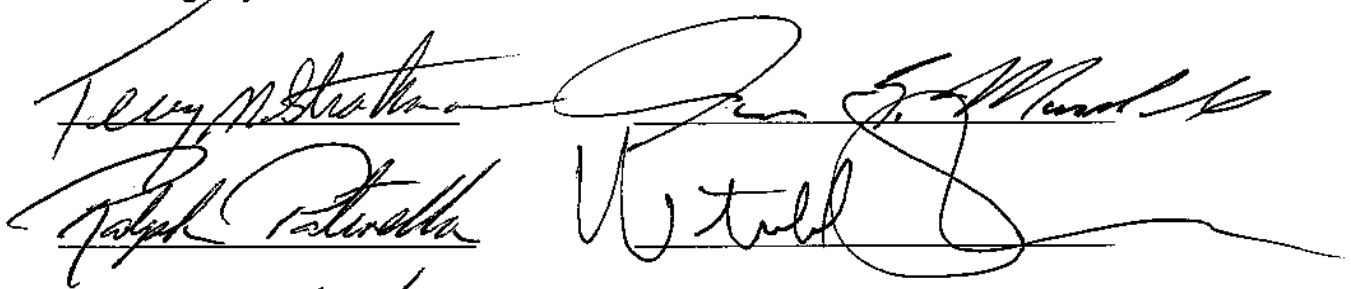
As part of this extension, the Parties agree to incorporate the following revisions to the 2012 National Agreement effective on April 1, 2017. Specifically:

AFGE agrees to the following changes to the 2012 National Agreement:

- Management has the discretion to not grant a ROC award to any employee who was subject to a disciplinary action of a reprimand or greater. (Article 17, Section 5.A)
- No administrative leave on a day when an office is closed and employee is scheduled to Telework on that day. (Article 41, Section 6)

For the Agency:

For the Union:

The image shows two columns of handwritten signatures. The left column, under 'For the Agency:', contains two signatures: the top one appears to be 'Terry M. Strathman' and the bottom one 'Ralph R. Strathman'. The right column, under 'For the Union:', contains two signatures: the top one appears to be 'John J. Marshall' and the bottom one 'W. T. Tull'. Each signature is written in dark ink on a white background.

DATE:

12/14/16

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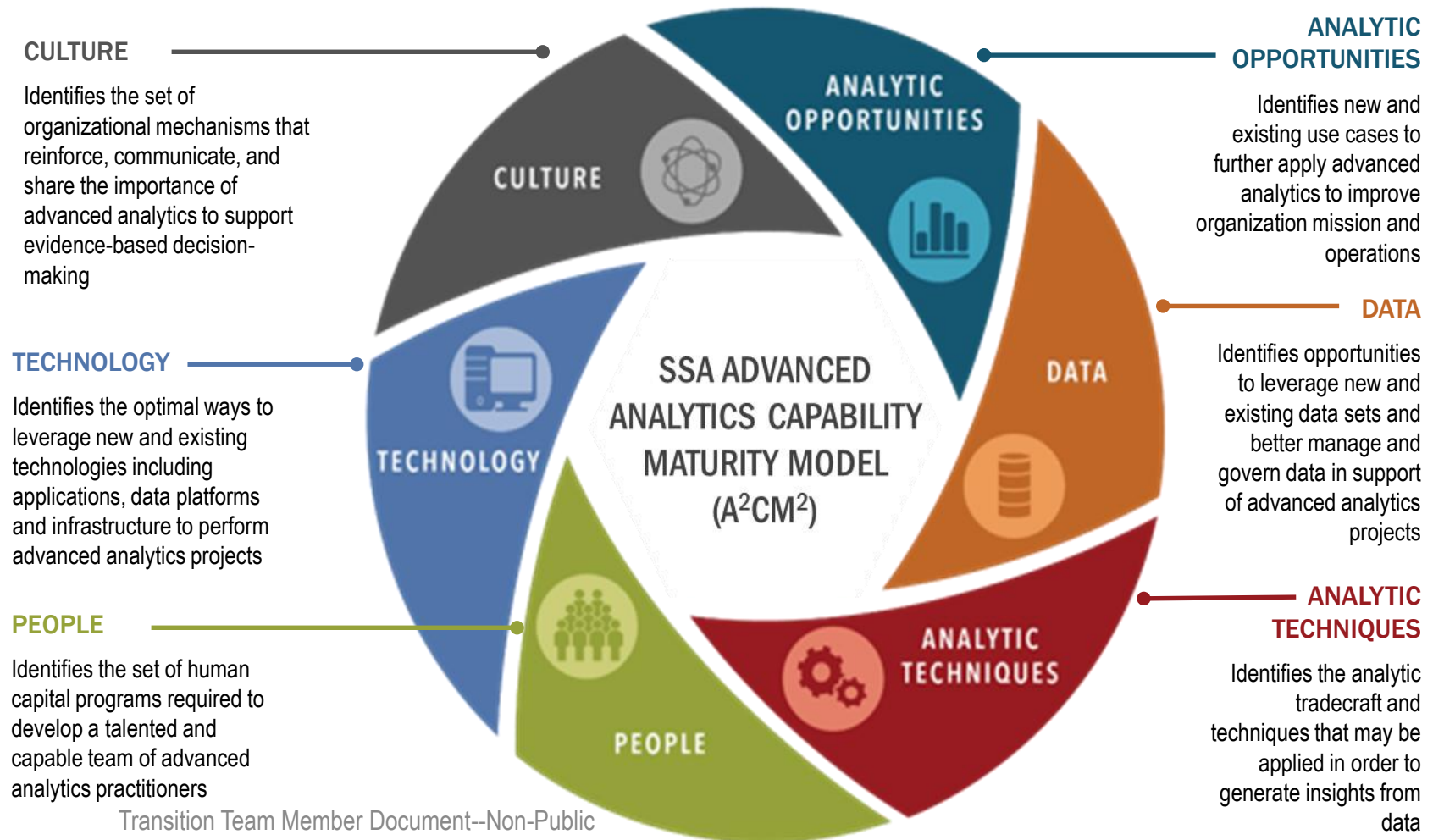
# Social Security Administration Analytics Center of Excellence

Advanced Analytics Capability Maturity  
Model (A<sup>2</sup>CM<sup>2</sup>) & Scores

*December 1, 2016*

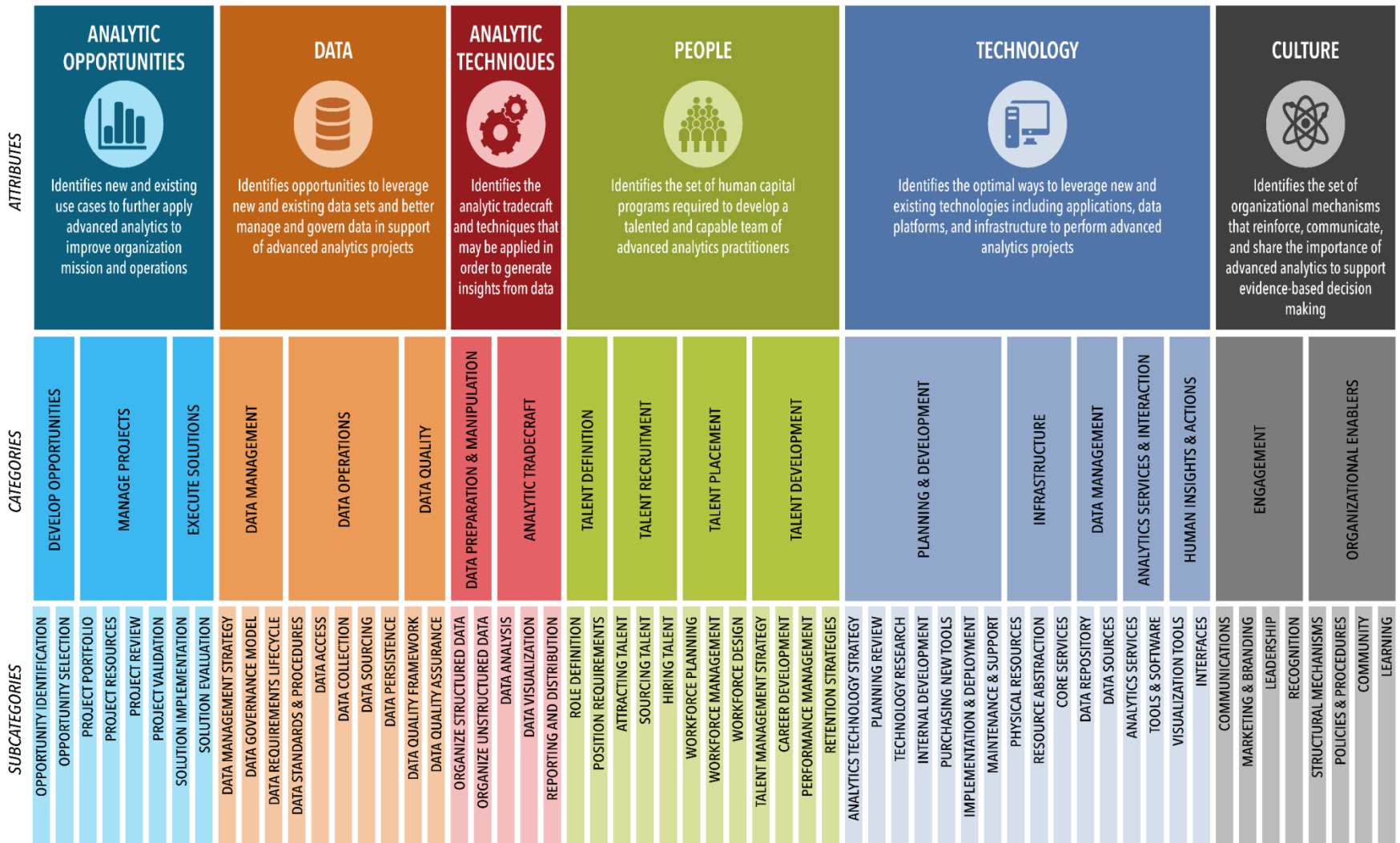
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# Advanced analytics capability requires an integrated collection of six critical attributes



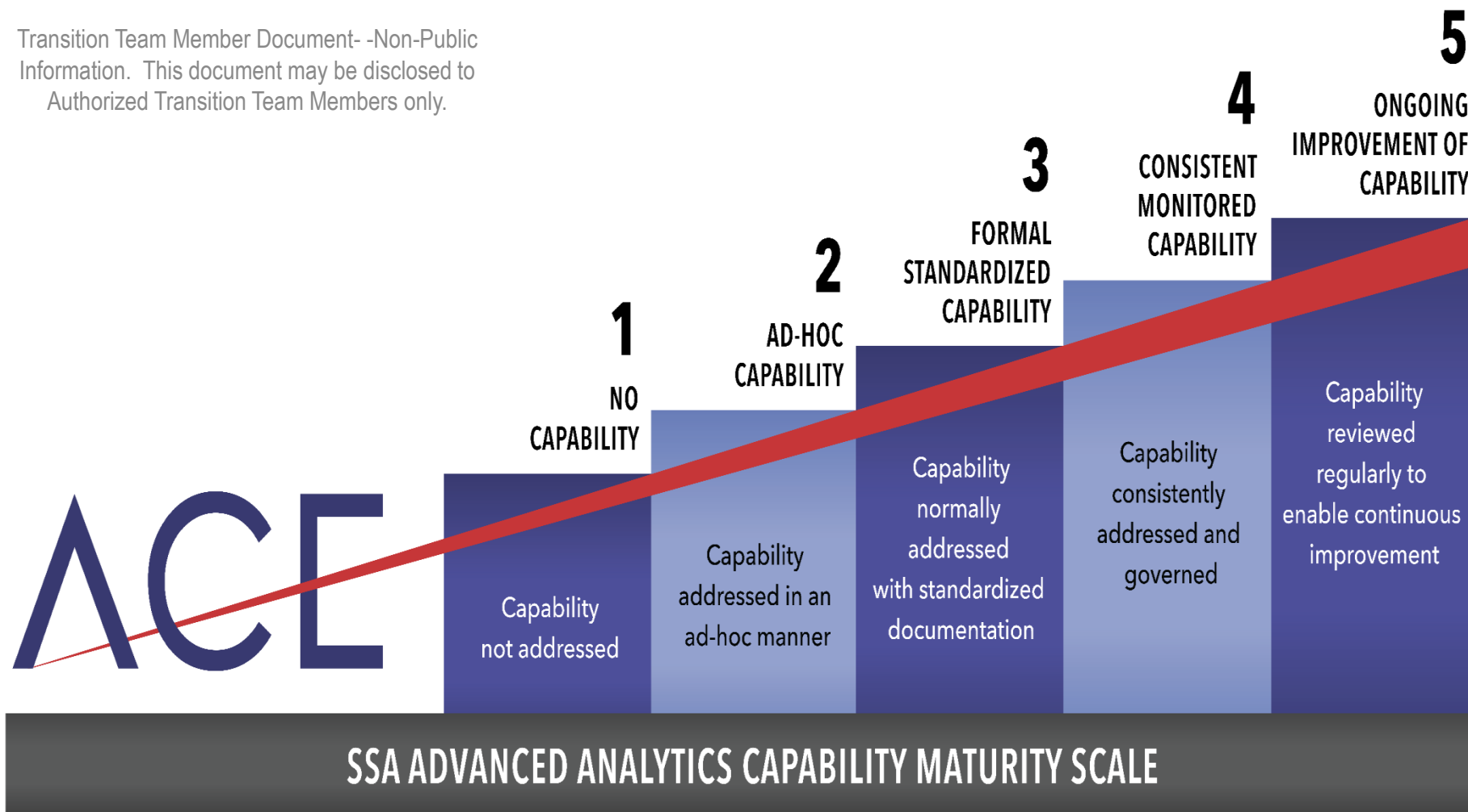
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# ADVANCED ANALYTICS CAPABILITY MATURITY MODEL (A<sup>2</sup>CM<sup>2</sup>)



# Each attribute and subcategory has five evidence-based levels of maturity – ranging from no capability to continuous improvement

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# Agency Results at the Attribute Level for the Advanced Analytics Capability & Maturity Model Assessment

## Agency Scores

ATTRIBUTE	CURRENT (FY16)
ANALYTIC OPPORTUNITIES	2
DATA	3
ANALYTIC TECHNIQUES	3
PEOPLE	2
TECHNOLOGY	2
CULTURE	2
OVERALL	2

- The High-Level agency assessment includes results from executive interviews, an analytics survey, and DC-level self assessments
- We conducted content analysis to develop an evidence-based analytics capability maturity score (across the six attributes)
- The agency score is a normal average of component scores. All components and attributes were weighted equally
- The agency demonstrates overall *ad hoc* capability where analytics needs are fulfilled on a case-by-case or as-needed basis

## Component Scores

COMPONENT	A <sup>2</sup> CM <sup>2</sup> SCORE
OACT	3
BFQM	4
OCOMM	2
ODAR	3
OGC	2
DCHR	2
OLCA	1
DCO	1
ORDP	3
DCS	2
OCSO	3
SSA Overall	2





# Administrative Law Judge Work Analysis Study

## Executive Summary

**Prepared for:** The Association of Administrative Law Judges

**Prepared under:** Contract Agreement dated Nov 7, 2014  
Work Order 3 dated Oct 14, 2015

**Authors:** Cheryl Paullin, Ph.D., HumRRO  
Leaetta M. Hough, Ph.D., Dunnette Group  
Joseph Caramagno, HumRRO

**Date:** November 12, 2015

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# Administrative Law Judge Work Analysis Study

## Executive Summary

Social Security Administration (SSA) Administrative Law Judges (ALJs) are expected to process adult disability cases as efficiently as possible to reduce the Agency's case backlog and produce timely decisions for claimants. ALJs are also expected to render *high quality legally sufficient decisions*. Numerous Agency policies and memoranda from the Office of the Chief Administrative Law Judge (OCALJ) emphasize that ALJs must carefully read all case materials, make every reasonable effort to obtain relevant evidence for each case, and write well-documented decisions explaining their ruling.

These are not unreasonable expectations. However, the SSA's Office of Disability and Adjudication Review (ODAR) has implemented production quotas that appear to be based entirely on reducing the case backlog and reducing the number of days it takes for claimants to receive a ruling on their case. The quotas appear to have been set without regard to the amount of time (hours) required for an ALJ to carefully process adult disability cases.

One benchmark that ODAR has set is the requirement that each ALJ schedule a certain number of hearings per month. This benchmark is enforced by linking it with the opportunity for the ALJ to telework.

A February 18, 2014 memo from Chief Administrative Law Judge Debra Bice provided this rationale for the benchmark:

*Considering the necessity for quality, timely, and policy compliant hearings and decisions, and historical data, **scheduling** an average of at least fifty (50) cases for hearing per month will **generally** signify a reasonably attainable number for the purposes of this contractual provision. I want to emphasize that this provision concerns the number of hearings **scheduled**, not cases heard or dispositions issued. Accordingly, if you **schedule** at least an average of fifty (50) cases for hearing per month during a twelve-month rolling cycle, then management generally will determine you have scheduled a reasonably attainable number of cases for hearing for the purposes of this contractual provision. Conversely, if you schedule fewer than an average of fifty (50) cases for hearing per month during a twelve-month rolling cycle, then management likely will determine you have not scheduled a reasonably attainable number of cases for hearing, unless there are extenuating circumstances. [Author note: Bold, underlined print appeared in the original.]*

The **scheduled hearings benchmark** was officially implemented on October 1, 2015. It is being phased in across 3 successive 6-month telework cycles. For the first 6-month cycle, ALJs who wish to telework must schedule 40 hearings per month, on average, or face restrictions on their eligibility to telework. The benchmark increases to 45 scheduled hearing per month, on average, for the 2<sup>nd</sup> telework cycle, then to 50 scheduled hearings per month, on average, for the 3<sup>rd</sup> and all subsequent telework cycles.

Another performance standard ODAR established relates to **case disposition**. Specifically, since 2007, each ALJ is expected to achieve 500-700 case dispositions per year. Dispositions include cases that are dismissed and cases for which the ALJ renders a decision (favorable/award or unfavorable). The SSA's public data archive shows that, for the past three

fiscal years, 18% of cases were dismissed, leaving 82% requiring an ALJ's decision. Some portion of case decisions can be made on-the-record (OTR) which means that the ALJ is able to render a favorable decision based entirely on reading the case file without conducting a hearing although the ALJ must still read the entire case file and write a decision. (Data on the percentage of OTR decisions issued per fiscal year is not, apparently, publically available although experienced ALJs report that the percentage of OTR decisions issued per fiscal year is very small.)

Each of the preceding metrics may be very relevant for tracking and monitoring organizational- or unit-level performance, but the process by which the quotas were established for individual ALJs appears not to relate to actual ALJ work requirements. Performance standards for ALJs should take into account the amount of time realistically required to do all of the activities involved in adjudicating cases such as reading the case file, conducting a hearing, developing additional needed information about the case, drafting decision instructions for a decision writer, and editing the draft decision. Performance standards should also take into account other work activities, such as engaging in professional development and training, and performing general case management and office duties, that ALJs must do in addition to processing adult disability cases.

The Association of Administrative Law Judges (AALJ) contracted with Human Resources Research Organization (HumRRO) and its subcontractor, the Dunnette Group, Ltd., in the fall of 2014 to study the amount of time and factors involved in adjudicating adult disability cases. We designed and completed a *work analysis* study to capture the type of information necessary to create performance standards for ALJs. It is the only study to date that uses a work analysis approach to gather information about the amount of time required for ALJs to process adult disability cases.

**Work analysis** has a long tradition in the fields of industrial-organizational psychology, industrial engineering, human factors, and human resources. It provides the foundation for personnel performance management systems. The design involved identifying the many work activities that ALJs must perform – experienced ALJs helped us identify activities that ALJs do when adjudicating adult disability cases and to identify other work activities ALJs perform. One commonly used work analysis approach is to simply survey job incumbents about time spent on various work activities. In this study, it was important to estimate time spent for a range of easy to difficult cases. Therefore, we designed a simulated case processing task and accompanying survey to collect information from ALJs about how long it takes to perform case processing and other activities. To standardize ALJs' frame of reference in rating time spent on case processing, we asked them to read and render a decision on each of three recent closed cases that varied in length. Thirty-one (31) ALJs read the entire case files, rendered a decision, wrote decision instructions and recorded their time. They then estimated the amount of time they spend on the other adult disability case processing phases as well as professional development and training, general case management, and office duties.

Assuming that the ALJ carefully complies with SSA directives regarding legally sufficient decisions, our study shows that it takes 5.69 hours of ALJ labor, on average, to render a decision for a case that is 206 pages in length. As shown in the Executive Summary Table 1, it takes 7.09 hours to render a decision for a case that matches the FY2014 national case size average of 652 pages. Finally, it takes 8.60 hours, on average, to render a decision for a lengthy case (1,065 pages). As a point of comparison, in FY2014, the majority of adult disability cases consisted of more than 500 pages and 12% of them consisted of more than 1,000 pages.

We calculated the number of hours ALJs could spend processing each case if they rendered 500 decisions per year. Our study indicates that, after subtracting authorized rest breaks, holidays, and annual leave, and the average number of work hours ALJs spend on activities such as professional development and training, ALJs have about 2.5 hours, on average, to spend on each case if they render 500 decisions per year. This seems nearly impossible given that it takes on average a little more than 5½ hours for ALJs to render a legally sufficient decision for a short case (206 pages), slightly more than 7 hours to render a legally sufficient decision for a case of average size (655 pages), and a little more than 8½ hours to render a legally sufficient decision for a long case (1065 pages).

We understand that the annual quota of 500-700 case dispositions includes both dismissals and decisions, and that about 18% of cases are dismissed. Clearly, dismissals would require less than 5.69 (or 7.09 or 8.60) hours to process. Still, the dismissal rate would have to be much higher than 18% to reduce the average time available per case for those that require a decision to only 2.5 hours.

**Executive Summary Table 1. Amount of Time Needed to Render a Decision per Case Based on 2015 Work Analysis Study versus Amount of Time Available per Case to Render 500 Decisions in a Year**

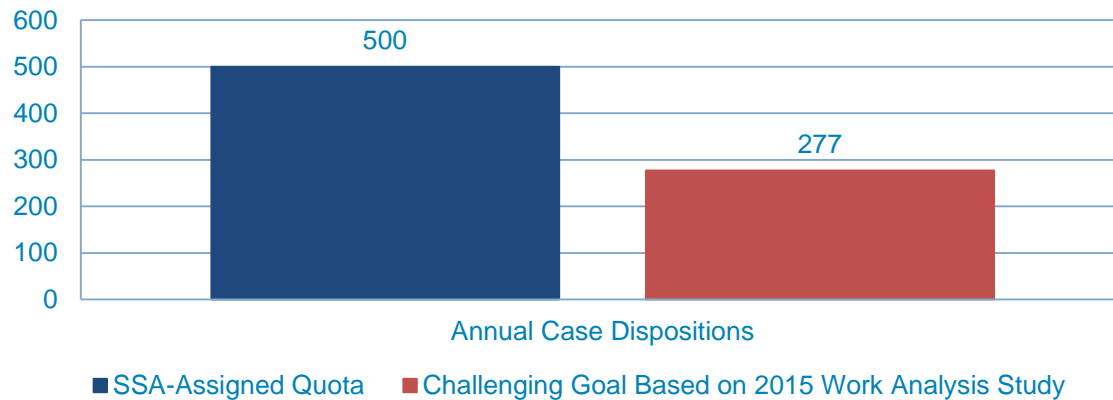
	Case Size		
	Short (206 pages)	Average (655 pages)	Long (1065 pages)
Time required, on average, to render a decision in accordance with SSA directives regarding legally sufficient decisions	5.69 hours	7.09 hours	8.60 hours
Time available per case, on average, for full-time ALJ after accounting for rest breaks, holidays, leave, and other work activities that ALJs perform	2.5 hours	2.5 hours	2.5 hours

*Note.* Data in first row are based on work analysis study in which 31 ALJs adjudicated the same three closed case files. Data in the second row was calculated by subtracting time spent on authorized rest breaks, federal holidays, authorized annual leave, and work activities unrelated to adjudicating specific cases from the 2,087 work hours available in a year for full-time federal government employees.

Next, we calculated the number of adult disability cases of average size that each ALJ could reasonably decide in a year, after taking into account that ALJs, like other federal government employees, have authorized rest breaks, holidays, and annual leave time, and spend work time on activities such as professional development and training, general case management activities, and general office duties – activities separate from processing individual cases.

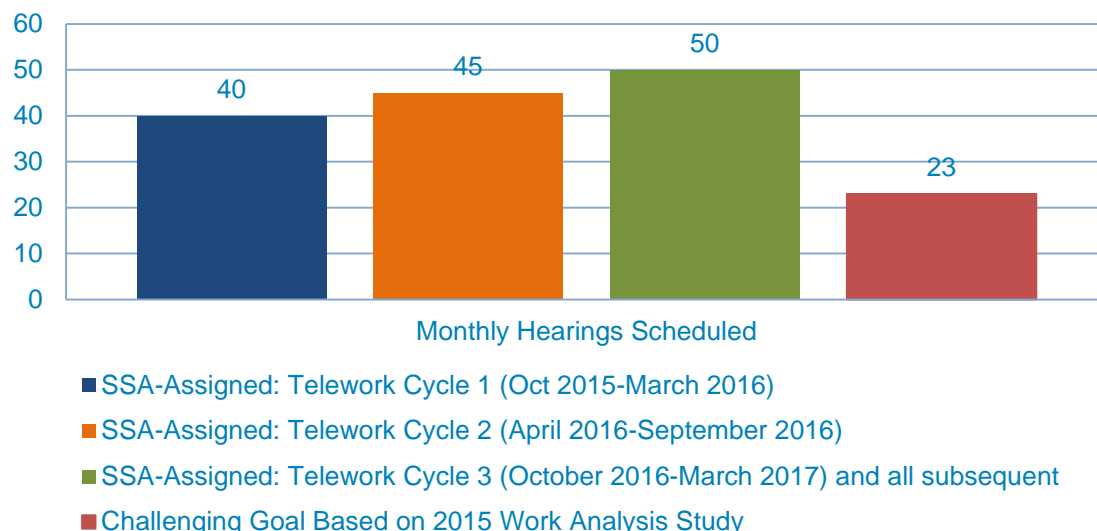
The work analysis study data indicate that the number of case decisions that an ALJ could render ranges from 70 to 342 per year (with an average of 191 and a median of 195), assuming a case of average size and following SSA policy directives regarding legally sufficient decisions. A challenging goal could be set higher than the average decision rate, but not so high that most ALJs could not reach it. Among the ALJs in the work analysis study, 25% could render decisions for at least 233 cases per year (this is the 75<sup>th</sup> percentile in the distribution). Thus, a challenging annual goal for **case decisions** is 233 cases per year. A challenging goal for **case dispositions** is 277 per year, assuming that the national dismissal rate continues to be 18% of all cases. Executive Summary Figure 1 illustrates the results.

### Executive Summary Figure 1 Annual Case Dispositions: SSA-Assigned Quota versus a Challenging Goal Based on 2015 Work Analysis Study



Our work analysis study also provides data relevant to the monthly benchmark for scheduling hearings. Using an annual case disposition goal of 277, a challenging *monthly benchmark for scheduling hearings* would be 23 hearings on average per month ( $277 \div 12$ ) as shown in Executive Summary Figure 2.

### Executive Summary Figure 2 Monthly Hearings Benchmark: SSA-Assigned versus a Challenging Goal Based on 2015 Work Analysis Study



The challenging goals we describe are lower than current SSA-assigned quotas which are (a) 500-700 case dispositions per year and (b) an average of 40 scheduled hearings per month (with the amount increasing to 50 hearings per month within 18 months). Our work analysis study suggests that the ***SSA scheduling benchmark of 40 hearings per month, on average, is not reasonably attainable if SSA policy directives regarding legally sufficient decisions are followed.***

We understand that some ALJs are able to achieve the annual case disposition quota and the hearings scheduled benchmark. They are powerfully motivated to do so for a variety of reasons, including the following:

- SSA management *expects* ALJs to meet the case disposition production quota unless, in conjunction with their manager, it is determined that there are good reasons why an ALJ should not be required to meet it (e.g., *Social Security Disability Programs*, May 17, 2012; *Social Security Disability Programs*, September, 13, 2012; U.S. SSA OIG, 2010).
- ALJs can be counseled or disciplined if their performance does not meet management expectations for the number of case dispositions they should be able to achieve.
- Productivity data for each ALJ is available to the public through SSA data archives. ALJs with lower productivity levels may be subject to negative publicity or public pressure. (For example, see [http://www.ssa.gov/appeals/DataSets/archive/03\\_FY2015/03\\_September\\_ALJ\\_Disposition\\_Data.html](http://www.ssa.gov/appeals/DataSets/archive/03_FY2015/03_September_ALJ_Disposition_Data.html).)
- ALJs who wish to telework must meet monthly case scheduling benchmarks or they may face restriction on their ability to telework. (See memos from Chief Administrative Law Judge Bice [February 18, 2014; Appendix C] and from HOCALJ Walters [July 17, 2015; Appendix D])

Years of research on goal setting clearly shows that, in many different types of jobs and educational settings, people accomplish more when they work toward specific, difficult goals, as opposed to having no goals at all or only broad, ambiguous goals such as “do your best” (Locke & Latham, 2013). Certainly, SSA has established specific, difficult production and hearings scheduled goals for ALJs. However, goal attainment is also strongly impacted by the extent to which individuals commit to achieving the goals and believe they have the ability and the resources necessary to accomplish them.

Our work analysis study indicates that the SSA’s goals would be very difficult for many ALJs to meet. Kerr and LePelley (2013) report that stretch goals can have a positive impact on performance, but only if people accept them and believe they can be accomplished. If people do not believe they can achieve stretch goals, their motivation and performance often decreases.

Another danger associated with establishing easily counted goals, such as the number of case dispositions and number of hearings scheduled, is that these goals may conflict with an equally important but harder to count goal, namely, decision quality. This is the classic speed-quality tradeoff. SSA requires ALJs to maximize both speed and quality goals. As far back as 1975, Steven Kerr published an article in the *Academy of Management Journal* entitled, “*On the folly of rewarding A, while hoping for B*” (Kerr, 1975). For ALJs, it appears that the SSA is rewarding case processing production (A) while hoping for high quality decisions (B).

In an article entitled “*Goals gone wild: The systematic side effects of overprescribing goal setting*,” Ordóñez, Schweitzer, Galinsky, and Bazerman (2009) showed that goal setting can



lead to unintended side effects such as neglect of all nongoal areas, increasing the incidence of unethical behavior, corrosion of organizational culture, and reduced motivation among employees, among others. It appears that, over the past few years, the SSA has already experienced some of these unintended side effects including excessively high allowance rates for some ALJs, too many decisions containing errors or of low quality, and low morale among ALJs.

Our study also sheds some light on one likely way in which ALJs accomplish the monthly hearings scheduled benchmark and annual case disposition quota – by working uncompensated hours. According to two independent samples of 31 and 98 ALJs, many ALJs work outside of normal work hours, on holidays, and in lieu of using their authorized annual leave. Most use less than ¼ of their authorized sick leave. Why would they do this? Likely because they care deeply about producing high quality decisions and because they are under tremendous pressure to meet the annual case disposition production quota and the monthly scheduled hearings benchmark.

In conclusion, our study indicates that the requirement to schedule 40 cases per month, on average, is not reasonably attainable, nor is it reasonable to expect ALJs to achieve 500-700 case dispositions annually while also complying with SSA directives on legally sufficient decisions. Obviously, opinions could vary about how challenging “reasonably attainable” goals should be, and some might prefer more or less stringent challenges. The point is that a ***work analysis approach can provide the necessary foundation for an informed discussion about where benchmarks and goals should be set.***

Our study developed and piloted a solid methodology for ALJ work analysis. While our data are based on responses from a relatively small number of ALJs, it is the only study to our knowledge that attempts to establish production goals *based on the amount of labor required to actually adjudicate cases.*

If the SSA conducts its own work analysis study, it could:

- Perform a qualitative study of case processing practices used by the most productive ALJs *who are also producing legally sufficient decisions.*
- Carry out a simulated case processing study similar to the one we designed only with a larger sample of ALJs.
- Develop a modeling tool to estimate the number of cases that ALJs can reasonably process taking into account (a) proportion of cases likely to be dismissed, (b) proportion of likely OTR decisions, (c) case size, (d) case complexity, (e) competence of available decision writers, and (e) assumptions about the number of work hours available for case processing.

We understand that this study would not be easy, but the necessary research could be done. It could start with the variables that we examined, and then add more as they become available. Importantly, the modeling tool should be dynamic, because the factors listed in the third bullet above can and do vary over time and differ across regions and HOs.

Finally, our study also generated ideas and changes in the current SSA ALJ work situation that would reduce the amount of ALJ time needed to adjudicate adult disability cases. SSA could pursue these and other ideas to increase the efficiency of ALJs.



# FEDERAL EMPLOYEE VIEWPOINT SURVEY

## Office of Human Resources Summary Fact Sheet

This summary presents the 2012-2016 Federal Employee Viewpoint Survey (FEVS) results for the Social Security Administration (SSA). The Best Places to Work rankings and scores are available for 2003 through 2016.

### Background

Federal Regulation ([\*SEC. 1128. EMPLOYEE SURVEYS. page 250 of the National Defense Authorization Act for Fiscal Year 2004\*](#)) requires agencies to conduct an annual survey of their employees. The FEVS fulfills that requirement.

### Analysis Methodology

We used the percentage of positive responses from FEVS questions to conduct a comparative analysis of survey results. Per OPM guidance, percent positive results include responses recorded in the two categories of “Strongly Agree/Agree,” “Very Satisfied/Satisfied,” or “Very Good/Good”.

We use index scores to measure the degree to which employees are satisfied with various aspects of their work. Index scores are points of comparison across organizations and a means of measuring global progress from year to year.

### Summary Tables

#### Global Satisfaction

The Global Satisfaction Index indicates how satisfied employees are with their job, pay, organization, and their willingness to recommend their organization as a good place to work.

**Table 1 – 2012 through 2016 Global Satisfaction Index Scores**

Year	Global Satisfaction
2016	66
2015	69
2014	66
2013	65
2012	69



## Employee Engagement

This index measures key principles that keep employees engaged in their work. These principles include how effectively leaders lead, how well supervisors support and respond to employees, and intrinsic work experiences, such as innovation and connection to the agency's mission.

**Table 2 – 2012 through 2016 Employee Engagement Index Scores**

<b>Year</b>	<b>Employee Engagement</b>	<b>Leaders Lead</b>	<b>Supervisors</b>	<b>Intrinsic Work Experiences</b>
2016	67	58	71	71
2015	68	60	73	73
2014	66	57	71	71
2013	67	59	70	71
2012	69	62	71	73

## Human Capital Assessment and Accountability Framework (HCAAF)

The HCAAF identifies human capital systems that together provide a consistent, comprehensive representation of human capital management for the Federal government.

**Table 3 – 2012 through 2016 HCAAF Index Scores**

<b>Year</b>	<b>Leadership &amp; Knowledge Management</b>	<b>Results–Oriented Performance Culture</b>	<b>Talent Management</b>	<b>Job Satisfaction</b>
2016	63	52	57	67
2015	65	53	59	68
2014	62	50	57	66
2013	62	50	55	66
2012	65	52	59	68

## New Inclusion Quotient (New IQ)

The New IQ comes from the concept that individual behaviors, repeated over time, create habits necessary for inclusiveness. This index monitors the five Habits of Inclusion: Fair, Open, Cooperative, Supportive, and Empowering.

**Table 4 – 2012 through 2016 New IQ Index Scores**

Year	New IQ	Fair	Open	Cooperative	Supportive	Empowering
2016	59	46	59	59	77	57
2015	60	46	59	61	78	58
2014	58	42	56	58	77	57
2013	58	43	54	59	75	57
2012	60	45	57	62	75	59

## Best Places to Work Rankings and Scores

The [Best Places to Work in the Federal Government®](#) rankings offer a comprehensive assessment of how Federal public servants view their jobs and workplaces, providing employee perspectives on leadership, pay, innovation, work–life balance, and other issues. The Partnership for Public Service bases these rankings, in part, on agency FEVS scores.

**Table 5 – 2003 through 2016 Best Places to Work Rankings and Scores**

Year	Ranking	Score
2016	9th out of 18 large agencies	63.1
2015	6th out of 19 large agencies	66.0
2014	6th out of 19 large agencies	63.2
2013	6th out of 19 large agencies	63.0
2012	6th out of 19 large agencies	66.4
2011	6th out of 33 large agencies	70.1
2010	6th out of 32 large agencies	71.6
2009	9th out of 32 large agencies	67.0
2007*	7th out of 30 large agencies	66.5
2005	21st out of 30 large agencies	60.6
2003	15th out of 28 large agencies	61.7

\*Noted as the most improved



# FEDERAL EMPLOYEE VIEWPOINT SURVEY

## Senior Executive Service Results

### Office of Human Resources Summary Fact Sheet

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This summary presents the 2010-2016 Federal Employee Viewpoint Survey (FEVS) results for the Social Security Administration's (SSA) members of the Senior Executive Service (SES).

#### Background

Federal Regulation ([\*SEC. 1128. EMPLOYEE SURVEYS. page 250 of the National Defense Authorization Act for Fiscal Year 2004\*](#)) requires agencies to conduct an annual survey of their employees. The FEVS fulfills that requirement.

#### Analysis Methodology

We used the percentage of positive responses from FEVS questions to conduct a comparative analysis of survey results. Per OPM guidance, percent positive results include responses recorded in the two categories of "Strongly Agree/Agree," "Very Satisfied/Satisfied," or "Very Good/Good".

We use index scores to measure the degree to which employees are satisfied with various aspects of their work. Index scores are points of comparison across organizations and a means of measuring global progress from year to year.

#### Summary Tables

##### SES Global Satisfaction

The Global Satisfaction Index indicates how satisfied employees are with their job, pay, organization, and their willingness to recommend their organization as a good place to work.

**Table 1 – 2010 through 2016 Global Satisfaction Index Scores**

Year	Global Satisfaction
2016	81
2015	77
2014	76
2013	80
2012	81
2011	79
2010	76

## SES Employee Engagement

This index measures key principles that keep employees engaged in their work. These principles include how effectively leaders lead, how well supervisors support and respond to employees, and intrinsic work experiences, such as innovation and connection to the agency's mission.

**Table 2 – 2010 through 2016 Employee Engagement Index Scores**

<b>Year</b>	<b>Employee Engagement</b>	<b>Leaders Lead</b>	<b>Supervisors</b>	<b>Intrinsic Work Experiences</b>
2016	83	81	86	84
2015	75	67	80	79
2014	80	72	85	83
2013	82	75	84	86
2012	80	75	80	84
2011	80	79	79	84
2010	76	67	78	81

## SES Human Capital Assessment and Accountability Framework (HCAAF)

The HCAAF identifies human capital systems that together provide a consistent, comprehensive representation of human capital management for the Federal government.

**Table 3 – 2010 through 2016 HCAAF Index Scores**

<b>Year</b>	<b>Leadership &amp; Knowledge Management</b>	<b>Results–Oriented Performance Culture</b>	<b>Talent Management</b>	<b>Job Satisfaction</b>
2016	84	73	77	83
2015	71	64	74	78
2014	75	69	74	80
2013	79	68	75	79
2012	75	70	71	82
2011	80	67	64	78
2010	70	63	66	82

### SES New Inclusion Quotient (New IQ)

The New IQ comes from the concept that individual behaviors, repeated over time, create habits necessary for inclusiveness. This index monitors the five Habits of Inclusion: Fair, Open, Cooperative, Supportive, and Empowering.

**Table 4 – 2010 through 2016 New IQ Index Scores**

<b>Year</b>	<b>New IQ</b>	<b><i>Fair</i></b>	<b><i>Open</i></b>	<b><i>Cooperative</i></b>	<b><i>Supportive</i></b>	<b><i>Empowering</i></b>
2016	79	75	80	82	84	75
2015	71	67	76	71	75	67
2014	75	72	78	74	82	68
2013	76	71	76	79	78	76
2012	74	71	74	72	77	73
2011	77	72	78	92	77	68
2010	69	61	69	71	75	68

### SES Best Places to Work Scores

The Best Places to Work in the Federal Government ® scores offer a comprehensive assessment of how Federal public servants view their jobs and workplaces, providing employee perspectives on leadership, pay, innovation, work–life balance, and other issues.

**Table 5 – 2010 through 2016 Best Places to Work Scores**

<b>Year</b>	<b>Score</b>
2016	80
2015	76
2014	78
2013	81
2012	82
2011	77
2010	74

## Monitoring ALJ Behaviors and the Focused Review Process

**Transition Team Member Document--Non-Public Information. This document may be disclosed to Authorized Transition Team Members only.**

### **Early Monitoring System:**

The Early Monitoring System (EMS) monitors the ALJ corps for statistical anomalies in a variety of areas. The Decision Statistical Index Tool (hereinafter the “EMS tool”) measures the performance of ALJs in the following categories: agree rate less than 50 percent; allowance rate greater than 85 percent; allowance rate less than 20 percent; high dispositions per day above 3.0; low dispositions per day below 1.0; dismissal rate; partial rate on decisions; on-the-record decision rate; percentage of cases with more than 3 hearings; bench decision rate on 1 favorable; average time in ALJ-controlled statuses in the agency’s Case Processing & Management System (CPMS) (ALJ controlled statuses: ALJ DWR, ALPO, ARPR, ALJ Writing, Edit, and ALJ SIGN) and overall interest score based upon these preceding factors. EMS also looks at pairings between judges and representatives, and judges and experts.

### Focused Reviews:

The focused review process was established to help ensure that administrative law judges (ALJs) and managers have the necessary information to provide timely and legally sufficient decisions. The process includes a thoughtful approach to referrals, being mindful that assessing policy compliance is the primary purpose of the review, that the agency has limited resources, and that the process is not disciplinary but educational and informational. Referrals are based on algorithms, including the Early Monitoring System (EMS); inquiries from inside and outside the agency; results from own motion reviews; or other information. The reviews are not limited to review of an individual adjudicator’s work. The goal is to help ALJs and hearing offices provide services to the public in the form of quality adjudication and decisional articulation.

### Sample of Sanitized Representative Focused Review Summaries:

- **ALJ A:** Referred for a focused review due to low number of dispositions and a low agree rate. The Office of the Chief Administrative Law Judge (OCALJ) prepared a training package based on the results of the focused review for the subject ALJ.  
**Outcome:** The ALJ refused to meet with the Hearing Office Chief Administrative Law Judge (HOCALJ) and Regional Chief Administrative Law Judge (RCALJ) to discuss the results of the review or the proposed training, and subsequently retired.
- **ALJ B:** Referred for a focused review due to a high allowance rate and a low agree rate. A review and a re-review were completed and ALJ underwent two training sessions and was assigned a mentor.  
**Outcome:** ALJ has shown sustained improvements with an agree rate that has improved over 40 percent.

**ALJ C:** Referred for a focused review due to a high allowance rate and a high number of bench decisions. ALJ completed training.

**Outcome:** While allowance rate has remained high, ALJ's agree rate has improved and there has been a significant decrease in bench decisions.

- **ALJ D:** Referred for a focused review due to low agree rate. A review and a re-review were completed and the ALJ underwent training. Regional management continued to work with OCALJ to address ongoing issues.  
**Outcome:** ALJ's agree rate improved 15 percent, and ALJ retired.
- **ALJ E:** Referred for a focused review due to a high allowance rate, low agree rate, and low productivity. A review and a re-review were completed, and ALJ underwent training including collaborative training with two ALJs.  
**Outcome:** ALJ demonstrated moderate sustained improvement and ALJ will retire at the end of calendar year 2016.
- **ALJ F:** Referred for a focused review due to reports of policy noncompliance from Regional office and an agree rate of less than 70 percent. A review and re-review were completed and ALJ completed training following each review.  
**Outcome:** ALJ's agree rate has improved almost 20 percent and Regional office continues to work with OCALJ to address ongoing policy compliance issues.
- **ALJ G:** Referred for a focused review due to a low allowance rate. The focused review revealed minor policy noncompliance issues. ALJ completed training.  
**Outcome:** ALJ continues to have an agree rate above the national average. Regional management has reported no ongoing concerns related to this ALJ.
- **ALJ H:** Referred for a focused review due to a low agree rate. ALJ completed prepared training, and attended refresher training as well.  
**Outcome:** During the fiscal year in which the review and training took place, ALJ demonstrated an increase in agree rate of over 10 percent.
- **ALJ I:** Referred for a focused review due to a low allowance rate. The report revealed minimal policy issues. OCALJ developed training materials.  
**Outcome:** ALJ continues to have an agree rate that exceeds agency expectations.
- **Medical Expert:** Referred for a focused review after study regarding potential medical expert rotational issue showed that 50 percent of this medical expert's invoices from the agency were based on payments for cases of two ALJs in one hearing office. Agency sent a cure letter to the medical expert.  
**Outcome:** Medical Expert is no longer an expert with the agency.

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# Transition | 2016

## Social Security Administration

### AGENCY BRIEFING BOOK



Securing today  
and tomorrow

NOVEMBER 2016



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## EXECUTIVE SUMMARY

For more than 80 years, Social Security has represented a promise between generations that has kept millions of people above the poverty line in their old age and disability-prone years, providing critical resources for housing, food, and medication. Every application, inquiry, and visitor matters to us, because the work we do could be the difference between a person having a roof over his or her head or being homeless.

In the last year, we provided financial protection for nearly 64 million individuals who receive almost a trillion dollars annually, in Social Security retirement, disability, and survivors' benefits, and Supplemental Security Income (SSI) payments.

Our dedicated employees are unwavering in their commitment to serve every customer with the utmost professionalism and compassion, in the service channel of the customer's choice.

In publishing our *Vision 2025* last year, we identified three essential pillars that underpin our aspirational picture of Social Security over the next decade: **a superior customer experience**, offered by **exceptional employees**, through an **innovative organization**. We have begun to map out our 10-year path, identifying critical priorities and foundational steps toward fulfilling our vision. Already, we have seen significant progress in implementing our critical priorities, which include advancing customer engagement, improving service delivery in our disability programs, investing in our employees, modernizing our information technology (IT), and accelerating data-driven decisions. We have added several key online services in our continuing quest to provide customer choice in accessing our services and we have invested in the development of our workforce even through a constrained fiscal climate, to ensure they can continue to offer the highest quality service to the American public. We are pursuing new foundational initiatives, such as our enterprise program management office and our enhanced IT investment program (ITIP), to position Social Security to implement key twenty-first century service delivery improvements.

Despite our notable progress, we are facing an unprecedented funding shortfall as we enter fiscal year (FY) 2017, which will severely challenge our ability to maintain the service on which the American public has come to depend. If we are to meet the evolving demands and needs of an aging Baby Boom population, which is retiring and potentially becoming disabled in significant numbers, we will need adequate and sustained funding, and must identify new and creative ways to address increased traffic and surging caseloads.

The President's FY 2017 budget for Social Security would go a long way towards realizing our strategic objectives, including reducing our pending disability cases and hearing decisions, preventing and decreasing improper payments, and enhancing online services, all while covering our basic fixed costs and other obligations. However, the stark reality of a potential year-long Continuing Resolution (CR) for the balance of FY 2017, puts our long-term vision and service delivery objectives at grave risk. Hiring freezes, loss of institutional knowledge through attrition, stagnated Information Technology initiatives, and furloughs are real and tangible barriers to meeting our customers' needs.

The next Administration and agency leadership will inherit a Social Security workforce that is competent, compassionate, and committed to continuing our long tradition of outstanding service. However, without sufficient resources, these exceptional employees will not be able to deliver on the program's decades-long social contract. The first and most critical imperative for our new leaders, therefore, is to secure sufficient funding to serve the American public at a level it has earned, expects, and deserves.

# OUR AGENCY

## OUR MISSION AND VISION

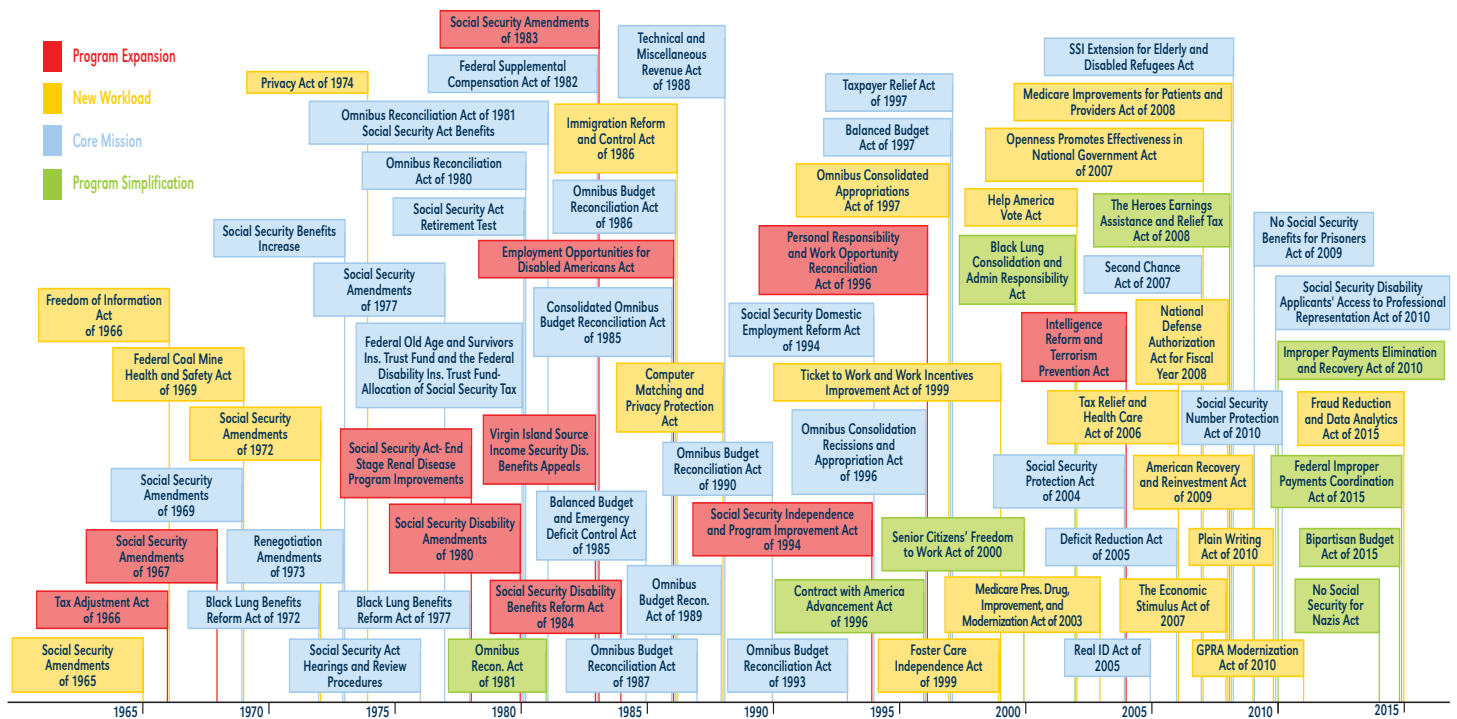
### MISSION

Our mission is to deliver Social Security services that meet the changing needs of the public.

### HISTORY AND CULTURE

Great satisfaction comes from knowing that the people who need our benefits most – retirees, people with disabilities, children, and families – receive the help they need. Social Security continues to give Americans hope and support with expanded programs that offer more than even President Franklin D. Roosevelt envisioned over 80 years ago, when he signed the Social Security Act into law.

### Social Security Administration Legislative History: 1965 through the Present



## VISION 2025



**Vision 2025**, released in April 2015, serves as our “north star” to guide us as we position our agency to deliver services now and in the future.

Defining Vision 2025 is the first step in our long-range strategic planning process for envisioning, planning, and achieving success – the “aspirational” picture of the future of our agency. The Vision reflects considerable input from a broad range of audiences and serves as the framework for addressing three priority areas:

- Superior Customer Experience;
- Exceptional Employees; and
- Innovative Organization.

Social Security’s executive leadership team and the Executive Vision Council collaborated to identify foundational efforts aligned with the Vision 2025 framework. From this collaboration, our Agency Critical Priorities emerged. Our priorities for FY 2016-2017 is to build on the work we began in previous years, and reflect the most important work we must do in service of our aspirational vision for 2025. Unlike our day-to-day activities of delivering services and managing the agency, this work represents our long-term commitment to our strategic direction for the organization.



The strategic roadmap for realizing Vision 2025 consists of three elements: Agency Strategic Plans (ASP), short-term agency critical priorities, and long-range recommendations. Work on the FY 2018-2022 ASP is already underway, with a draft due to the Office of Management and Budget (OMB) in June 2017, and an anticipated publication date of January 2018. Each year for the foreseeable future, we plan to prepare a list of short-term agency critical priorities identifying key areas

of immediate focus that support longer-term strategic goals and objectives in the then-current ASP. We continue to develop and refine the long-term recommendations, which will be an ongoing effort.

The strategic roadmap is a living communications tool describing the desired outcomes of Vision 2025 and providing an overview of current and recommended transformational initiatives for the next 10 years. We will update and refine the roadmap continuously to reflect the agency’s operating environment, changes to external factors, and our increasing understanding of customer preferences.

For more information, visit [Appendix G: Agency Critical Priorities for 2016-2017](#).

## OUR ORGANIZATIONAL STRUCTURE

Serving the American public requires a vast network of facilities, technology, and skilled staff. Every day more than 60,000 employees provide a full range of services to our customers. Nationwide, we have a network of more than 1,500 offices, which includes regional offices, field offices, Social Security card centers, tele service centers, processing centers, hearing offices, National Hearing Centers (NHC), the Appeals Council, and our headquarters in Woodlawn, Maryland.

Additionally, more than 16,000 state employees at disability determination services (DDS) offices work in 54 jurisdictions and provide services in about 100 offices across the country and U.S. territories. Internationally, we deliver services in the U.S. embassies in more than one hundred countries.

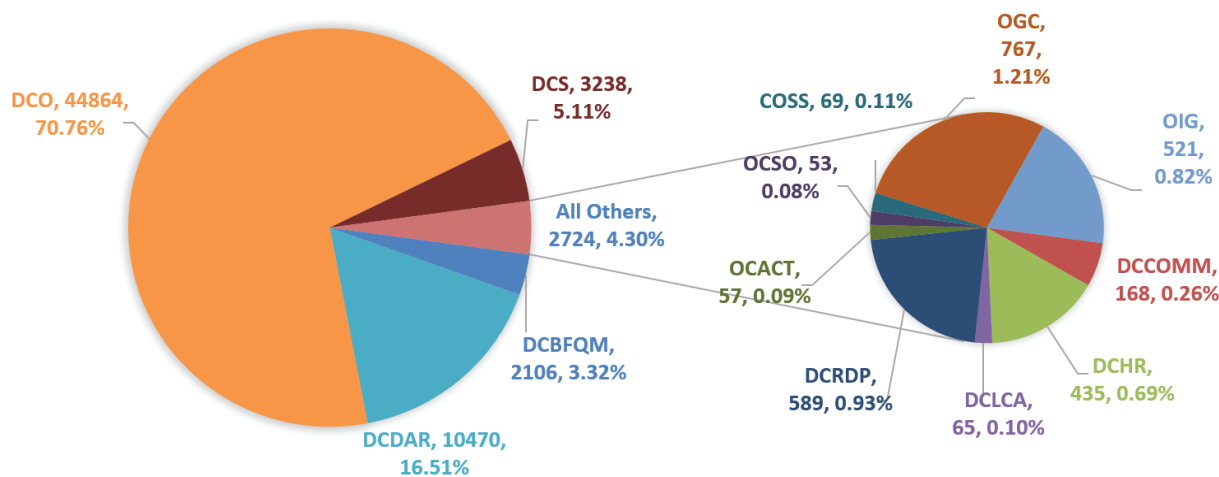
Customers receive in-person service at our field offices and Social Security card centers. Our tele service centers primarily handle calls to our National 800 Number Network (N8NN). Employees in our processing centers typically handle complex claims and post-entitlement work that is not automated or requires manual handling. The Foreign Benefits Unit (FBU) serves customers living abroad.

There are two records management sites, which are located in Kansas City, MO and in Boyers, PA. We are in the process of digitizing paper records of wages, claims, and post-entitlement actions.

We have created strong partnerships with state agencies, and we depend on state employees in DDS offices to make disability determinations. Administrative Law Judges (ALJ) in our hearing offices and the Administrative Appeals Judges (AAJ) at our Appeals Council decide appeals involving Social Security and SSI issues.

### ORGANIZATIONAL OVERVIEW

Our organization is comprised of employees at headquarters and in the regions. Following is a pie chart that shows all permanent agency employees by component. The main pie shows the four largest components. The smaller pie expands all other components. Additional graphs showing headquarters and regional demographics are shown in the following sections.



*Note: Data as of 9/30/16 from Workforce at a Glance report.*

For more information about our components and their functions, view [Appendix A: Agency Organizational Chart](#) or the information in [Appendix C: Contact Information for Key Executives and Management Responsibilities](#).



## HEADQUARTERS COMPONENTS

Our headquarters offices are primarily located on campus at 6401 Security Blvd., Woodlawn, MD, in the southwest suburbs of Baltimore. There are additional offices in outlying buildings in the Baltimore Metro area. We also occupy space in Washington D.C. at the International Trade Commission Building at 500 E Street, SW, and 400 Virginia Ave, SW.

Below is a high-level break down of our headquarters organizational structure.

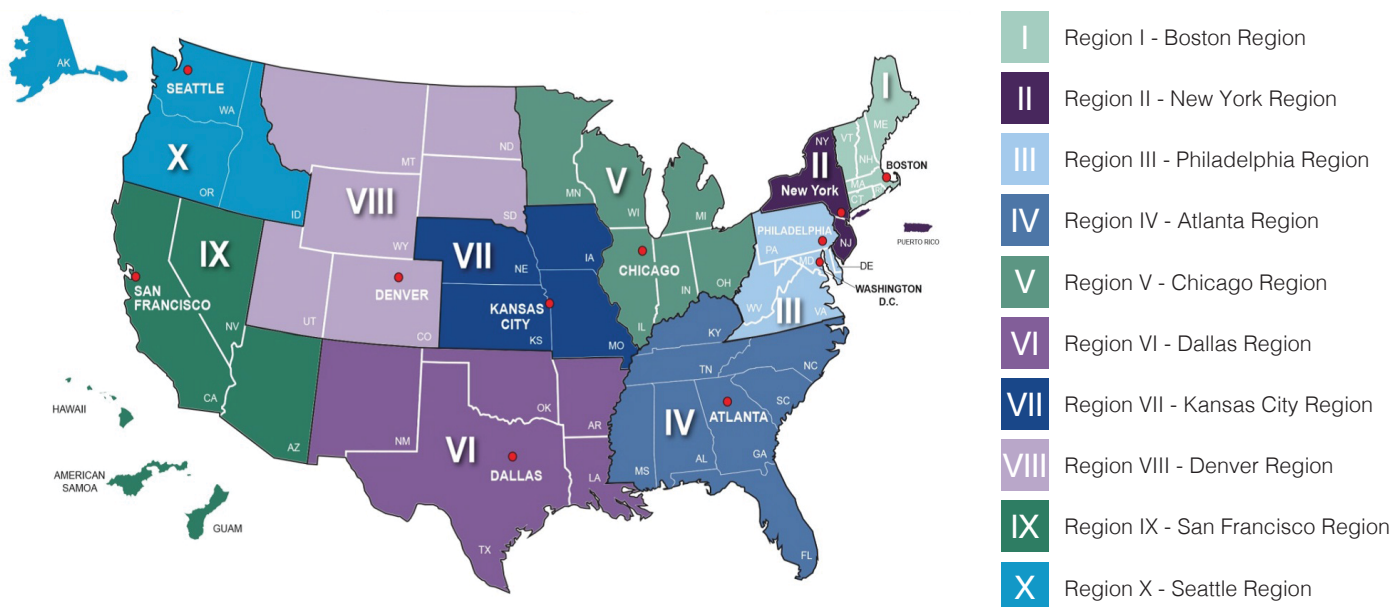
- **Office of the Commissioner (COSS)**
- **Agency Level Offices**
  - Chief Actuary (OCACT)
  - Chief Strategic Officer (OCSO)
  - General Counsel (OGC)
  - Inspector General (OIG)\*
- **Deputy Commissioner Level Offices**
  - Budget, Finance, Quality, and Management (DCBFQM)
  - Communications (DCCOMM)
  - Disability Adjudication and Review (DCDAR)
  - Human Resources (DCHR)
  - Legislation and Congressional Affairs (DCLCA)
  - Operations (DCO)
  - Retirement and Disability Policy (DCRDP)
  - Systems/Chief Information Officer (DCS/CIO)

*\*The Inspector General (IG) is under the general supervision of the Commissioner of Social Security, but the IG may not be prohibited from initiating, carrying out, or completing any audit or investigation, or from issuing any subpoena. The OIG at Social Security was established on March 31, 1995, pursuant to the Social Security Independence and Program Improvements act of 1994.*

## REGIONAL STRUCTURE

We generally organize our operations into the 10 regions shown on the following map. Our regional structure also includes:

- 10 Regional Offices;
- 51 Area Directors Offices;
- 1,212 Field Offices;
- 164 Hearing Offices;
- 5 Hearing Centers;
- 4 National Case Assistance Centers;
- 14 Card Centers;
- 32 Call Centers;
- 11 Quality Review Field Sites;
- 8 Processing Centers;
- 54 State DDSs;
- 6 Federal Benefits Units in Rome, Manila, London, Frankfurt, Mexico City, and San Jose (Costa Rica).



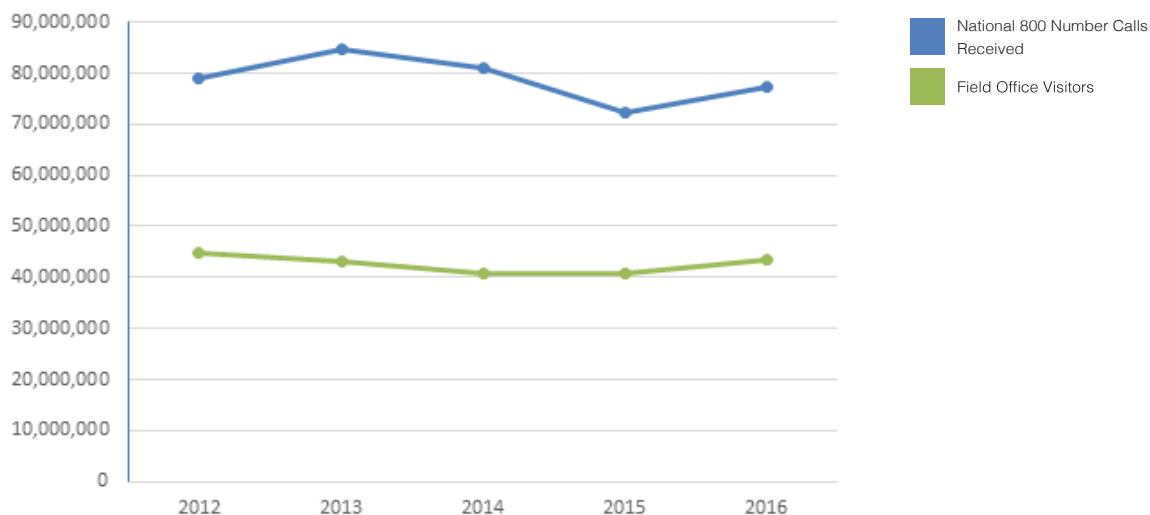
## FIELD OFFICES

Our more than 1200 field offices comprise our largest contingent of front-line employees, whose daily work puts them in direct touch with millions of customers. They are claims representatives, service representatives, and other technical experts who process the full gamut of benefits claims, SSN applications, and post-entitlement actions. In FY 2016, we received over 42 million field office visits. Below is a five-year historical look at the number of field office visits.

## N8NN CALLS

We received over 77 million phone calls to our toll-free network, 1-800-772-1213 (TTY 1-800-325-0778), in FY 2016. Our tele service representatives handle calls on every aspect of our programs, such as requests for specific claims information, explanation of notices, directions to offices, and requests for appointments. Below is a five-year historical look at the number of phone calls we received to our N8NN.

### N8NN Calls Received and Field Office Visitors by FY



Note: There were 53 weeks in FYs 2011 and 2016.

## PAYMENT CENTERS (PC)

The PC process a diverse variety of adjudication, post entitlement, and manual workloads, such as awards, address changes, retroactive payments, overpayments, and attorney's fees, just to name a few. We have eight PC:

- PC 1: North Eastern (NEPSC)
- PC 2: Mid-Atlantic (MATPSC)
- PC 3: South Eastern (SEPSC)
- PC 4: Great Lakes (GLPSC)
- PC 5: Western (WNPSC)
- PC 6: Mid-America (MAMPSC)
- PC 7: Office of Disability Operations
- PC 8: Office of International Operations

## HEARING OFFICES

We have 164 hearing offices and 5 national hearing centers. Our case technicians, decision writers, judges and a range of support staff handle appeals from claimants whose cases are denied at the earlier stages of our claims process.

We also have four national case assistance centers that support decision writing and case pulling. We have more than 1,600 ALJs presiding over 700,000 hearings each year. Upon claimant request or on the Appeals Council's own motion, the Council reviews ALJ decisions and dismissals involving claims for benefits filed under Titles II (2) and XVI (16). In FY 2016, the Office of Appellate Operations (OAO) processed 159,000 requests for review, up 5.53 percent from FY 2015. OAO also reviews federal court appeals of hearing decisions.

## ONLINE PRESENCE

Our website has come a long way since it first went live in May 1994. Today, we have over 20 online services and, each month, millions of Americans rely on our website to learn about our programs and services, and to conveniently and securely apply for benefits.

Online services, like the Retirement Estimator, Retirement Application, and Extra Help Application (for assistance paying for Medicare prescriptions), continue to rank as the best in government and higher than many top-rated private sector companies. Thanks to the popularity of these [online services](#), more than half of all retirement applications are filed online. Our Frequently Asked Questions (FAQ) service is in demand, too, receiving more than two million hits each month.

[my Social Security](#), which launched in 2012 with the online [Social Security Statement](#), is a free online account that offers the public quick, convenient, and secure access to their personal Social Security record. If a person receives benefits or has Medicare, they can use a [my Social Security](#) online account to:



- Request a replacement Social Security card if they meet [certain requirements](#);
- Get a [benefit verification letter](#);
- Check their benefit and payment information and earnings record;
- [Change their address and phone number](#);
- [Start or change direct deposit](#) of their benefit payment;
- Get a [replacement Medicare card](#); and
- Get a [replacement SSA-1099 or SSA-1042S](#) for tax season.

Those who do not receive benefits can use a [my Social Security](#) online account to:

- Request a replacement Social Security card if they meet [certain requirements](#);
- Get a [Social Security Statement](#) to review:
  - Estimates of retirement, disability, and survivors benefits;
  - Earnings once a year to verify the amounts we post are correct;
  - The estimated Social Security and Medicare taxes they've paid; and
- Get a [benefit verification letter](#).



In addition to our focus on providing online services, we continue to look for other online opportunities to help the public. Social media has become an important communication channel for us in recent years. Our use of social media supports our mission to “deliver Social Security services that meet the changing needs of the public,” and our vision of “proudly serving Social Security customers throughout their lifetime, when and where they need us.” For more information, visit our [social media hub](#), or any of our specific channels, such as:



## OUR WORK

Social Security is an earned benefit — a benefit that is critically important to the people who receive it. It is a foundation of economic security when workers and their families face what President Franklin D. Roosevelt called “the hazards and vicissitudes of life.” It is the nation’s most effective poverty prevention program, keeping 21 million people out of poverty. In fact, 9 out of 10 individuals age 65 and older receive Social Security benefits. During FY 2016, we paid more than \$932 billion to more than 60 million beneficiaries.

### CORE WORKLOADS



Social Security benefits have been a foundational element of the nation’s economic security system for more than 80 years. Initially intended to protect against poverty in old age, we have expanded significantly since the first lump-sum payment in 1937.

#### FIRST SOCIAL SECURITY BENEFICIARY

Ida May Fuller worked for three years under the Social Security program. On January 31, 1940, she received the program’s first monthly retirement check, in the amount of \$22.54.

### OLD-AGE, SURVIVORS, AND DISABILITY INSURANCE PROGRAMS (OASDI)

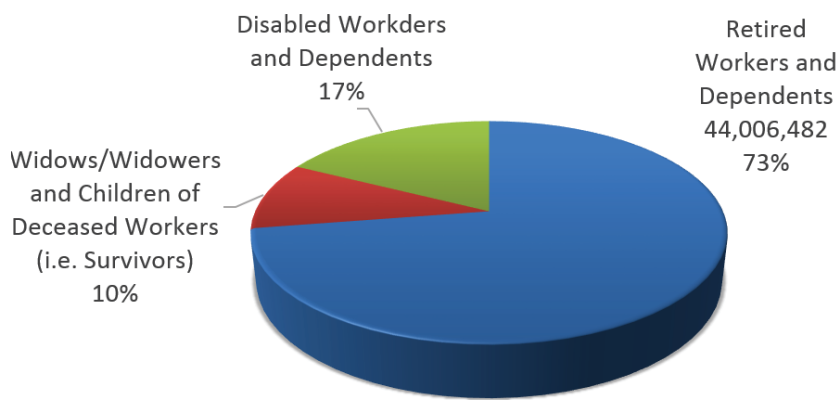
#### OLD-AGE AND SURVIVORS INSURANCE (OASI)

Today, most retirees plan their retirement dates based on when they can receive their Social Security benefits. Created in 1935, the OASI program (which provides what most people think of as their Social Security benefit) provides retirement and survivors benefits to qualified workers and their families. Workers earn credit towards Social Security benefits by working and paying Social Security taxes. Most people need 40 credits, or 10 years of covered work, to qualify for retirement benefits.

A worker qualifies for full-retirement benefits between the ages of 65 and 67, depending on the year he or she was born. Reduced retirement benefits are payable as early as age 62. Certain members of retired workers’ families may

also receive benefits. Spouses (including divorced spouses), minor children, and children who became disabled before age 22 may also be eligible for benefits.

#### Who Receives Old-Age, Survivors, and Disability Insurance Benefits?



Social Security also provides income for families of workers who die. Survivors benefits were added in 1939 and benefits for disabled widows and widowers were added in 1968. Widows, widowers (and divorced widows and widowers), dependent parents, and children may be eligible for survivors benefits. In fact, 98 percent of children could get benefits if a working parent dies. Social Security pays more benefits to children than any other federal program.

Source: [Social Security Office of the Chief Actuary](#), as of September 30, 2016

## DISABILITY INSURANCE (DI)

Becoming disabled before reaching full retirement age (FRA) is not something most people consider. However, studies show that a 20-year-old worker has more than a 1-in-4 chance of becoming disabled before reaching FRA.

The disability program began in 1956 to provide benefits for workers with disabilities between the ages of 50 and full retirement. The program expanded in 1960 to include workers with disabilities of all ages.

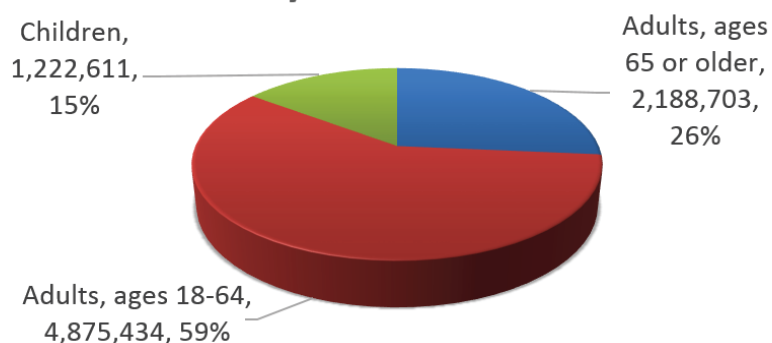
People may qualify for Social Security DI benefits if they have worked long enough and paid Social Security taxes, and cannot work because they have a medical condition expected to last at least one year or result in death. Certain members of their families also may qualify for DI benefits. We have a robust, five-step sequential evaluation process, based on the statutory definition of disability, to determine when an adult claimant is disabled, and ensure that only disabled individuals receive DI benefits.

First, we determine if the claimant is working. In FY 2016, if the claimant's monthly earnings average is at or below \$1,130, we look at their medical condition. To have a disability under Social Security's definition, the claimant's medical condition must significantly limit their ability to do basic work activities—such as lifting, standing, walking, sitting, and remembering—for at least 12 months. If the claimant's medical condition is severe, we determine if the claimant's impairment(s) meets the severity of a listed impairment that we recognize as qualifying for DI benefits.

If the severity of the claimant's impairment(s) does not meet the level of a listed impairment, we decide whether the claimant's impairment(s) prevents him or her from performing past work. If it does prevent a claimant's performance of past work, we will consider whether there is other work the claimant can still do. We consider other factors like age, education, past work experience, and the claimant's skills.

This thorough evaluation process is important to ensure that we make quality decisions the first time, and that only qualified individuals receive DI benefits.

### Who Receives Supplemental Security Income Benefits?



### SSI

The SSI program, established in 1972, is a federal program providing monthly payments to people with limited income and resources who are aged, blind, or disabled. Adults and children under age 18 can receive SSI payments based on disability or blindness.

General tax revenue, not workers' Social Security taxes, funds the SSI program.

Source: [Social Security Office of Retirement and Disability Policy](#), as of September 30, 2016.

## SSN AND EARNINGS RECORDS

Since we began in 1936, we have issued more than 472 million unique SSNs. Today, babies born in the United States receive a SSN at birth. Qualifying foreign-born workers may also receive SSNs. We also complete millions of actions to keep our number holders' records current and accurate. In FY 2016, we completed requests for more than 16 million new and replacement Social Security cards. In November 2015, we began processing replacement SSN cards online via our [Internet SSN Card Replacement application](#) for people who meet certain criteria in some states. We continue to expand the number of participating states in FY 2017.



We also receive regular updates from employers on the earnings of the working population and post those reported earnings to the workers' records. We link earnings records to SSNs and resolve any discrepancies. In FY 2016, we posted over 250 million earnings items to workers' records.

## SOCIAL SECURITY STATEMENT

The *Social Security Statement* informs people who have worked under the Social Security program of their reported earnings, estimates of the tax contributions they and their employers have paid, and estimates for retirement, disability, and survivor's benefits for which they may be eligible.

Workers age 18 or older can access their *Social Security Statement* online by [signing up](#) for a [my Social Security](#) account. We also mail *Social Security Statements* to workers attaining ages 25, 30, 35, 40, 45, 50, 55, 60, and older who are not receiving Social Security benefits and do not yet have a my Social Security account. In FY 2016, we mailed 47.9 million paper Statements. In the same timeframe, the public accessed their online Statement 40.6 million times.

## SPECIALIZED WORKLOADS

In addition to our core workloads, we also support other work across the federal government. These additional duties include:

### MEDICARE

We administer a number of aspects of the Medicare program, which provides health insurance for the aged and disabled. We process applications for Medicare Part A and Medicare Part B and determine whether applicants are entitled to Medicare coverage. We also explain basic coverage information when our customers have questions. For example, we explain Medicare Part A covers inpatient hospital care and Medicare Part B covers doctors' services and other outpatient services. We determine eligibility for low-income subsidies under the Medicare Prescription Drug Program (also known as Medicare Part D). As appropriate, we respond to inquiries, send notices, handle name changes and death notifications, and issue original and replacement Medicare cards. We also deduct Medicare premiums from the benefits of Social Security beneficiaries. The Centers for Medicare and Medicaid Services (CMS) reimburses us for some of the Medicare work we perform.

We also conduct outreach to identify persons who may be eligible for Medicare Savings Programs, which are state programs that assist low-income Medicare beneficiaries to pay some of their Medicare premiums. We send out approximately three million notices a year to Medicare beneficiaries who may be eligible for Medicare Savings Programs.

### HOMELAND SECURITY AND IMMIGRATION

The Department of Homeland Security (DHS) offers a free, voluntary, online program, known as E-Verify, which allows employers to confirm the employment eligibility of new hires. We support DHS by confirming whether new hires' names, SSNs, and dates of birth match the information in our records and by providing DHS with citizenship information contained in our records. Using that information, DHS checks its database to confirm the current work authorization of all non-citizens. Once these checks are complete, DHS informs the employer whether a new hire is authorized to work.

### OTHER ACTIVITIES MANDATED BY CONGRESS

We also perform many other workloads mandated by Congress, including activities related to: the Employee Retirement Income Security Act of 1974 (ERISA); the Coal Act; Supplemental Nutrition Assistance Program (formerly Food Stamps); and SSN Verifications for a wide-range of non-program purposes.

## AFFORDABLE CARE ACT (ACA)

The ACA outlines provisions that create additional responsibilities for our agency. These responsibilities include:

- Calculating Medicare Part D premiums for high income participants (implemented January 2011);
- Collecting and reporting increases in the Hospital Insurance tax on high-income taxpayers;
- Revising W-2 reporting requirements for the cost of employer sponsored health coverage; and
- Verifying SSNs and allegations of citizenship for health exchange participation.

In addition to verifying SSNs and allegations of citizenship, CMS requested that we provide data on the following elements to help determine initial eligibility: death, incarceration, monthly, and annual Title II income benefit amounts, quarters of coverage, and a disability indicator. CMS also requested that we provide specific data elements currently available in the data exchange required to process ACA redeterminations and renewals.

To further streamline processes, we are also leading data exchange efforts through a public-private partnership (P3) State Data Exchange Community of Excellence (CoE). For more information on our data exchange efforts, visit our [Data Exchange website](#).

We developed and maintain a secondary ACA verification service support site at our Second Service Center (SSC) in Durham, NC, to ensure uninterrupted service during scheduled and unscheduled systems shutdowns.

In addition, we participate in a wide range of outreach activities on the national and regional level to support enrollment in healthcare coverage under the ACA. We coordinate our outreach activities with the White House and the Department of Health and Human Services (HHS), and build on the HHS marketing plan. We share ACA information nationwide, in many instances with navigators and assisters provided by HHS. We direct particular attention towards target cities and populations that remain eligible to secure coverage in the marketplace, but have not done so. On a national level, we share information on ACA through various channels including multiple social media platforms, national conferences, conference calls with the advocate community, and large-scale notices to beneficiaries.

## DATA EXCHANGES

We support the work of other agencies by exchanging data, which streamlines processes across the federal government. For more information, go to the Policy Improvements section on the [Expansion of Data Exchanges](#).



# OUR EMPLOYEES

## THE HEART OF OUR AGENCY

We have over 60,000 dedicated and talented employees who make up our workforce, represented by various labor and management organizations. Our workforce is distributed across America in our headquarters facilities, vast network of field and hearing offices, SSN card and processing centers, and tele service centers.

Our employees are our greatest asset, and we must protect, engage, and support them in order to continue to meet ever-changing customer expectations and workload demands.

Through their compassion and dedication, our employees reflect the “heart of the agency,” providing a high-quality, personalized customer experience to our customers. Our talented workforce includes employees who serve customers directly on the front line, as well as those in supporting roles. We are empowered, knowledgeable, and equipped to meet our customers’ needs at the first point of contact. Direct and personal conversations have always been at the center of our service delivery model. This is what makes our agency and our employees unique. Our employees understand the critical role we play when a customer experiences challenging situations, such as the loss of income due to the death of a family member, severe disability, or other situations that bring customers to us in their moments of greatest need.

## WORKFORCE SNAPSHOT

The tables below represent a snapshot of our workforce as of September 30, 2016. The data includes full-time and part-time permanent career employees.

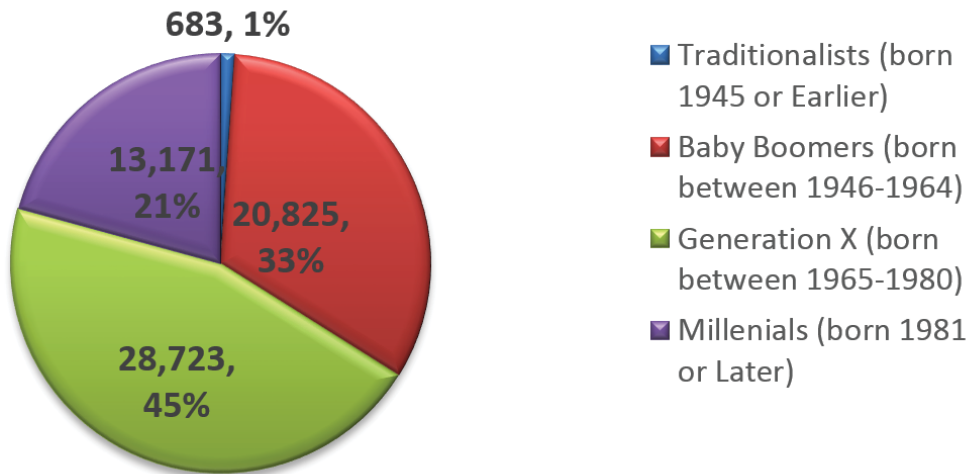
### Workforce Population

		NUMBER	PERCENTAGE
Full-Time Status	Full-Time (FTP)	62,532	98.63%
	Part-Time (PTP)	870	1.37%
Total Employees		63,402	
Supervisory Status	Non-Supervisory	56,763	89.53%
	Supervisory	6,639	10.47%
Component	*Field	50,960	80.37%
	Office of Central Operations	4,296	6.78%
	HQ	8,146	12.85%

\* Field employees include all employees who do not work in headquarters or the Office of Central Operations (OCO). Field employees come from DCO, DCBFQM, DCDAR, OGC, and OIG.

Note: Data as of 9/30/16 from Workforce at a Glance report.

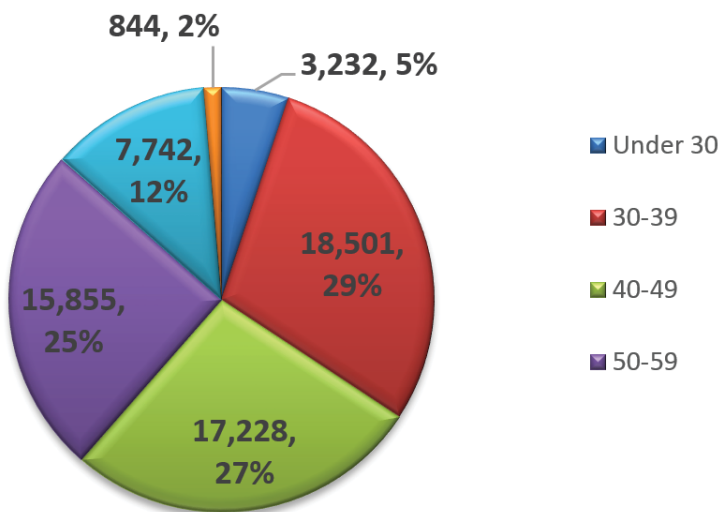
### Generational Information by Number of Employees



*Note: Data as of 9/30/16 from Workforce at a Glance report.*

### Age of the Workforce

The following chart shows our employees by age. The average age of all employees is 46 years old. The average age of our new hires is 38 years old. The average age of separating employees is 52 years old.



*Note: Data as of 9/30/16 from Workforce at a Glance report.*

## OUR CUSTOMERS

We take considerable pride in administering benefits and providing financial protection for nearly 61 million individuals who receive almost a trillion dollars annually in OASDI benefits. These include payments to retirees, spouses, disabled workers, children, and surviving family members, delivering on our agency's promise to secure today and tomorrow. We also make payments under our SSI program, to people with limited income and resources. Our rich history is founded on simple, yet profound principles, reflected in the integrity and compassion of our employees. It is this narrative and tradition upon which we build as our agency evolves and reorients our customer-centered focus to meet the emerging service needs of the public.

At Social Security, we remain true to our core principles and continue to provide critical services to those who need us most. We are committed to serving all of our customers efficiently, effectively, and compassionately, and to preserving the integrity of the Social Security programs for future generations. Our customers reflect the full diversity of the American public in age, education, income, ethnicity, race, and ability. They are:

- 39 million retired workers who, after a lifetime of work and contribution, rely on Social Security benefits for a portion of their income. For one out of five beneficiaries aged 65 and older, Social Security benefits are their sole source of income, and for two out of three, Social Security is half or more of their total income. Our benefits help individuals and families make ends meet and provide them with independence in their elder years.
- Four million children, including disabled adult children, and four million additional survivors dealing with life's most devastating losses.
- Nearly nine million workers who have faced a life-changing disability, leaving them unable to provide for themselves and their families.
- 8.4 million elderly, blind, or individuals with disabilities, living in poverty and relying on SSI to meet life's basic needs.
- Medicare beneficiaries who either have reached their senior years or become disabled. They can obtain medical treatment and services based on the contributions they have made while working, plus any necessary premiums.
- Our nation's current workforce, paying into Social Security in the form of taxes on their wages and income.
- Employers, businesses, non-profits, advocates, oversight groups, and other stakeholders who benefit from our services and provide critical support to us and to all of our customer groups.
- Government agencies, national and international, federal, state, municipal, territories, and Indian Nations.

We are with our customers through life's journey, when and where they need us.

## NOTABLE RECENT ACCOMPLISHMENTS

In the last couple of years, we have made great strides towards our aspirational Vision 2025 and the Agency Critical Priorities. For example, we have improved our customers' experience by releasing an online application for the public to request a replacement Social Security Number card. In addition, to improve our disability process, we have streamlined and clarified our policies.

We updated our critical infrastructure when we migrated to a new state-of-the-art data center that has won numerous design awards and creates a sustainable, efficient environment for at least the next 20 years.

We transformed our IT investment process by creating an enterprise-wide executive IT investment board to make informed funding decisions on projects of greatest benefit to our agency's mission. We also established a program management office that provides project management services for our critical projects, thereby increasing their likelihood of success.

We modernized some of our IT processes using an Agile development model and our Agency Cloud Initiative. In cybersecurity, we have focused our efforts in several areas, including the Cross Agency Priority (CAP) Goals for Cybersecurity, Strong Authentication for Online Services, and the DHS' Continuous Diagnostics and Monitoring (CDM). We also continue to implement cybersecurity best practices, including our robust Incident Response and our Security Operations Center (SOC), a defensive Enterprise Penetration Testing Program, and Malware and Anti-Phishing Defenses.

With adequate and sustained funding, we will continue this great work in FY 2017 and beyond. Below are more detailed descriptions of some of our recent accomplishments.

### STRONG CROSS-AGENCY COLLABORATION

We have collaborated across multiple federal agencies to advance a "one government agenda" to improve public service and achieve sensible, effective outcomes. Our active participation in the collective conversation has enabled us to modify our own business processes and policies, to the benefit of our customers, employees, and organization.

#### FEDERAL INTERAGENCY REENTRY COUNCIL

As a participating agency in the [Federal Interagency Reentry Council](#), Social Security continues to work with other federal agencies including the Department of Justice, Bureau of Prisons to increase transparency about government programs and services available to individuals preparing to return to the community. Our dedicated reentry web page, <https://www.ssa.gov/reentry/>, includes SSA-related information about accessing Social Security benefits and resource and links to other federal agencies. Family members and advocates can readily access information for their relatives or clients about filing for or reinstating benefits, veterans' services and healthcare.

#### ELDER JUSTICE COORDINATING COUNCIL

As part of the Patient Protection and the ACA, the Elder Justice Act was signed into law on March 23, 2010. The Elder Justice Act provides federal resources to "prevent, detect, treat, understand, intervene in, and where appropriate, prosecute elder abuse, neglect, and exploitation." The Elder Justice Coordinating Council is directed by the Office of the Secretary of Health and Human Services and the Secretary serve as the Chair of the Council. The Administration on Aging leads the overall Council efforts. We are one of 11 member agencies on the council, and we are constantly seeking opportunities to raise public awareness about the growing incidence of elder abuse and financial exploitation. The following areas are our most recent key accomplishments to date.

## Strengthening Communication with the Judicial System

We are collaborating with key stakeholders at the state court level to develop a communications protocol that will include notifying us when judges remove guardians who also serve as representative payees.

## Public Awareness

We are constantly seeking opportunities to raise public awareness about the growing incidence of elder abuse and financial exploitation. Through partnerships with other federal entities, we have worked to raise public awareness at various national and local aging conferences. We also developed an interdisciplinary training series for use by staff and other organizations who serve seniors and members of the public, which is designed to educate staff, broaden community awareness, and provide key resources to those seeking to reduce the incidents of elder abuse, neglect and financial exploitation.

## Working Interdisciplinary Networks of Guardianship Stakeholders Collaboration

We expanded our representation on the American Bar Association-sponsored Working Interdisciplinary Networks of Guardianship Stakeholders (WINGS). This organization currently exists in 16 states and provides technical assistance to court officials in states to create innovative, consensus-driven WINGS. We, along with the WINGS groups, engage in outreach, education and training, and serve as an ongoing forum to address the issues that frequently arise in adult guardianship, such as abuse, neglect, exploitation, and misuse of our benefits.

## DATA EXCHANGE AGREEMENTS

Through our agreements, we provide: over 2 billion SSN verifications annually; Social Security eligibility data to states to administer federal and state funded programs, and to federal agencies such as CMS to administer Medicare Parts A and B; death data to federal agencies administering federal benefit programs to prevent improper payments to deceased beneficiaries; and earnings information to federal agencies for eligibility determinations.

We also receive data such as: prisoner data from over 2,300 institutions to prevent payments to incarcerated individuals, birth data from states to administer enumerations; and eligibility data from other agencies benefit programs such as wage data from the Office of Child Support Enforcement and Social Security Access to State Records Online for Title II and XVI benefit entitlement, eligibility, and payment amounts.

## DATA EXCHANGE COMMUNITY OF PRACTICE

The Federal Data Exchange Community of Practice, with more than 30 participating agencies, has provided increased awareness of other agencies' experiences, programs, and best practices of data sharing services; a forum to discuss the workings and value of those programs; introduction to a network of individuals who manage those programs; and invaluable sharing of information that influences the data sharing programs of every agency.

The State Data Exchange Community of Excellence, through its collaboration with the 50 states, is simplifying and streamlining how states receive federal data used to administer income maintenance programs that assist the public. Members of both groups include policy makers from the executive and legislative branches of government, governor appointed state representatives, and leaders and private organizations dedicated to improve public service and the citizen experience through data sharing.

## DATA EXCHANGE HUB

The Executive Office of the President (EoP), National Economic Council (NEC), OMB, and HHS have expressed interest in developing an agreement that provides the flexibility to consider adding additional human service programs to the ACA HUB data flow.

We are working with HHS and CMS to effectuate an Information Exchange Agreement (IEA) between CMS and our agency that permits use of Social Security data for TANF and SNAP by November 30, 2016. We also expect to effectuate a model state IEA with three early-adopter states (PA, MT, and OR) by December 31, 2016. We will consider any legal provisions before adding additional human services programs, including subsidized childcare as we move forward.

## U.S. INTERAGENCY COUNCIL ON HOMELESSNESS

We are an active participant in the U.S. Interagency Council on Homelessness (USICH). The mission of the USICH is to coordinate the Federal response to homelessness and to create a national partnership at every level of government and with the private sector to reduce and end homelessness.

In collaboration with USICH, the U.S. HHS' Substance Abuse and Mental Health Services Administration, and the U.S. Department of Veterans Affairs (VA) developed a document outlining the following strategies to help people experiencing homelessness to apply for and receive SSI/SSDI benefits.

Key strategies include:

- Assisting People Experiencing Homelessness with the SSI/SSDI Application Process;
- Coordinating with SSA Field Offices, Community Organizations, and other Federal Agencies;
- Coordinating with Other Benefits and Entitlements;
- Working with Veterans and Other Special Populations; and
- Assisting SSI/SSDI Beneficiaries Post-Entitlement.

For more information, please visit Social Security's [Homelessness web site](#).

## CUSTOMER SERVICE ENHANCEMENTS

In support of Vision 2025, we are steadfastly committed to offering customers choices in how they conduct business with us, including in-person, phone, mail, and online. We recognize the growing customer demand for online service, and focus on adding more web-based options. These efforts also align with the President's Management Agenda and supporting CAP Goals, in particular, [the Customer Service CAP Goal](#) to "Deliver smarter, better, faster service to citizens." Below is a sampling of recent online service enhancements.

### INTERNET SOCIAL SECURITY NUMBER REPLACEMENT CARD (ISSNRC) APPLICATION

In November 2015, the agency launched the ISSNRC application which allows adult customers age 18 and over with a [my Social Security](#) account, a domestic mailing address, and a valid state ID or driver's license, to apply for a replacement Social Security card online.

The ISSNRC application fulfills "no change" (e.g., name or date of birth has not changed) replacement card requests, which will reduce foot traffic in field offices and allow representatives to focus on more taxing workloads and customers who need or want in-person service. The application also educates and informs the public about the limited and appropriate use of the card and actions they should take to protect their identity. Each year, we issue about 10 million SSN replacement cards in-person, of which more than seven million require no change to our records. Because we issue nearly two million replacement cards annually to those under 18 years of age, the potential universe of online replacement cards is about five million.

The ISSNRC application is currently available in 14 states (Arizona, Idaho, Iowa, Kentucky, Maryland, Michigan, Mississippi, Nebraska, New Mexico, North Dakota, Pennsylvania, South Dakota, Washington, and Wisconsin) and the District of Columbia, and we plan to expand to additional states in FY 2017.

When fully implemented, this online service will shorten wait times for the public in our more than 1,200 field offices across the country and allow staff more time to assist customers who have more complex service needs. In FY 2018, we expect to issue up to 1.5 million replacement cards through this safe and convenient online option. We have also contracted with the American Association of Motor Vehicle Administrators (AAMVA) to help continue our nationwide rollout through FY 2017.

iSSNRC aligns with the first pillar of **Vision 2025**, Superior Customer Experience, and supports the Agency Critical Priorities of enhancing online customer service and advancing customer engagement.

## CUSTOMER SERVICE CAP GOAL

The Customer Service CAP Goal was established in March 2014 to improve customer service across federal government agencies. Customer Service is one of 15 CAP Goals developed to support the Administration's management agenda. Our Acting Commissioner, Carolyn W. Colvin, serves as a Goal Leader for this initiative, along with Lisa Danzig, the Associate Director for Personnel and Performance at OMB.

The objective of the customer service CAP Goal is to increase public satisfaction and promote positive experiences with the federal government by making it faster and easier for individuals and businesses to complete transactions and receive quality services.

Staff from Social Security and OMB identified the high-level CAP Goal strategies after consulting with dozens of other federal agencies and external organizations.

Highlights of the plan include:

- An online and in-person network that federal employees anywhere can join and share ideas and tools for improving customer satisfaction;
- A nationwide award program for teams and individuals who excel at customer service; and
- A better way to improve transparency and measure customer satisfaction across the federal government.

To date, we have achieved significant progress on each of these strategies.

## I1099 APPLICATION

An SSA-1099 is a tax form we mail each year in January to people who receive Social Security benefits. It shows the total amount of Social Security benefits a beneficiary received in the previous year and is used to report Social Security income for tax filing purposes.

In FY 2015, we launched a secure online application that allows most of our beneficiaries to immediately view, print, save, and download their replacement form SSA-1099 using their *my Social Security* account at <https://www.ssa.gov/myaccount/>.

In building this application, we cut through the usual "red tape" of lengthy and sometimes inefficient systems development. Using an Agile approach and streamlined process, we released the application on an expedited schedule, in time for the FY 2015 tax season. As a result of this new self-help service, we received 60 percent fewer requests for these forms through other methods, such as calls and mail.

## POLICY IMPROVEMENTS

In the past year, we have made considerable headway in updating our policies to keep pace with changes in legislation, medicine, healthcare delivery, and technology; to simplify and streamline our policies; and to rely on evidence-based research and data when formulating our policies and procedures. For example, we are successfully



implementing numerous complex provisions from the Bipartisan Budget Act (BBA) of 2015, one of the largest pieces of Social Security legislation in decades, as well as the Achieving a Better Life Experience (ABLE) Act and the Supreme Court's decision to recognize same-sex marriages across the nation.

We published final regulations to simplify work incentive policies and to update the listings of impairments that guide our medical determinations of disability. In order to increase payment accuracy and prevent improper payments, we are leveraging our existing and new data exchange agreements to improve program administration and better serve our beneficiaries. In short, our policy accomplishments serve to modernize and improve our programs, while always remaining evidence-based.

## SNAPSHOT OF THE BBA IMPLEMENTATION

The BBA addressed the funding shortfall in the SSDI program, ensuring that the program can continue to provide workers with disabilities and their families the full benefits they have earned. The BBA included other important program changes to protect benefits, support economic security for disabled individuals, and pay accurate benefits. The Budget provides the funding needed to implement these changes as well as the fully authorized level of program integrity funding called for by the legislation.

We are pleased to report that as of October 5, 2016, 15 out of 24 of the agency's BBA provisions have been successfully implemented, and we are on track to implement the remaining nine provisions. We work cooperatively with OMB, and report monthly on our implementation plans, policy or regulatory approach, business processes, contractual support, IT, and budget needs, projections, and milestones.

See [Appendix F: Complete Listing of Bipartisan Budget Act Implementation Provisions](#), for a complete listing of all provisions.

## IMPLEMENTATION OF SAME-SEX MARRIAGE POLICIES

The U.S. Supreme Court issued a decision in *Obergefell v. Hodges*, holding that all states must permit and recognize same-sex marriage. As a result, we may now recognize same-sex couples as married in all states for purposes of determining entitlement to Social Security benefits and eligibility or payment amount for SSI. While we issued instructions shortly after the court's decision, we have spent the last year sorting through complex legal and policy challenges to ensure comprehensive instructions. We continue to work toward automating the new policy and finalizing rules related to child claims. For more information, visit our [Same-Sex Couples webpage](#).

## UPDATED THE LISTING OF IMPAIRMENTS

The listings are special rules that provide us with a mechanism to identify claims that we should clearly allow. In keeping with our focus on ensuring that our policies remain current with medicine, health care delivery, and technology, we published three comprehensive revisions and one targeted revision, which will complete 93 percent of the comprehensive body system updates and putting us on track to update all listings by 2020 with a three to five-year cycle of review.

## IMPLEMENTATION OF THE ABLE ACT

With the implementation of the ABLE Act, individuals who were blind or disabled prior to age 26 can create a new type of tax-advantaged account to fund disability-related expenses that has limited effect on the individual's eligibility for the SSI program and other federal means-tested programs.



## EXPANSION OF DATA EXCHANGE EFFORTS

We maintain over 3,100 current and new data exchange agreements with all levels of government to pursue data critical to reducing improper payments, decreasing administrative costs, and supporting other federal, state, and local agencies through a 'One Government' approach to provide data vital to their program needs.

Most recently, we obtained data from the DHS to conduct a study to determine if we can identify SSI recipients who leave the U.S. for 30 days or more to reduce one of the top ten causes of improper payments in the SSI program. We also established an ongoing data exchange with the Department of Education to provide data for student loan forgiveness, enabling approximately 387,000 DI recipients to have been deemed eligible to have up to \$7.7 billion in student loans discharged. Further, we initiated the first government Federal Data Exchange Community of Practice and State Community of Excellence to facilitate collaboration with federal and state governments about overarching data exchange challenges and opportunities.

## INFRASTRUCTURE: NEW DATA CENTER

We opened our first data center in 1980, the National Computer Center (NCC). Predictably, over the span of 30 years of operations many of the NCC's infrastructure systems were past their life cycle, and in FY 2009 Congress appropriated \$500 million to construct a new data center.

We used our appropriated funding to construct a new data center, the National Support Center (NSC), in Urbana, Maryland. The NSC is a modern, energy efficient facility that will meet the IT needs of the agency for at least the next twenty years. General Services Administration (GSA) successfully managed construction of the NSC. We completed the migration of equipment and IT processing to the facility in August 2016. The program, though complex and challenging, was completed on schedule and under cost.

In addition to the NSC, we also have a second data center, the Second Support Center (SSC), located in Durham, NC. Together, the NSC and SSC are co-processing data centers, each with full failover capabilities.



The NSC is a state-of-the-art facility housing modern and efficient equipment and technologies. The data center has received numerous accolades, including:

- Winner of the GSA 2016 Design Excellence Award in Engineering
  - Winner of the 2015 Government Information Technology Executive Council's Project Management Excellence Award
  - Featured participant in the Department of Energy's Better Buildings Challenge
  - A leading example and participant in the Data Center Optimization Initiative
  - Leadership in Energy and Environmental Design (LEED) Gold Certified
- Some noteworthy NSC building design efficiencies and best practices include:
- Best in class uptime and reliability – Uptime Institute certified the NSC at Tier Three.
  - Instant-on LED lighting throughout the complex
  - Modernized cooling systems for IT equipment
  - Energy efficient equipment throughout facility
  - Solar heated water, rainwater reclamation, free cooling 200 days per year (under 55 degrees)
  - Indigenous grasses - less mowing - reduces fuel costs and air pollutants

## DATA-DRIVEN DECISIONS: ANALYTICS CENTER OF EXCELLENCE (ACE)

We established the ACE in July 2015 to expand our capability to use advanced analytics techniques to unlock the power of our data to drive strategy and performance, improve our business processes, and improve our service to our customers. We recognized the need to get more value from our vast data assets and use them to drive how our agency makes decisions and sets policies.

ACE, a component of the Office of the Chief Strategic Officer (OCSO), is a centralized group of highly skilled resources that offers a wide spectrum of data analytics services.

ACE seeks to nurture and promote a culture of evidence-based policies and decision-making across the agency. ACE will accomplish its mission by offering five core services that will:

- Assist with increasing agency analytics competency and capabilities; and
- Deliver actionable analytics through collaborating with business owners and technology experts to perform insightful analyses of agency data.

ACE uses advance data mining and analytical techniques and methods including natural language processing, text mining, scoring and optimization models, and predictive and prescriptive analytics to derive value-added insights from our data and promote innovation through advanced analytics. In addition, we developed critical priorities around data-driven decisions as part of our path to move forward to achieve our Vision 2025. We recently announced the Agency Critical Priorities and one amongst them is “Modernize our Information Technology and Accelerate Data Driven Decisions.”

## MANAGEMENT: ENTERPRISE PROGRAM MANAGEMENT OFFICE (EPMO)/IT INVESTMENT PROCESS (ITIP)

### EPMO

We established the EPMO to support our agency's mission-critical projects. By implementing the EPMO, we increase the opportunity for project success. Additionally, by providing expertise to projects across the agency, the EPMO provides more transparency, better alignment with agency goals, and earlier achievement of either success or failure, reducing the overall investment in projects that are not a success.

EPMO is an effective and innovative organization meeting the changing needs of our customers by delivering projects on time, within budget and scope, and through collaborative partnership with our stakeholders. EPMO supports the third pillar of Vision 2025, Innovative Organization.

We launched our EPMO service model in February 2016 – providing services on 50+ small, medium, and large engagements. EPMO is currently managing 10 efforts, such as the Altmeyer Modernization Project, Death Data Improvement (DDI), and Leadership Succession Planning.

On the DDI project, EPMO provided full project management support, as well as mentoring and coaching services, which had a measurable positive effect on managing timelines, resources, communications, and stakeholder engagement. EPMO also added value to the project through coaching and mentoring Office of Retirement and Disability Policy (ORDP) staff to benefit future phases of the project.

### ITIP

With many competing priorities, it is critical that we invest our IT resources wisely. Consequently, transforming how we manage and invest our IT resources has been one of our highest priorities. ITIP is our solution.

Consistent with the Federal Information Technology Acquisition Reform Act ([FITARA](#)), ITIP focuses on up-front project planning with outcomes tied to specific agency goals. Improved project planning and documentation will allow us to assess project costs and timelines with greater accuracy. In addition, an enterprise-wide executive IT investment board will meet throughout the year to make informed funding decisions on projects that provide the greatest benefit to our agency's mission. The development of ITIP aligns with the third pillar of [Vision 2025](#), Innovative Organization, and supports the Agency Critical Priorities.

As a result of ITIP, we will be better able to deliver the right project on time and within budget, and provide the best tools for our employees and superior service to the American public.

## **IT: AGILE/CLOUD**

### **AGILE PROJECTS**

We have implemented the Agile Lifecycle (ALC) for use in our work environment. Instead of long development timelines, Agile projects implement short, incremental development cycles called "Sprints" that establish a pattern of frequent delivery of defined portions of the final product. This incremental approach allows teams to demonstrate the capabilities of the emerging product to the user community ensuring alignment between users needs and the product team's efforts. Sprints also demonstrate the team's ability to reliably and predictably deliver deployed software.

### **AGENCY CLOUD INITIATIVE (ACI)**

Similarly, our ACI allows the Office of Systems to be more responsive to customers' requirements, and operate more efficiently while providing a quality infrastructure that achieves maximum performance from the server infrastructure. The Hybrid Cloud Environment will ensure the reliability, availability, and security of systems supporting our business units while optimizing servers, configurations, and processes for efficiency and cost effectiveness. The ACI provides a simple way to access servers, storage, databases and a broad set of application services over the internet, and maintain the network-connected hardware required for these application services, while we provision what our users require via web applications.

## **CYBERSECURITY**

Protecting our network and our information is extremely important to both our agency and to the public as we hold the Personally Identifiable Information (PII) of hundreds of millions of citizens and residents of the United States. We are pleased to report that our cybersecurity program continues to meet or exceed key government-wide performance standards. However, to remain strong, we need to continue to evolve our cybersecurity program to reflect changes in technology, changes to business processes, and changes in the complexity of internal or external threats. Continued investments in cybersecurity projects and initiatives will ensure we have the resources needed to accomplish our agency's mission and thus maintain public confidence in the agency's ability to protect their privacy. We are proud to share a number of initiatives, which reflect upon our diligent focus on cybersecurity.

### **PRESIDENT'S MANAGEMENT COUNCIL (PMC) CYBERSECURITY ASSESSMENT**

The PMC Cybersecurity Assessment was developed by OMB and the National Security Council (NSC) for agency Deputy Secretaries as an executive evaluation of their agencies' cyber-hygiene standards. Progress is reported quarterly and the results are used to inform management and support the adoption of the National Institute of Standards and Technology (NIST) Cybersecurity Framework. These assessments evaluate each of the five NIST Framework areas – Identify, Protect, Detect, Respond, and Recover – using select information from agencies' quarterly FISMA submissions. Agencies then receive an overall rating based on a composite of the five function areas. In FY

16 Quarter 33, our agency was the only one to have been rated as “exceeding government-wide target” in all five functional areas.

## CAP GOALS FOR CYBERSECURITY

These goals focus on the implementation of the continuous monitoring of hardware assets, software assets, configurations and vulnerabilities, the implementation of multi-factor authentication (MFA), and malware and anti-phishing defenses. Our agency meets all nine of the CAP Cybersecurity Goals.

## STRONG AUTHENTICATION FOR ONLINE SERVICES

Strong authentication is important in ensuring that individuals using our online services are able to do so securely. As part of the government’s focus on strengthening security for online services, President Obama signed an executive order (EO) on cybersecurity on October 17, 2014. The order focused on protecting citizens from identity theft and directed federal agencies to provide more secure authentication for their online applications. Specifically, the order requires multifactor authentication for any agency application that discloses personal information. In FY 2017, we will implement a change to *my Social Security* to meet the requirements in the EO. Individuals accessing their *my Social Security* accounts will enter their unique username and password, and as an added security feature, they will be required to enter a one-time numeric passcode. In order to ensure that our online services are available to a broad population of our users, we will send the numeric code to a mobile phone number or the email address provided by the individual when he or she established their account.

## DHS’ CONTINUOUS DIAGNOSTICS AND MONITORING (CDM)

CDM represents a new approach to identify, in near-real-time, deviations from an agency’s implemented security controls and enables more accurate and automated compliance reporting to OMB. At Social Security, we have been an early adopter of CDM tools and capabilities and meeting DHS’ milestones. We have aggressive timeframes to implement DHS’ CDM program to improve our continuous monitoring and cybersecurity posture. The incentive for success in this area is great because failure to do so could put our data and IT resources at greater risk for hackers.

## OUR CYBERSECURITY BEST PRACTICES

We are often asked to share some of our best cybersecurity practices with other federal agencies. The following section outlines some of those practices.

**Incident Response and our SOC:** We have a robust Incident Response Plan that details the roles and responsibilities of agency personnel involved in a response to a cyber-incident or breach. These roles include personnel from all facets of the agency, including our SOC. The agency has an internal SOC staffed without interruption that monitors the agency’s network environment to identify and detect suspicious activities, react to potential cybersecurity incidents, and ensure uninterrupted service delivery.

**Enterprise Penetration Testing Program:** One of our most effective information security defenses is our Enterprise Penetration Testing program, which we implemented in 2012. It has become a cornerstone of our cybersecurity program to defend against hacks and data breaches. Penetration testing is the method of evaluating the security of a computer system or network by simulating an attack from malicious outsiders who do not have authorized access to our systems and insiders who have some level of authorized access. The process involves analyzing the system for potential vulnerabilities that result from system misconfigurations and software flaws, both known and unknown. We have a dedicated team of cybersecurity professionals that performs tests in an attempt to “hack ourselves” on a scheduled and on-going basis. The penetration testing process provides us with a third layer of defense beyond our basic cyber hygiene practices of software patching and vulnerability scanning.

**Malware and Anti-Phishing Defenses:** Our defenses for malware and phishing are a critical component of our cybersecurity program and build on our layers of defense and risk based approaches. We take a holistic approach, incorporating malware and phishing defenses into the various layers of protections at the perimeter, network, end-point, data, prevention, and response layers. We deploy a variety of technologies to detect potentially malicious activity at our gateways to the external world as well as within our internal network. We configure our infrastructure and place controls on user activity to limit the impact of potentially suspicious actions. One of our best practices in this area is the implementation of an enterprise wide social engineering program that tests our employees' ability to recognize suspicious email messages and phone calls. We test all employees once a quarter with phishing exercises to continuously reinforce their skills.

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## ANTI-FRAUD PROGRAM

We have expanded the use of data analytics to enhance detection of transactions indicative of fraud. We apply predictive and rule-based models to our online services business processes; identify transaction anomalies and evolving patterns of activities in our workloads; and prevent transactions indicative of fraud from advancing. Our primary mission is to take the appropriate administrative actions and return the legitimate number holders' account to a pre-transaction state while stopping or recovering erroneous payments.

For FY 2016, we identified 36,684 transactions indicative of fraud. Through research and analysis, we identified 8,594 incidents highly indicative of a fraudulent transaction and referred 1,460 allegations to OIG. Using appropriate administrative actions defined in our program policy, we prevented and/or recovered \$11,524,554 in erroneous payments.

In addition, we continued to expand the Cooperative Disability Investigations (CDI) program—one of our most effective measures to guard against fraud. The CDI program links the OIG and local law enforcement with Federal and State workers to investigate suspicious disability claims before making a decision to award benefits—in effect, proactively stopping fraud before it happens. We currently have 38 CDI units covering 33 States, Washington DC, and Puerto Rico. Our total programmatic savings are \$269 million.

We have increased fraud prosecutions by hiring additional Social Security fraud attorneys. These attorneys serve as Special Assistant U.S. Attorneys dedicated to Social Security fraud. The goal of this initiative is to increase the number of prosecutions for crimes involving Social Security matters.

The Social Security Act authorizes the imposition of civil monetary penalties (CMP) to preserve the financial integrity of the program and to protect the public from schemes to mislead and otherwise defraud consumers. In FY 2016, OIG resolved 244 cases and imposed more than \$12 million in CMP against individuals who made false statements to us to retain Social Security benefits or payments.

## SECURITY AND EMERGENCY PREPAREDNESS

We have robust programs in place to ensure the safety and security of our employees and the public we serve, and to ensure there is no interruption of the services we provide to our customers.

### INCIDENT COMMAND CENTER (ICC)

The ICC, located at headquarters, is a state-of-the-art control center that ensures situational awareness of incidents affecting, or having the potential to affect, Social Security operations agency-wide. The ICC serves as the agency's central hub for the collection, analysis, and dissemination of security-related information to senior leadership. This



information assists in decision-making and enables us to promote the safety and security of our employees, visitors, and facilities throughout the country.

### **WORKPLACE AND DOMESTIC VIOLENCE PROGRAM**

In response to the April 2012 Presidential memorandum, Establishing Policies for Addressing Domestic Violence in the Federal Workforce, we established a national program, backed by policy and standard operating procedure, for reporting and managing workplace violence risk, including domestic violence, sexual assault, and stalking affecting the workplace. In January 2016, the Office of Personnel Management (OPM) recognized us as one of three “Promising Practices” agencies for making significant strides in implementing support to employees. Twenty Federal agencies have reached out to us for consultations and materials as they develop their own domestic and workplace violence programs.

### **ACTIVE SHOOTER AWARENESS PROGRAM**

With the significant increase in active shooter incidents in the last few years, we have leaned forward to educate our employees on actions they can take if such situations occur at our facilities. We currently have a training video on active shooter awareness that provides employees with information on actions they can take if they are involved in an active shooter situation. To ensure all employees receive training and know what they can do if confronted with an active shooter, we have developed mandatory annual training that our managers will deliver to their employees annually.

### **CONTINUITY OF OPERATIONS (COOP) PROGRAM**

Because of the importance of the service we provide to the American people, we do our best to ensure there is no interruption in service, even during a national emergency. We take our COOP responsibilities very seriously, achieving great success in the last two COOP exercises evaluated by the Federal Emergency Management Agency (FEMA). For the 2016 exercise, we achieved green scores across the board and received the highest score possible – 10 – from FEMA on our participation in the exercise.

### **PHYSICAL SECURITY COMPLIANCE AND RISK SURVEYS**

The safety of our employees and visitors is paramount. To enhance the agency’s security posture and reduce the risk of security incidents, we perform Compliance and Risk Surveys (CARS). These risk assessments identify the physical security countermeasures needed to protect employees, equipment, and the agency’s mission in our more than 1,500 offices. The surveys help us identify mitigation strategies to address numerous undesirable events, such as active shooters, vehicle-borne improvised explosive devices, insider threats, and workplace violence. To adapt to evolving threats and comply with federal standards promulgated by the Interagency Security Committee, we must complete an average of 350 CARS yearly.

### **PHYSICAL SECURITY SYSTEMS STANDARDIZATION AND SUPPORT SERVICES (PS5) PROGRAM**

We developed the PS5 program to reduce costs and improve risk mitigation. The PS5 initiative will modernize and standardize the electronic physical security systems installed in field and hearing offices. By replacing outdated and sometimes non-functional security equipment, and leveraging integration and advances in security technology, PS5 will enhance the safety and security of employees and the public. In FY 2017, we will install PS5 equipment in 90 field and hearing offices and complete 30 security designs for future installations.

**INSIDER THREAT PROGRAM**

The Insider Threat Program works to deter possible threats to the agency. These threats include espionage, terrorism, violent acts against the government, unauthorized disclosure of national security information, or the loss or degradation of agency resources or capabilities. OSEP chairs the Insider Threat Hub, a closely coordinated group of stakeholders from human resources, information technology, legal, and security fields that collectively analyze and respond to insider threat concerns.

# BUDGET OVERVIEW

## FY 2017 BUDGET OUTLOOK

### FY 2017 PRESIDENT'S BUDGET - \$13.067 BILLION

The President's Budget would provide funding to improve service to the public. With full funding of the President's Budget, we can do more work to reduce backlogs and processing times. This funding level would allow us to dedicate resources to both service delivery and program integrity activities.

The President's Budget would allow us to maintain normal service hours to the public in our offices, improve overall service in field offices, and reduce wait times and busy signals on our National 800 Number Network. It would allow us to continue to hire more ALJs and support staff to execute our Compassionate and Responsive Service (CARES) plan and complete more continuing disability reviews (CDR) and SSI non-medical redeterminations. Additionally, the FY 2017 President's Budget will further our expansion of IT tools, bring about more streamlined services for the public and secure our vital networks.

The President's Budget also fully funds the dedicated program integrity efforts required in the 2015 BBA, providing \$1.819 billion for efforts that ensure that beneficiaries continue to meet our strict disability criteria.

Overall, the President's FY 2017 Budget Request for our agency will improve our customer service and ensure that Americans can get their questions answered, get help applying for Social Security benefits, and receive the benefits they have earned without delay or errors. The FY 2017 budget is pivotal to strengthening our services and positioning us for the future.

### FY 2017 CONTINUING RESOLUTION (CR)

The current CR includes an across-the-board cut of .496 percent, which if annualized, would provide us with \$11.959 billion for operational expenses, a \$53 million cut from our base FY 2016 level.

The CR is forcing us to make very tough choices in order to continue to serve the public. We are operating conservatively and delaying critical decisions until we receive full-year funding. We have:

- An agency-wide hiring freeze;
- Extremely limited overtime for critical work processes, program integrity, health and safety, emergencies, and system upgrades only. In FY 2016, we used about 1,900 workyears of overtime, and normally we use about 2,800 to 3,200 workyears of overtime. Overtime is essential to balancing service and program integrity work. We can only afford about 600 workyears for FY 2017, if we receive a yearlong CR at the current level with the across-the-board reduction;
- Restricted funding for all other costs, such as mission-critical training and travel, which includes travel for our claimants and attorneys, as required by law. Travel has been cut to an all-time low from about \$64 million in FY 2010 to only \$23 million projected for FY 2017; and
- IT funding is at the lowest level since FY 2012.

The CR will cause further service degradation, as we are already in a fragile state. Our ability to balance service and stewardship will be limited, and we will have to make difficult choices in prioritizing workloads. In fact, we may need to furlough later in the fiscal year if the CR continues. If we have to operate at a rate below FY 2016 and absorb our inflationary cost growth of over \$300 million:



- We would need to extend the hiring freeze for the remainder of FY 2017. Field office customers will face longer wait times in offices and the time it takes to schedule an appointment will increase. In addition, it will be difficult for field representatives to process cost-effective program integrity work;
- Wait times on our National 800 Number Network will continue to increase as tele service staffing would decline, and people were already waiting over 13 minutes to speak to an agent at the end of FY 2016. The number of call agents could decrease to a level that exposes us to significant service degradation. We would expect our Agency Busy Rate (ABR) to double from 7.5 percent in FY 2015 to over 15 percent in FY 2017. Similarly, our Average Speed of Answer (ASA) would increase from approximately 10 minutes in FY 2015 to over 18 minutes in FY 2017;
- Backlogs in our Program Service Centers (PSC) will continue to rise. Under a full-hiring freeze with little overtime, pending cases in the PSCs will climb dramatically in FY 2017—as of September 2016, there were approximately 3.5 million actions pending. These cases will age further and result in multiple follow-ups from the public. Delays in overpayment actions and benefit adjustments lead to an increase in improper payments and can negatively affect the public, especially for people who have no other source of income;
- The DDS offices also are facing challenges. In a hiring freeze, we can expect to lose over 10 percent of our employees in the DDSs. On top of their work, the BBA will add 600,000 more physician medical reviews and increase the number of cases requiring medical documentation review, at a time when we will have fewer staff on board. The DDSs will also continue to process a high level of CDRs in FY 2017, as we continue our effort to eliminate the CDR backlog;
- Our CARES plan, which would reduce the hearings wait time to 270 days, will be delayed, as we would fall short of hiring needs for ALJs and support staff. Presently, the current wait time for a hearing decision is almost 542 days. It is a moral imperative that we continue to make progress in this area. Even at shorter wait times, families have lost homes as they fall behind in mortgage payments, disabling conditions have deteriorated because claimants cannot pay for medical treatment, and in worst-case scenarios, individuals have died while waiting for a hearing decision. With more than one million people waiting for a hearing decision, it is vital that we have the capacity to process more hearing decisions to prevent the financial and medical hardship associated with delays in the hearings process;
- To manage the challenges we face under reduced funding levels, we may need to consider further reducing field office hours to the public and possibly explore field office closures and consolidations; and
- There would be no funding for IT development and modernization to make us more efficient. Deep cuts in our IT funding would result in the possibility of interruptions in service and loss of productivity.

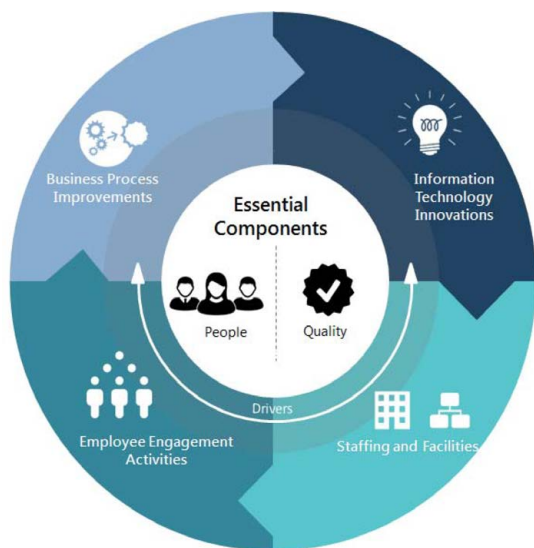
## CHALLENGES WE FACE

In the current fiscal climate, we will face many challenges in the new fiscal year and those that follow. Aside from tighter budgets, we also are experiencing growing workloads, increased scrutiny from Congress, and a loss of institutional knowledge.

Our most critical challenges are not new, and each year we focus our resources and efforts to meet those challenges head on and make as much progress as possible given our limited budget. Some of our most critical challenges include: reducing the number of pending disability cases at the hearing level; reducing improper payments; modernizing our IT legacy systems; continuing to create a superior customer experience; managing our human capital with growing workloads and shrinking budgets; keeping pace with the serious threat of cybersecurity; and ongoing legislative and regulatory issues. In addition, although not we do not bear the lead responsibility for ensuring the solvency of the Social Security trust funds, we would point out the critical need for Congress and others to act in this regard.

Following are detailed descriptions of some of our most critical challenges.

### PENDING DISABILITY CASES/HEARINGS



We are facing a significant public service crisis in our hearings and appeals process. At present, and for the first time in our history, more than one million people are waiting for a hearing decision. The situation is urgent. Our ability to decrease the number of hearings pending, reduce the average wait time for a hearing, and significantly improve our service to these claimants requires adequate and sustained funding. In addition to the necessary funding, we are committed to continue to use data analysis, to listen to our employees and partners, and most importantly, to remain dedicated to providing a high quality, modern and timely disability appeals process now and into the future.

These challenges require both immediate tactical initiatives to address the over one million cases pending a hearing, and initiatives to ensure the hearings and appeals process is efficient, effective, and sustainable.

Our plan for **C**ompassionate **A**nd **R**esponsive **S**ervice (CARES) outlines our current comprehensive and multi-layered approach to deal with the immediate crisis of the growing number of hearings pending and increasing wait times. It will also help to serve as a foundation to explore potential future initiatives, as we continue our efforts to identify ways in which we can better serve our customers.

### REDUCING IMPROPER PAYMENTS

We continue to identify and prevent improper payments and fraud by using our data in new ways to identify anomalies, and by using data from government agencies and the private sector. We have identified several leading causes of improper payments as outlined below and possible ways to combat these issues:

## COMBATING THE LEADING CAUSES OF IMPROPER PAYMENTS

### Wages

- BBA 824 (use of electronic payroll data) – We are working to define a business process that will allow SSSA to establish electronic exchanges with payroll data providers to administer the DI and SSI programs and reduce improper payments; the provision also authorizes us to require claimants to provide authorization to obtain payroll data. We reached stakeholder consensus on the scope of the authorization and are developing budget estimates. We plan to award a contract by July 2017.
- BBA 825 (treatment of earnings derived from services) – This provision permits us to count Title II wages as earned when paid in post-entitlement cases, thereby simplifying a number of processes related to work reporting and work incentives. We implemented BBA 825 in September 2016 with eWork systems changes and are now revising POMS and preparing IVT training.
- BBA 826 (electronic reporting of earnings) – Implementation of BBA 826 will provide an online option for DI beneficiaries and SSI recipients to report their earnings. We have AC concurrence on the business processes. Planning and analysis activities are now underway.

### Financial Accounts

We currently use the Access to Financial Institutions (AFI) process in SSI initial claims and high error profile redeterminations to confirm account balances in disclosed accounts and to detect undisclosed accounts.

- In March 2016, we implemented section 834 of the BBA, which expands the use of AFI in certain OASDI and SSI waiver requests to determine whether an individual without fault in causing the overpayment has the financial resources to repay it.
- We are working to automate the 834 process to ensure better consistency, linking it with efforts to automate the SSA-632 waiver form.

### Non-Home Real Property

- We are integrating third party data with the Modernized SSI claims System (MSSICS) to detect unreported non-home real property in the SSI program.
- We completed high-level requirements in FY 2016; development and testing continue in FY 2017 with test data to the vendor starting in October 2016.
- On track for implementation in September 2017.

### Absence from the U.S.

SSI recipients who leave the U.S. for a full calendar month or longer are ineligible for payments. We are working with the Department of Homeland Security, Customs and border Protection to conduct a study of its Arrival and Departure Information System (ADIS) data to determine whether it could help reduce improper payments in this area.

- We are finalizing a study plan and methodology; with help from the Dallas and San Francisco Regions, we will start case review to determine whether we can integrate arrival and departure data into SSI business process.

### Government Pension Offsets

Combined Windfall Elimination Provision (WEP) and Government Pension Offset (GPO) are the leading cause of overpayments in OASDI program. At OMB's direction, we submitted a comprehensive corrective action plan (CAP) to address the root causes of errors through training, policy clarification, and automation.

- In September 2016, we released just over 3,000 alerts to the PCs. These are actionable cases where either WEP or GPO appears to be missing for an individual who is dually entitled on his/her own record and the record of a spouse. We anticipate additional automation and training efforts in FY 17-18, resources permitting.

Additionally, we identified problems with the accuracy of our Death Master File (DMF), an extract of records for individuals reported as deceased. In 2015, OIG identified 6.5 million aged number holders who were likely deceased but were not in the Death Master File. Other agencies and companies rely on this data for death verification, creating a fraud risk.

One of the ways we combat fraud is with our CDI Program, one of our most successful anti-fraud initiatives. CDI units are collaborative, staffed with federal, state and local law enforcement (funded by us), and working closely with Assistant United States Attorneys in each state. CDI has contributed to a projected \$3.5 billion in savings for our disability programs. Today the CDI program consists of 38 units covering 33 states, the District of Columbia, and Puerto Rico.

However, we must have adequate funding to continue these efforts and to fulfill the requirements under The BBA of 2015 to have CDI coverage for all 50 States by 2022.

In addition, we must continue to find ways to fund IT projects that will save money while at the same time improve service and eliminate overpayments and underpayments. Many audits on improper payments result in unfavorable publicity on the Hill and in the media. Many of these improper payments would be eliminated with systems changes.

## MODERNIZATION OF IT LEGACY SYSTEMS

We face the challenge of determining how best to use technology to accomplish our mission within our budget and resource constraints. Our infrastructure is antiquated and cumbersome, resulting in inefficient business processes, increased training needs, and manual processes. We are facing numerous technology driven issues as we move forward in our service to the public:

- Current systems have insufficient storage and speed. As we transition to more web-based programming, the agency's network infrastructure must be more robust.
- Bandwidth is an impediment to rolling out forward-thinking initiatives, like soft phones and video service delivery. Quantum Leap WAN Modernization will build upon the existing network platform to provide the foundation for new IT tools that will transform the way SSA provides services to beneficiaries. Quantum Leap provides 100 Mbps bandwidth speeds for SSANet that will transform the way SSA provides services to beneficiaries.
- Hardware and software is not always compatible with current technology, leading to programs that are developed based on system capabilities rather than user needs.

Generally, our approach to modernizing our IT systems has been to replace components of systems rather than the system as a whole. This approach tends to reduce risk by reducing interdependencies in a single development effort and by reducing the scope of the modernization effort. For several years, we worked to modernize our IT in small pieces at a time, reducing our technical debt, but we have exhausted nearly all of these interdependent small efforts. This incremental and opportunistic approach worked well given the ebb and flow of annual funding. However, we are at a point where this approach is no longer viable; technology is advancing faster than we can incrementally modernize; tackling modernization of the intertwined legacy software requires a concerted effort sustained over several years.

Large-scale modernization of IT systems and infrastructure requires adequate, sustained funding. Our IT will continue to be an issue without budgetary commitment to a full-scale modernization effort. Our Chief Information Officer (CIO) testified before the House Ways and Means Committee, Social Security Subcommittee on July 14, 2016, where he emphasized the importance of IT Modernization and the need for sustained funding. On August 29 2016, we hosted an interactive Congressional IT Day for House Ways and Means staff where we provided a roadmap of our IT Modernization plan, including detailed cost and schedule projections.

We continue to train staff in technologies deployed to support the agency infrastructure. For example, we have developed a Modern Development Environment (MDE) consisting of the programming tools required to develop

modern, service-based, elastic, and scalable applications. The MDE approach is in place on several mainstream development projects and is the basis for our first modern product: Disability Case Processing System (DCPS). DCPS will bring uniformity across the 54 disparate state DDS systems now in place. This product will result in a system built using agile and MDE methods, developed in a modern programming language, and deployed in the cloud.

At the same time, we have a continued need to maintain that current IT skill set while expanding our service capability for planned and future technologies. This forward-looking approach to human capital is key for acceptable operations. Repeated hiring freezes, while employees continue to retire, gives us a smaller workforce to maintain legacy systems. This is becoming increasingly difficult to do while moving forward with IT modernization efforts. There needs to be continued emphasis to overcome this challenge and successfully manage the change from a staffing, skill set, and organization perspective.

## HUMAN CAPITAL MANAGEMENT

### INCREASING WORKLOAD

According to a [GAO analysis](#), we can expect retirement and disability beneficiaries to increase by 29 percent from 2014 to 2025, resulting in a significant demand on our services, employees, workloads, and infrastructure\*. In FY 2016, we received over 5.5 million retirement and survivors insurance applications and 2.6 million initial disability claims. At the same time, one-third of SSA employees are projected to retire between now and FY 2020. This represents a loss of intellectual capital, which may result in a workforce talent shortage and an inability to meet customer needs.

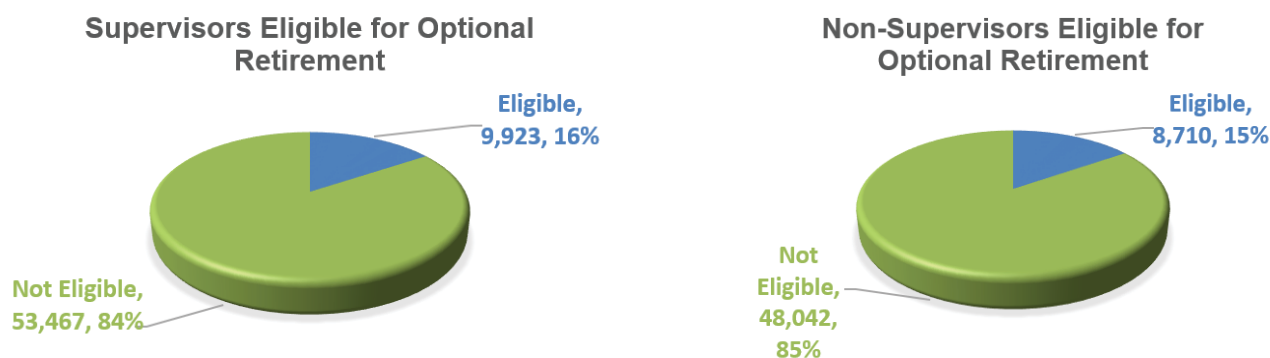
We must ensure that our leadership development and selection processes are cost effective and result in outstanding leaders being appointed to leadership roles. As we know, outstanding leaders have the ability to inspire the people they lead, resulting in more and better public service with fewer full-time equivalents (FTE) necessary to perform the same amount of service.

### LOSS OF INSTITUTIONAL KNOWLEDGE

We face a challenge with losing institutional knowledge because of ongoing losses of employees through retirement. As of September 30, 2016, approximately 16 percent of SSA employees were eligible for retirement. We estimate that 20 percent of permanent employees will be eligible to retire by 2020, and their retirement could result in various mission-critical skills gaps. Hiring freezes also adversely affect our ability to build a steady pipeline of qualified candidates for key leadership positions across the organization. We have taken a deliberate and proactive approach to address this challenge using national and regional developmental programs to identify existing leadership bench strength to ensure continuity in key positions.

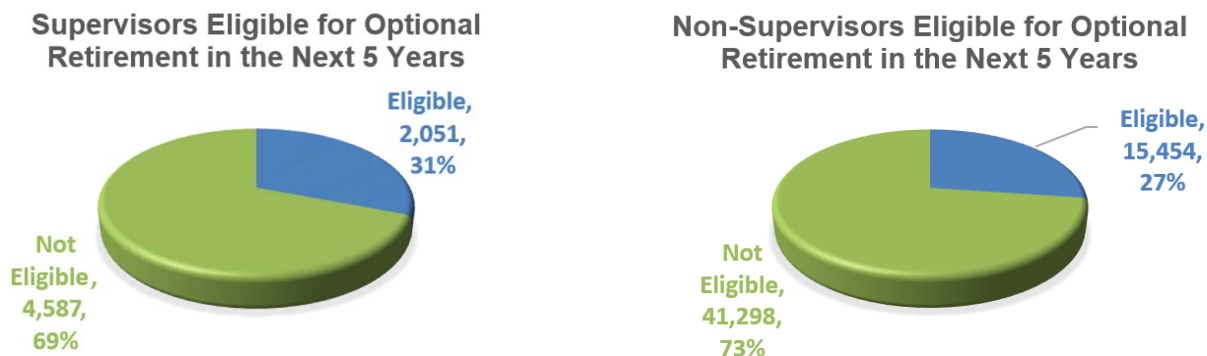
#### Retirement Eligibility

The following pie graphs show supervisors and non-supervisors eligible for optional retirement.



Note: Data as of 9/30/16 from Workforce at a Glance report.

The next set of graphs shows the number of supervisors and non-supervisors eligible for optional retirement in the next five years. Combined, approximately 27 percent of all employees will be eligible for optional retirement in the next five years.



*Note: Data as of 9/30/16 from Workforce at a Glance report.*

### HIRING FREEZE

We ended FY 2016 under a hiring freeze with limited exceptions. ALJs were excepted and we managed to hire 264 of them. Unfortunately, we were unable to hire the corresponding support staff for those ALJs, affecting our ability to issue decisions. At a 4.5-to-1 support staff ratio that that would need more than 1,100 staff. For the start of FY 2017, we are freezing both support staff and ALJ hiring. If the freeze continues and the Office of Disability Adjudication and Review (ODAR) is unable to hire in FY 2017, ODAR will not meet the FY 2020 average processing time goal of 270 days, and we would expect service degradation to continue.

### MEETING ALJ HIRING NEEDS

We value our partnership with OPM and are committed to collaborating in finding ways to improve the ALJ hiring process. In the past, we have participated in various workgroups to evaluate and improve the process. Recently, in late May 2016, we participated in a two-day innovation meeting at OPM. Currently, we are meeting with OPM on a bi-monthly basis to discuss the ALJ hiring process. We employ about 1,500 ALJs, 85 percent of all ALJs in the federal government.

For example, the ALJ hiring process focuses on adversarial and litigation-centered competencies when qualifying ALJs. However, our hearings are non-adversarial and require different skills. Based on our hard work with OPM and OMB in FY 2017, we hired 264 ALJs, exceeding our goal of 250 hires. Although this is a promising outcome, we must continue to work with OPM and OMB to improve the ALJ candidate rating process to ensure candidate ratings closely match the ability of the candidate to meet the standards we require at SSA.



## CUSTOMER SERVICE

### SERVICE DEGRADATION THROUGH FRONTLINE STAFFING LOSSES

As the population has aged, the demand for SSA services has grown substantially, yet frontline staffing has declined, creating unprecedented challenges to deliver the level of customer service the public expects and deserves. Until the agency replaces outdated, antiquated systems with a more modernized IT environment, Operations employees will still manually process the bulk of SSA's workloads, which requires maintaining an adequate staff on the front lines. From callers now waiting on hold for more than 13 minutes on the National 800 Number to one out of eight field office visitors waiting more than an hour, service delays are causing hardships for many vulnerable individuals, including veterans.

A great deal of work, including many actions that affect the amount of an individual's monthly benefit and the agency's overall payment accuracy rate, is not being processed, as an unprecedented 3.5 million cases are now pending in our Program Service Centers. Despite implementing efficiencies to work smarter and some limited automation of work processes as diminished agency funding allows, we rely heavily on our frontline employees to accomplish much of the work.

An already tenuous situation has worsened with the imposition of a hiring freeze. Hiring freezes and rising attrition rates make it difficult to recruit and retain dynamic, qualified individuals who have the talent and ability to succeed in the agency. The work at SSA is complex and most frontline, operational positions are technical in nature. It can take two to three years before a newly hired individual becomes proficient.

### BALANCING OUR WORKLOADS

In recent years, Congress has directed more resources to program integrity work. As a result, there are fewer resources available to handle other critically important work. The Office of Operations is handling an unprecedented amount of program integrity work this year, including 2.8 million SSI redeterminations of eligibility and 950,000 CDR.

The focus on program integrity workloads has decreased the resources available to process other important workloads, such as the processing of millions of retirement, survivors, disability claims, and post-entitlement workloads. As a result, backlogs have been created in certain parts of the organization, i.e. processing centers.

### UNPRECEDENTED GROWTH OF PROCESSING CENTER PENDING WORKLOADS

Since 2012, pending workloads have increased by three million actions. At the close of FY 2012, the total pending was over 1.7 million actions. At the end of FY 2016, over 3.5 million actions were pending.

There are several contributing factors to the upward trend in the pending workloads. The PCs process our most difficult and complex cases—ones that our field offices and claims processing systems cannot handle. Most of these cases require significant research and manual actions.

In addition, over the years, the PCs have experienced limited hiring and overtime and, in some years, hiring freezes. Most often, these losses come from our ranks of most experienced benefit authorizers through retirements and other attrition. Even when hiring is possible, the benefit authorizer training class is nine months, and it takes up to two years of on-the-job training and mentoring for individuals to become proficient. Additionally, the training and mentoring of this staff requires that we pull our more seasoned employees off their daily workloads.

### MEETING CUSTOMER EXPECTATIONS FOR ONLINE SERVICES

While the need for face-to-face or telephone service will always exist, in order to stay relevant, we must continue our efforts to meet the public's demands and serve them in the way they prefer. Our current electronic gateway needs to

be streamlined and simplified. We need to create products that satisfy a wide range of customer service needs. As our customers rely more on their ability to conduct SSA business online, the agency must ensure that any new features added to the suite of online services enhance the user's experience so that they can stay in the self-service channel to complete their business.

## **DELIVERING SERVICES WITH A SMALLER FOOTPRINT**

The government-wide reduce the footprint initiative requires us and all federal agencies to provide service in fewer and smaller brick and mortar buildings. We continue to review and evaluate our service delivery methods through Service Area Reviews, which is a process that establishes national guidelines to facilitate the review of field offices service areas they provide, and workload analysis. However, any discussion regarding the closing of a Social Security office is highly sensitive and must be balanced with our commitment to serving the public. We continue to look at potential co-locations with other agency components and with other government agencies, including the IRS. The GAO is currently conducting a review of our infrastructure and service delivery. The report will be published in spring 2017.

## **CYBERSECURITY**

Cybersecurity threat is one of the most serious national security, public safety, and economic challenges we face as a nation. The cybersecurity challenge in the Federal government as well as Social Security is not simply a technology issue. It is an organizational, people, and performance issue requiring creative solutions to address emerging and increasingly sophisticated threats and new vulnerabilities introduced by rapidly changing technology.

At Social Security, we seek to improve our cybersecurity program through ongoing information security awareness training at all levels of our organization, timely detection of the vulnerabilities and the threats which could affect our operating environment and the evaluation and testing of new technologies designed to combat the latest known threats. Within a cybersecurity environment that is in a constant state of change, we face a host of challenges. We have increased the amounts that we expend on our cybersecurity program over the last three fiscal years. However, as our resources become constrained due to a reduced budget and the loss of cybersecurity talent, we struggle to maintain and improve our vitally important cyber defenses and to protect the data that we maintain on all of our citizens.

## **KEEPING PACE WITH INCREASED THREATS**

As the cybersecurity threat level evolves and escalates, Social Security, like all organizations, must respond with newer and innovative defenses that improve our ability to respond quickly. In order to keep pace with these changes, our future cybersecurity program must include the use of more analytics tools to identify threats faster and the use of automation to respond and remediate incidents more quickly. This is a fundamental change in the way we have managed information security in the past. The technologies we have relied upon over many years are ineffective when it comes to identifying previously undetected threats making it increasingly imperative that we implement technologies that help us predict and detect new and previously undiscovered threats. We hope to achieve this capability through analytics and automation. Success in this endeavor requires that have a steady funding source and a cadre of talented staff who understand data science and the threat environment. Both of which are equally important and in a precarious standing in the coming year.

## **RECRUITING AND RETAINING CYBERSECURITY TALENT**

In support of the Cybersecurity National Action Plan, the Cybersecurity Act of 2015, and the National Initiative for Cybersecurity Education, we must expand our cybersecurity positions codes, update Agency Position Descriptions, analyze our gaps in cybersecurity certifications, and enhance our current cybersecurity workforce through training,



recruitment, retention, and skill gap analysis. While all these initiatives are important, compliance for these initiatives is only part of the larger issue we are facing in this area. We are experiencing an 8 percent attrition rate with a 1 percent hiring rate for our cybersecurity staff. Additionally, we are currently understaffed to implement mandated federal directives and new technology solutions to address cyber threats.

We are competing with the private sector for cybersecurity talent and are restricted by outdated civil service laws that make it difficult to attract and hire highly skilled Information Security (INFOSEC) personnel who can command a high salary with competitive benefits in the private sector.

## **AGING INFRASTRUCTURE**

The aging nature of our legacy applications poses a cybersecurity risk for products that are no longer supported. Outdated and especially unsupported IT increases our vulnerability to cyber threats. Outdated technology is harder to defend because it does not have modern defense capabilities. For more than 30 years, we have been predominantly a user of mainframes for our mission-critical systems. In order to have more flexibility, we have incrementally moved away from mainframe dependent applications to more web-based applications. However, in doing so, we increased the vulnerabilities of our legacy applications due to their increasing interaction with newer web-based environments. The strength of veracity of our Cybersecurity program is directly tied to IT modernization. The sooner we can move away from incremental development of our legacy systems to more agile and modern IT development of our infrastructure, the more we can invest in security tools and processes that address today's threat environment.

## **FOCUSING ON COMPLIANCE VERSUS RISK**

Cybersecurity in the Federal government has largely had a compliance focus versus a risk focus. Much of the current laws that we are required to follow stress compliance over the elimination of threats. Fortunately, we are starting to see initiatives that align with our risk based approach to cybersecurity. However, the change in this direction is slow and it is difficult to make great strides in adopting new technologies and processes while trying to address the traditional compliance approach that we are still evaluated against. One example is our compliance with Federal Information Security Management Act (FISMA) and the Financial Statement Audit. For the past three years, our OIG has determined that we have a "Significant Deficiency" condition. It is comprised of issues related to access controls, change management, threat and vulnerability management, and IT governance. While we make progress each year, each year brings new findings as the cyber landscape evolves and we must constantly balance our limited resources between compliance and addressing new vulnerabilities.

## **SOLVENCY**

### **BOARD OF TRUSTEES**

The Social Security Act established the Board of Trustees to oversee the financial operations of the OASI and DI Trust Funds. The Board is composed of six members. Four members serve by virtue of their positions in the Federal Government. The President appoints and the Senate confirms the other two members to serve as public representatives. The two Public Trustees positions will have been vacant for two years by the time the new Administration transitions.

## Current Board of Trustees Members

NAME	TITLE
<b>Jacob J. Lew</b>	Secretary of the Treasury and Managing Trustee of the Trust Funds
<b>Carolyn W. Colvin</b>	Acting Commissioner of Social Security and Trustee
<b>Virginia P. Reno</b>	Deputy Commissioner for Retirement and Disability Policy, SSA, and Acting Secretary, Board of Trustees
<b>Sylvia M. Burwell</b>	Secretary of Health and Human Services and Trustee
<b>Thomas E. Perez</b>	Secretary of Labor and Trustee
<b>Vacant</b>	Public Trustee
<b>Vacant</b>	Public Trustee

*\*Vacant positions previously held in 2015 by Trustees –Charles P. Blahous, III and Robert D. Reischauer*

## OASDI TRUST FUND SOLVENCY

The Social Security Trustees project that the OASI fund will be able to pay full benefits until 2035 and that the DI fund will be depleted in 2023, less than 10 years from now. The combined theoretical OASI and DI trust funds will be depleted in 2034. If Congress does not enact legislative change, scheduled tax revenues will be sufficient to pay only about three fourths of the scheduled benefits after trust fund depletion.

Policymakers have developed numerous proposals and options that have financial effects on the OASDI Trust Funds with the intent of addressing the long-range solvency problem. We have prepared memoranda for many of these proposals. Each memorandum provides an actuarial analysis showing the estimated effect on the financial status of the OASDI program. A complete list of the proposals and memoranda are available on our website.

Given the recent reallocation of funds from the OASI trust fund to the DI trust fund, the relative immediacy of the DI reserve depletion, and the size of the combined shortfall (approximately 2.66 percent of payroll), we expect Congress will continue considerable oversight of the DI program. The next Administration likely will be engaged in extensive discussions with the Hill about potential options.

## 2017 OASDI TRUSTEES REPORT

The Social Security Act requires that the Board, among other duties, report annually to the Congress on the actuarial status and financial operations of the OASI and DI Trust Funds. The 2017 report will be the 77th such report.

Our actuaries provide their expert input to the process each year, including recommendations, preparing the demographic, economic, beneficiary, and cost projections required for the report.

We will release this report at the end of March 2017, almost immediately after the change in Administration. The Trustees appointed by the next Administration, will be required to opine on the assumptions and methods used in the 2017 OASDI Trustees Report.

You can read the [2016 Trustees Report on our website](#).

# CONGRESSIONAL RELATIONS

Our Office of Legislation and Congressional Affairs (OLCA) serves as the focal point for all legislative, congressional, and regulatory activity for us. With the exception of the House and Senate appropriations committees, OLCA serves as the focal point of SSA's interactions with Congress.

Among other things, OLCA ensures that committees and committee staff are appropriately apprised of key agency developments; prepares agency witnesses for Congressional hearings; develops agency legislative proposals; and provides confidential, technical assistance to Committees, Members, and Hill staff.

OLCA assembles our agency's legislative proposals and promotes our agenda. It also incorporates approved agency legislative proposals into the broader framework of the President's annual budget. To the extent possible, OLCA provides extensive training and documentation on policies to ensure the agency complies and implements the policies on time.

## OVERSIGHT COMMITTEES

1. **Senate Finance Committee - Chairman Orrin Hatch; Ranking Member Ron Wyden.** Key issues: confirmation of nominees, solvency, the Disability Insurance (DI) program, ALJ hearings, improper payments, representative payees, Disability Case Processing System (DCPS), and service delivery.
2. **House Ways and Means Committee - Chairman Kevin Brady.** Key issues: Windfall Elimination Provision, solvency, improper payments, fraud.  
**Ranking Member Sander Levin** - Key issues: solvency, implementation of same-sex marriage Supreme Court decision, service delivery.
  - **House Ways and Means, Social Security Subcommittee - Chairman Sam Johnson.** Key issues: fraud in the DI program, IT modernization – getting rid of COBOL, implementing the Bipartisan Budget Act of 2015, representative payee program, DCPS, the DI program in general, SSA's implementation of NICS.  
**Ranking Member Xavier Becerra.** Key issues: service delivery, adequate resources and budget, benefit adequacy, the DI program.
  - **House Ways and Means Subcommittee on Human Resources - Chairman Vern Buchanan/Ranking Member Lloyd Doggett.** Key issues: the Supplemental Security Income program.
3. **Senate Homeland Security and Government Affairs Committee. Chairman Ron Johnson.** Key issues: Wisconsin hearing offices, SSA's death information.  
**Ranking Member Tom Carper:** SSA's death information, improper payments.  
**Senator James Lankford, HSGAC member:** The DI program in general, DI fraud, ALJs, the administrative appeals process.
4. **House Oversight and Government Reform Committee - Chairman Jason Chaffetz/Ranking Member Elijah Cummings.** Key issues: cybersecurity, FISMA, FITARA, ALJs, DCPS.
  - **HOCR Subcommittee on Information Technology - Chairman Will Hurd.** Key issues: cybersecurity and SSA's IT modernization efforts.
5. **Senate and House Labor HHS Subcommittee – Senate Chairman Roy Blunt/ Ranking Member Patty Murray and House Chairman Tom Cole; Ranking Member Rosa DeLauro** – Although SSA's budget comes primarily from the Trust Funds, the amounts allowed for administration are set by the Appropriations Committee and compete with other agencies under the Budget caps.
6. **Senate and House Budget Committees – Senate Chairman Mike Enzi/Ranking Member Bernie Sanders and House Chairman Tom Price; Ranking Member Chris Van Hollen.** The annual budget resolution sets the caps for funding of federal agencies.

## OTHER GOVERNMENTAL ENTITIES WITH SPECIAL INTEREST OR SUBJECT MATTER EXPERTISE

- Congressional Budget Office (CBO): CBO is the nonpartisan budget review office in the Legislative branch. CBO analysts review and offer alternative estimates to Congress regarding the President's Budget and the estimates we provide in our Congressional Justification.
- Government Accounting Office (GAO): GAO is the nonpartisan auditing and investigative arm of Congress. They have recently conducted audits regarding SSA's IT modernization plan and service delivery challenges.

## IMPLICATIONS OF CHANGES IN NEW CONGRESS

The elections could bring major shifts in Congress depending on which party controls the White House, the Senate, and House. In addition, some of the Chairs of Committees will change because Members have retired or sought higher office. We expect further clarity of the congressional outlook after Election Day.

## SOCIAL SECURITY ADVISORY BOARD

The Social Security Advisory Board is a bipartisan, independent federal government agency established in 1994 to advise the President, the Congress, and the Commissioner of Social Security on matters of policy and administration of the OASDI programs. The Board has seven members, with three appointed by the President, two by the Senate, and two by the House of Representatives.

For more information, visit the [Social Security Advisory Board's website](#).

### CURRENT SOCIAL SECURITY ADVISORY BOARD MEMBERS

CHAIR: HENRY J. AARON	
Member: Lanhee J. Chen	Member: Kim Hildred
Member: Bernadette Franks-Ongoy	Member: Barabara B. Kennelly
Member: Jagadeesh Gokhale	Member: Vacant

# APPENDICES INDEX

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## B. Biographies of Key Executives

- Acting Commissioner for Social Security
- Chief of Staff
- Executive Secretary
- Executive Counselor to the Commissioner
- Chief Actuary
- Deputy Commissioner for Budget, Finance, Quality, and Management
- Deputy Commissioner for Communications
- Deputy Commissioner for Disability Adjudication and Review
- General Counsel
- Deputy Commissioner for Human Resources
- Acting Inspector General
- Deputy Commissioner for Legislation and Congressional Affairs
- Deputy Commissioner for Operations
- Deputy Commissioner for Retirement and Disability Policy
- Deputy Commissioner for Systems and Chief Information Officer
- Chief Strategic Officer
- Regional Commissioner for Atlanta
- Regional Commissioner for Boston
- Regional Commissioner for Chicago
- Regional Commissioner for Denver and Seattle
- Regional Commissioner for Kansas City
- Regional Commissioner for New York
- Regional Commissioner for Philadelphia
- Regional Commissioner for San Francisco
- Senior Advisor Beatrice M. Disman
- Senior Advisor Greg Pace
- Senior Advisor Jane L. Ross

## C. Management Responsibilities and Contact Information for Key Executives

## D. Our Political Appointees

## E. Website Links

## F. Complete Listing of Bipartisan Budget Act Implementation Provisions

## G. Agency Critical Priorities for 2016-2017

## APPENDIX A: AGENCY ORGANIZATIONAL CHART

### HEADQUARTERS EXECUTIVES



**CAROLYN W. COLVIN**  
Acting Commissioner of Social Security



**DARLYNDA BOGLE**  
Executive Secretary Agency  
Transition Director



**STACY L. RODGERS**  
Chief of Staff



**JOE LOPEZ**  
Deputy Chief of Staff  
Backup Agency Transition  
Director



**FRANK CRISTAUDO**  
Executive Counselor to  
the Commissioner



**STEPHEN C. GOSS**  
Chief Actuary (ACT)



**MICHELLE KING**  
Deputy Commissioner  
Budget, Finance, Quality, &  
Management (DCBFQM)



**DOUGLAS K. WALKER**  
Deputy Commissioner  
Communications  
(DCCOMM)



**THERESA L. GRUBER**  
Deputy Commissioner  
Disability Adjudication  
& Review (DCDAR)



**ANDY LIU**  
General Counsel



**REGINALD WELLS**  
Deputy Commissioner  
Human Resources (DCHR)



**GAIL STONE**  
Acting Inspector  
General (OIG)



**JUDY CHESSE**  
Deputy Commissioner  
Legislation and  
Congressional Affairs  
(DCLCA)



**NANCY BERRYHILL**  
Deputy Commissioner  
Operations (DCO)



**VIRGINIA RENO**  
Deputy Commissioner  
Retirement and Disability  
Policy (DCRDP)



**ROB KLOPP**  
Deputy Commissioner  
Systems & Chief  
Information Officer (DCS)



**RUBY BURELL**  
Chief Strategic Officer  
(CSO)

The most current organization chart is available at: <https://mwww.ba.ssa.gov/org/ssachart.pdf>



## REGIONAL COMMISSIONERS



**ROSE MARY BUEHLER**  
Regional Commissioner  
Atlanta Region



**LINDA DORN**  
Regional Commissioner  
Boston Region



**PHYLLIS M. SMITH**  
Regional Commissioner  
Chicago Region



**SHEILA EVERETT**  
Regional Commissioner  
Dallas Region



**STANLEY FRIENDSHIP\***  
Regional Commissioner  
Denver Region



**MIKE KRAMER**  
Regional Commissioner  
Kansas City Region



**FREDERICK M. MAURIN**  
Regional Commissioner  
New York Region



**TERRY STRADTMAN**  
Regional Commissioner  
Philadelphia Region



**GRACE KIM**  
Regional Commissioner  
San Francisco Region

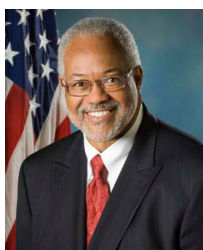


**STANLEY FRIENDSHIP**  
Regional Commissioner  
Seattle Region

## SENIOR ADVISORS



**BEA DISMAN**  
Senior Advisor



**GREG PACE**  
Senior Advisor



**JANE ROSS**  
Senior Advisor





## APPENDIX B: BIOGRAPHIES OF KEY EXECUTIVES

### ACTING COMMISSIONER OF SOCIAL SECURITY

#### CAROLYN W. COLVIN

On June 20, 2014, President Obama nominated **Carolyn W. Colvin** as the Commissioner of Social Security. Since February 14, 2013, Carolyn W. Colvin has served as the Acting Commissioner. Prior to this designation, she served as the Deputy Commissioner, confirmed by the United States Senate on December 22, 2010 as President Obama's nominee. In addition to her role as the Acting Commissioner of Social Security, Ms. Colvin serves as a Trustee to the Social Security Board of Trustees and a National Academy of Public Administration's Fellow.

Throughout her career, Ms. Colvin has managed programs that help people with their healthcare and financial needs. She previously held key executive positions at Social Security Headquarters: Deputy Commissioner for Policy and External Affairs (1994–1996), Deputy Commissioner for Programs and Policy (1996–1998), and Deputy Commissioner for Operations (1998–2001).

Prior to returning to SSA, Ms. Colvin was the Director of Human Services for the District of Columbia (2001–2003); the Director of the Montgomery County Department of Health and Human Services ([HHS]; 2003–2007); the Chief Executive Officer of AMERIGROUP Community Care of the District of Columbia (2007–2008); and, the Special Assistant to the Secretary of Maryland's Department of Transportation (2009–2011). In addition, Ms. Colvin served as the Secretary of Maryland's Department of Human Resources (1989–1994).

Ms. Colvin has received numerous awards and recognition for her managerial expertise and creativity. These awards include the Sun Magazine's 50 Women to Watch in 2014; the Innovations in Aging Leadership Award presented by the Maryland, Virginia and District of Columbia Departments of Aging (2012); the Clifford R. Gross Award for Outstanding Federal Government Public Service presented by the Maryland Chapter of the American Society of Public Administration (2012); Maryland's Top 100 Women Award from the Daily Record (2005); and the Women of Achievement Award from Suburban Maryland Business and Professional Women (2005). She has served on a variety of boards and commissions, including the National Committee to Preserve Social Security and Medicare.

Ms. Colvin earned her honorary doctorate, graduate and undergraduate degrees in business administration from Morgan State University. Additionally, she completed the Senior Executives in State and Local Government Program at Harvard University, the Maryland Leadership Program, and the Greater Baltimore Leadership Program. Ms. Colvin is from Maryland and currently resides in Anne Arundel County. She has one son and six grandchildren.



## CHIEF OF STAFF

**Stacy L. Rodgers** has a broad range of management experience in both the private and public sectors. Stacy brings more than 28 years of experience in working with Federal, state and local government agencies and non-profit organizations. She has successfully designed and implemented innovative human service programs and initiatives for municipal and state agencies.

In February 2011, Stacy was appointed by the Obama Administration and initially served as the Senior Advisor to the Deputy Commissioner of the Social Security Administration (SSA). In December 2014, Stacy became agency Chief of Staff, appointed by Acting Commissioner, Carolyn Colvin. Stacy also serves as the agency's Liaison to the White House.

Among her various duties Stacy provides senior oversight for day to day operations for the agency's more than 64 thousand member staff, over 1,400 field and hearing offices nationwide and 12 billion dollar operating budget. The agency serves over 65 million Americans, distributing over \$78 billion dollars in monthly benefits.

Stacy also represents the Agency on numerous federal interagency working groups, including the US Interagency Council on Homelessness, the Federal Re-Entry Council and the President's Management Council.

In February 2008, Stacy was appointed as the Deputy Secretary for Programs for the Maryland State Department of Human Resources, Maryland's human services agency. She oversaw the agency's 23 county departments of social services, the State's Child Support Enforcement and Public Welfare Programs and the Agency's Office of Grants Management. During her tenure as Deputy Secretary, Stacy worked to improve systems that ensure the delivery of timely and quality services.

Stacy earned a Bachelor of Arts Degree in Psychology from the University of Maryland, Baltimore County, and a Master's Degree in Public Administration from the University of Baltimore. She is also a graduate of the Harvard University John F. Kennedy School of Government Executive Leadership Institute, the National Forum for Black Public Administrators' (NFBPA) Mentor Program and Executive Leadership Institute.

Stacy's passion for service also extends beyond the workplace. Stacy contributes her time, resources and talents to numerous faith and civic organizations including the Providence Baptist Church where she is a dedicated member. She is a national board member of the NFBPA and serves as dedicated mentor and resource person for young professionals.

Stacy's personal mission statement is very simple: "To serve and help those in need".



## DEPUTY CHIEF OF STAFF

**Mr. Lopez** is an experienced leader who has gained a broad perspective of the Social Security Administration (SSA) through the various leadership roles he has held in Headquarters, Regional Office and Dallas Region Field Offices. Mr. Lopez currently serves, as the Deputy Chief of Staff in the Office of the Commissioner, SSA. Previously, he was a participant in the Senior Executive Service Candidate Development Program (SESCDP) and served in leadership roles as Senior Advisor to the Acting Commissioner and Chief of Staff, Acting Deputy Associate Commissioner in the Office of Applications and Supplemental Security Income Systems (OASSIS). Prior to his selection to the SESC DP, Mr. Lopez served as Area Director for Dallas Region, Area I, encompassing the state of Arkansas and northern Oklahoma. He also served as Area Director for Area II, the state of Louisiana, and Area V, north Texas. Mr. Lopez completed an assignment in the Office of Public Service and Operations Support as the Human Resources Management Staff Director, where he led various national key initiatives and projects.

Mr. Lopez began his career as a Claims Representative in El Paso, TX. He then moved on to Regional Training Center Instructor in Dallas, TX. Later, he served as Operations Supervisor, Assistant District Manager, District Manager, Project Manager in the Center for Programs Support and Center for Disability, and Deputy Director and Acting Director in the Center for Programs Support.

In addition to these positions, Mr. Lopez has participated in various national workgroups such as the Non-Disability Appeals Cross-Component Workgroup, Field Office Staffing Allocation workgroup, Co-Lead of the national workgroup to rewrite Field manager position descriptions, and Leading by Example: Relationships Matter workgroup.

Mr. Lopez has received numerous awards throughout his career including the Commissioner Citation, Deputy Commissioner Citations, and Regional Commissioner Citation. He is a graduate of the University of Texas El Paso.



## EXECUTIVE SECRETARY

As Social Security's Executive Secretary, **Darlynda Bogle** performs a variety of high level, sensitive, and complex duties requiring involvement in substantive matters and in policy, program, and operational areas. She is also responsible for providing executive leadership, direction, and coordination of the Office of Executive Operations, and directs the review of documents for the attention and approval of the Commissioner and Chief of Staff. She facilitates the proper integration of Agency decision-making by ensuring that all components are aware of priorities, initiatives, and issues.

Since May 2016, Darlynda has also served as SSA's Transition Director, overseeing the agency's efforts in preparation for the 2016 Presidential Transition.

Darlynda began her career at Social Security in May 1989 as an attorney in the agency's Office of General Counsel. In her first several years, she took on varying leadership positions in policy and program departments, including an eight-year stint during the 1990s in the Commissioner's Office, where she helped lead the agency's work in support of Vice President Gore's Reinventing Government Initiative. In July 2003, Darlynda moved to the Office of Communications, leading product development (videos, publications, web messaging) for several national marketing campaigns. In March 2010, Darlynda became Director of the agency's Transparency and Citizen Engagement team, leading efforts to carry out President Obama's Open Government Initiative. In September 2013, she accepted her SES appointment as Deputy Chief Strategic Officer, where her primary responsibility was to help drive short and long-term strategic planning and innovation; advance performance improvement; and facilitate open and transparent communications and operation. Darlynda moved to the Executive Secretary position in June 2015.

Darlynda lives in Columbia, Maryland with her husband, David. They have three adult sons, and one grandson. Darlynda is a proud alumna of the University of Michigan, where she earned both her bachelor's and law degrees, and ran on the university's first Women's Varsity Track and Field Team.



## EXECUTIVE COUNSELOR TO THE COMMISSIONER

**Frank Cristaudo** serves as the Executive Counselor to the Commissioner of Social Security. With a \$12 billion budget and 65,000 employees serving in more than a thousand offices across the country and around the world, the Social Security Administration (SSA) issues to 65,000,000 people each year almost a trillion dollars in payments, nearly 25% of the Federal budget. More than 40,000,000 customers visit SSA offices for service annually and more than 30,000,000 customers speak with SSA customer service representatives by telephone. Previously, Frank held a number of positions with the agency including Chief Administrative Law Judge. As Chief Judge, he led a workforce of 9,000 including more than 1,400 Federal Administrative Law Judges (ALJs), one of the largest judicial systems in the world. He also served as the agency's Chief Counsel for the Boston Region. Frank is a frequent lecturer on leadership, ethics, professionalism, and disability adjudication, and is the author of internal SSA publications "27 Practices for Effective Leadership in Public Service" and "The Vocational Expert Manual: The Use, Questioning, and Testimony of Vocational Experts."

He is a graduate of Columbia University's Persuasion: Influencing Without Authority, Harvard University Kennedy School's Driving Government Performance: Leadership Strategies that Produce Results, the Federal Executive Institute's Leadership for a Democratic Society, and the Center for Creative Leadership's Developing the Strategic Leader programs.

Prior to his appointment as an ALJ, Frank practiced law and successfully argued a number of Social Security cases before the Court of Appeals for the Third Circuit. He also served as the Chief Counsel for a municipality, as a Municipal Court Judge, and as an instructor at LaSalle University and Rowan University. He has a B.A. from McDaniel College and a J.D. (cum laude) from Widener University School of Law.



## CHIEF ACTUARY

**Steve Goss** is currently Chief Actuary at the Social Security Administration. He directs work on estimates of the future cost and income of the Social Security program under both present law and possible legislative changes. He also directs work on the development of economic, demographic, and revenue projections that underlie projections for Social Security, Medicare, and other programs.

Mr. Goss joined the Office of the Chief Actuary in 1973 after graduating from the University of Virginia with a Master's Degree in Mathematics. He graduated from the University of Pennsylvania in 1971 with a bachelor's degree in mathematics and economics. He has worked in areas related to health insurance as well as pension, disability, and survivor protection.

Mr. Goss has written articles and actuarial studies on several topics and has made presentations and participated in panel discussions at numerous conferences. He has worked closely with members of the executive branch, members of congress and their staff, and numerous commissions, as well as with private organizations.

Mr. Goss is a member of the Society of Actuaries, the American Academy of Actuaries, the National Academy of Social Insurance, the Social Insurance Committee of the American Academy of Actuaries, and the Social Security Retirement and Disability Income Committee of the Society of Actuaries.





## DEPUTY COMMISSIONER FOR BUDGET, FINANCE, QUALITY, AND MANAGEMENT

**Michelle King** was named the Deputy Commissioner for Budget, Finance, Quality, and Management (BFQM) in June 2016. In this role, Michelle serves as the agency's Chief Financial Officer and is accountable for an over \$940 billion program budget and an over \$11 billion administrative budget. Michelle is also responsible for providing executive leadership for the following agency programs and operations: acquisition and grants; anti-fraud programs; audit liaison; budget; financial policy and operations; facilities and supply management; media management; quality improvement; quality review; and security and emergency preparedness.

Michelle has served in several leadership capacities in BFQM. Prior to her current appointment, Michelle was the Acting Deputy Commissioner for BFQM from November 2015 to her current appointment and Acting Assistant Deputy Commissioner from May 2015 to November 2015. She also previously served as the Associate Commissioner for the newly established Office of Anti-Fraud Programs (OAFP). In this role, Michelle provided executive oversight and accountability for SSA's anti-fraud initiatives. Michelle was responsible for implementing the agency's anti-fraud framework, providing a comprehensive approach to agency fraud detection and prevention, and aligning agency efforts with industry standards. Michelle served as the Deputy Associate Commissioner for the Office of Budget, prior to joining OAFP.

Michelle has also held various senior executive leadership positions throughout the agency including Associate Commissioner for the Office of Income Security Programs in the Office of Retirement and Disability Policy and in the Office of Public Service and Operations Support in the Office of Operations.

Michelle was hired by SSA as a bilingual Claims Representative in 1994 and worked in the Sterling, Illinois field office until 1998. She then served at SSA headquarters as a Program/Management Analyst formulating and executing Operations budgets, where she subsequently advanced to the positions of Supervisory Management Analyst, Senior Budget Advisor, and Director of the Division of Resource and Management Information in the Office of Operations. Michelle served on assignment as the Acting Deputy Associate Commissioner for Regional Operations (ARC-MOS) in the Kansas City Region. In 2007, Michelle was appointed to the Senior Executive Service as the Deputy Associate Commissioner of Public Service and Operations Support. Michelle was the lead Executive for the Ready Retirement initiative from 2007 – 2009 developing the agency's online retirement, disability, and Medicare application, iClaim. The Ready Retirement initiative also focused on educating the public about filing for benefits and policy simplification.

Michelle earned her Masters of Public Administration (MPA) from Northern Illinois University in 1997 with a concentration in Public Policy and Organizational Development. She graduated cum laude with a dual BA in Political Science and Public Administration from Augustana College in Rock Island, Illinois in 1993 and earned a minor in Speech Communications.

Michelle has an Executive Leadership certificate from American University. She is also a graduate of the Duke Executive Leadership and Federal Executive Institute's Leadership in a Democratic Society programs.

Michelle is a sustaining member of the Junior League of Baltimore and involved in many community service projects and initiatives. She is also an avid physical fitness enthusiast and enjoys cycling, swimming, and running with her Golden Retriever, Wrigley. Michelle resides in Columbia, MD.



## DEPUTY COMMISSIONER FOR COMMUNICATIONS

**Douglas K. Walker** is the Deputy Commissioner for Communications, where he directs SSA's external and internal communications activities nationwide. He is responsible for planning and coordinating the agency's relationships and communications with other Federal agencies, State and local governments, special interest and advocacy groups, and the general public.

Mr. Walker has a broad background in association and public sector relations, government relations, marketing and outreach, with expertise in message development, digital marketing, and crisis management and communication.

Prior to his appointment with SSA, Mr. Walker was the Executive Vice President for Operations at Integrated Media, Inc. From 1999 to 2012, Mr. Walker held several positions at the National Education Association. His Federal sector experience includes communications positions with the U.S. Office of Personnel Management (1993-1998) and the Department of Labor (1999), as well as staff positions in the U.S. House of Representatives and the U.S. Senate (1987-1990).

Mr. Walker earned a Bachelor's Degree in Communications from Howard University and completed the Senior Executive Fellows program at Harvard University's John F. Kennedy School of Government.





## DEPUTY COMMISSIONER FOR DISABILITY ADJUDICATION AND REVIEW

**Theresa Gruber** was named the Deputy Commissioner for the Office of Disability Adjudication and Review (ODAR) in July 2015. In this role, she is responsible for providing executive leadership for the agency's hearings and appeals functions, overseeing an organization of over 10,000 employees.

Theresa began her career with the Social Security Administration in 1991 in

the Edina, Minnesota Field Office. She advanced through various programmatic, technical, and management positions including Claims Representative, Assistant District Manager, Acting Assistant Regional Commissioner, and Assistant Deputy Commissioner.

In January 2011, Theresa was named the Assistant Deputy Commissioner for the Office of Operations. She assisted the Deputy Commissioner in providing executive leadership for the agency's largest organization. The Office of Operations and its over 47,000 employees serve as the primary contact between the public and the agency. Nation-wide, the organization includes 10 regional offices, 54 area director offices, 1257 field offices, 33 teleservice centers, and 8 processing centers.

In June 2014, Theresa was named the Chief Program Officer for DCPS. In this role, she served as the single accountable executive for delivery of the Disability Case Processing System.

During Theresa's 20-year career, she has provided exemplary leadership and public service. Theresa previously served as the Assistant Deputy Commissioner for ODAR. Her major accomplishments include overseeing the reduction in the ODAR disability hearings backlog. She provided key leadership for the development and implementation of the agency's Internet-based services used by the public to conduct business with Social Security and assisting with the development of RSI and SSI programs. Theresa also played a critical role leading the implementation of the electronic disability process.

Theresa has received many awards during her career, including citations from the Dallas and New York Regional Commissioners, two Deputy Commissioner Citations, and a Commissioner's Citation for her leadership in the implementation of the electronic disability process nationwide. Theresa holds a Bachelor of Arts degree from St. Mary's University of Minnesota.



## GENERAL COUNSEL

**Andy Liu** joins the Social Security Administration from Crowell & Moring, where he was a partner and member of the Steering Committee in the firm's White Collar & Regulatory Enforcement Group, as well as a partner in the firm's Government Contracts Group. He also co-chaired the firm's False Claims Act practice. Andy's practice focused on representation of corporate and individual clients in all phases of criminal and civil matters including internal and government investigations, compliance counseling, False Claims Act litigation and other complex civil litigation and criminal proceedings.

In addition to his 17 years in private practice, Andy also spent several years as a Trial Attorney with the United States Department of Justice's Civil Rights Division where he handled cases under a variety of federal statutes. He was twice awarded the Department of Justice's Special Achievement Award.

Andy has also been active in Bar activities, having served as a board member of the Asian Pacific American Bar Association of the Greater Washington, D.C. Area and as vice-chair of the Committee for Civil Rights and Equal Opportunity for the ABA's Section of Individual Rights and Responsibilities. He has also served on the Board of Directors of the Lawyers' Committee for Civil Rights under Law, the Board of Directors of Asian Americans Advancing Justice – AAJC, and as Chair of the Board of the Asian Pacific American Legal Resource Center. Andy received a B.S.M.E. from Lehigh University in 1988 and an M.S.M.E. degree from the University of Texas at Austin in 1992. In 1995, he received his J.D. from Georgetown University Law Center where he served on the Georgetown Journal of Legal Ethics.

In his spare time, Andy spends time with his wife and two teenage children and attending as many of their sporting events as possible.



## DEPUTY COMMISSIONER FOR HUMAN RESOURCES

**Reginald F. Wells** was named Deputy Commissioner of the Social Security Administration's (SSA) Office of Human Resources effective July 15, 2002 after serving short tenures as Deputy Associate Commissioner for Disability Program Policy and Senior Advisor in the Office of Disability and Income Security Programs. Dr. Wells also serves as the Chief Human Capital Officer and Chief Diversity Office for SSA, as well as the Chair of the Baltimore Federal Executive Board. In his capacity as Deputy Commissioner for Human Resources, Dr. Wells oversees a staff complement of 368 employees with an operating budget of \$130 million.

Dr. Wells served as Deputy Commissioner of the Administration on Developmental Disabilities from October 1994 to April 2002. He shared with the Commissioner full responsibility for planning and directing 25 federal staff and programmatic activities, including the University Centers, Developmental Disabilities Councils, Protection and Advocacy Systems and Projects of National Significance with a program budget of over \$122 million.

From October 1997 to May 1998, Dr. Wells served as the Acting Commissioner of the Administration on Developmental Disabilities in the United States Department of Health and Human Services' Administration for Children and Families (ACF).

Prior to his appointment in the Administration on Developmental Disabilities, Dr. Wells had 10 years of extensive public sector experience with the District of Columbia's (D.C.) Department of Human Services. During his tenure, he served as both Deputy Commissioner and Acting Commissioner for the D.C. Commission on Social Services. The Commission on Social Services had a staff complement of 2,600 employees and an operating budget of \$450 million to offer a broad array of social services, including services for people with developmental disabilities; child welfare services; juvenile justice services; emergency shelter; vocational rehabilitation; Aid to Families with Dependent Children and JOBS.

Previously, Dr. Wells managed Essex County's New Jersey long-term care/geriatrics facility; was instrumental in operating the 1,100 bed psychiatric hospital; monitored and evaluated citizen services; and worked as a research associate for the National Center on Black Aged.

Throughout his career, Dr. Wells has received many awards and recognitions. These include the 2011 Chief Human Capital Officer of the Year, 2010 Warner W. Stockberger Achievement Award, 2006 Presidential Rank Award for Meritorious Executives; the U.S. Secretary's Award for Distinguished Executives; the Distinguished Public Service Award from the Government of the District of Columbia; and Special Recognition Awards from the U.S. Administration on Developmental Disabilities and the D.C. Rehabilitation Services Administration.

His current and past professional and volunteer affiliations include: Goodwill Industries of the Chesapeake, Inc.; Covenant House Washington; District of Columbia ARC; DC Developmental Disabilities Council and DC Medical Care Advisory Committee.

Dr. Wells is licensed as a nursing home administrator in New Jersey and the District of Columbia.

In 1980, Dr. Wells received a Ph.D. in Social and Organizational Psychology from Temple University in Philadelphia. He also earned his M.A. in psychology from Temple University and B.A. in psychology and sociology from American International College.



## ACTING INSPECTOR GENERAL

**Gale Stallworth Stone** currently serves as the Acting Inspector General for the Social Security Administration. Under her direction, the SSA Office of the Inspector General (OIG) inspires public confidence in the integrity and security of SSA's programs by conducting independent and objective audits, evaluations, and investigations. Ms. Stone has served in this role since May 29, 2016.

Mrs. Stone was appointed to the position of Deputy Inspector General on February 24, 2013. In this capacity, she provided leadership and guidance in the planning, policy and program development and management of the OIG.

Mrs. Stone has been a part of the Social Security Administration's OIG since its inception in March 1995. She previously held various positions at the U.S. HHS OIG. Since 1995, Mrs. Stone has held a number of leadership positions within the SSA OIG. Most recently, she served as the Deputy Assistance Inspector General for Audit, with primary responsibility for financial and information technology audits. She is also currently servicing a 4-year appointment to the Information Security and Privacy Advisory Board, which advises the National Institute of Standards and Technology.

Mrs. Stone began her Federal career as a cooperative education student in the Birmingham, Alabama office of the HHS OIG. Over the years, Mrs. Stone has received numerous awards, including a 1996 Hammer Award, a 2002 Inspector General Award, and recognition from the former President's Council on Integrity and Efficiency including a 2004 Glenn Roth Award, a 2006 Award for Excellence, a 2007 Barry Snyder PCIE/ECIE Joint Award, and a 2015 Presidential Rank Award.

Mrs. Stone is a cum laude graduate of Huntingdon College in Montgomery, Alabama. She also holds a Master of Science Degree in Information Systems from The Johns Hopkins University, and she is a Certified Public Accountant.



## DEPUTY COMMISSIONER FOR LEGISLATION AND CONGRESSIONAL AFFAIRS

**Judy Chesser** has served at the Social Security Administration as Deputy Commissioner for Legislation on three occasions during the Administrations of Presidents Clinton and Obama. She also served as the Director of the Washington Office for the City of New York for Mayors Koch, Dinkins and Bloomberg as well as the Director of the Washington Office for the New York City Health and Hospitals Corporation, the largest public hospital system in the nation.

In addition, Judy was Director of Public Policy, Counsel and Acting Executive Director for the United Cerebral Palsy Associations (UCP), the national association with over 100 affiliates in 43 states. Previously she served in the legislative offices of the Department of Housing and Urban Development. She was Assistant to the Chief Counsel and National Political Director of the United Auto Workers and a lobbyist for a Coalition of Labor Unions, Mayors and former high level Defense Department officials regarding budget ceilings.

She is an attorney and served in the General Counsel's Office at the Securities and Exchange Commission and taught law at CUNY law school as an adjunct professor. She graduated cum laude from Boston College Law School where she was on the Law Review. Judy has a BA degree from The Maxwell School, Syracuse University.

She is a Member of the National Academy of Social Insurance, a Trustee for the Committee of 100 on the Federal City, on the Board of Tenleytown Neighbors Association, and the Mid-Atlantic English Springer Spaniel Rescue. She and her husband are owned by two rescues a Springer and a Llewellyn Setter.



## DEPUTY COMMISSIONER FOR OPERATIONS

**Nancy A. Berryhill** became Deputy Commissioner for Operations in July 2013. Prior to that, Nancy was the Regional Commissioner for the Social Security Administration's Chicago Region since March 3, 2011, and the Regional Commissioner for the Social Security Administration's Denver Region since January 2006. While in the Denver Region, Nancy developed numerous innovative agency solutions such as video service delivery, use of webinars, and the first American Indian outreach guide.

Nancy began her career with the Social Security Administration as a student employee. Throughout her distinguished career with Social Security, she has held many positions including Service Representative, Claims Representative, Operations Supervisor, District Manager, Area Director for the State of Illinois and Deputy Regional Commissioner in Denver.

Nancy was selected to the Senior Executive Service Program in October 2002 and completed her program in October 2003 when she was appointed to the Senior Executive Service. As part of her SES assignments, Nancy worked for the Department of Homeland Security and in the Office of the Commissioner of the Social Security Administration.

A native of Chicago, Illinois, Nancy obtained her degree in Computer Science at the Control Data Institute in Chicago. Nancy is a graduate of the Kennedy School of Government at Harvard University.

Nancy has been the recipient of many agency awards including the Commissioner's Citation, the agency's highest and most distinguished award. In 2010, Nancy received the Presidential Rank Award of Meritorious Executive. Her work and achievements consistently demonstrate professional excellence, exceptional leadership, integrity, and commitment to public service.





## DEPUTY COMMISSIONER FOR RETIREMENT AND DISABILITY POLICY

**Virginia Reno** is the Deputy Commissioner for Retirement and Disability Policy. As the Deputy Commissioner, she directs and manages the planning, development, and issuance of operational policy and instructions for the RSDI and SSI programs and initiatives to improve the economic well-being of beneficiaries. In addition, she is the principal advisor to the Commissioner of Social Security on major policy issues and activities in the areas of strategic policy planning, policy research and evaluation, statistical programs, and overall policy development and analysis.

Prior to accepting her current role, Ms. Reno served as Vice President for Income Security at the National Academy of Social Insurance (the Academy), where she was recognized for her expertise on Social Security, retirement policy, private pensions, and disability policy. A founding member of the Academy, Reno led its work on retirement income, workers' compensation, disability insurance and related programs.

Reno directed the Academy's landmark study, *Uncharted Waters: Paying Benefits from Individual Accounts in Federal Retirement Policy*, which was highly regarded by experts on all sides of Social Security policy debates. She also directed the Academy's comprehensive review of Social Security disability programs, culminating in a final report that became the blueprint for many of the changes enacted in the Ticket to Work and Work Incentive Improvement Act of 1999.

Before her work at the Academy, Reno held research and policy positions at the U. S. Social Security Administration (SSA), where she was staff director of the Policy Council that advised the Commissioner of Social Security on legislative, regulatory and administrative issues. Before that, she served in SSA's office of research and statistics, where she directed the program analysis staff. She has worked for four major commissions on Social Security, including serving as a senior advisor to the 1983 Greenspan Commission.

Reno has published numerous research articles on Social Security, disability policy, private pensions, retirement policy, the income of the elderly, public opinion about Social Security, labor force participation of women, and the treatment of women and families in benefit and tax systems. She has testified frequently in Congressional committees, and twice received the SSA's Commissioner's Citation, including once from Robert M. Ball. Reno received her B.A. from the Honors College of the University of Oregon and served in the U.S. Peace Corps in Liberia.



## DEPUTY COMMISSIONER FOR SYSTEMS AND CHIEF INFORMATION OFFICER

**Rob Klopp** started at the Agency as the CTO in January of 2015 and assumed the role of CIO and DC of Systems the following August. Rob was recruited by the United States Digital Services team specifically to support the Agency.

He comes to Baltimore from the Silicon Valley where he has worked for both large software enterprises and for smaller start-ups. You may know of some of the start-ups. Greenplum, for example, was acquired by EMC and Teradata is now a leading company in the relational database and data warehouse markets. Rob spent nearly two years based in Switzerland as the EMC/Greenplum CTO for Europe, the Middle East, and Africa. Other start-ups were too small to make the news. He also worked in the consulting services space for EDS, now part of HP, and for what is now KPMG, as well as in his own boutique consultancy. He founded a little software start-up that was sold to a large database company. Finally, Rob started his career out of college in the Government arena with the State of California where he was a mainframe systems programmer.

Within these firms, Rob has filled both technical and executive roles; sometimes facing the engineering and product side of the business and sometimes facing the end-users, but always with both feet grounded in the technology.





## CHIEF STRATEGIC OFFICER

**Ruby Burrell** is currently the Chief Strategic Officer of the Social Security Administration's established Office of the Chief Strategic Officer. The Chief Strategic Officer works across the agency to infuse strategic thinking and promote innovation to improve agency performance and service delivery.

Most recently, Ms. Burrell was the Associate Commissioner for Field Site Operations in the Office of Quality Performance where she was responsible for directing and managing quality assurance and evaluation of SSA programs in the field.

As the former Associate Commissioner for the Office of Disability Determinations (ODD) in Operations, Ms. Burrell led an organization that was responsible for the operational aspects of the disability determination function in the Disability Determination Services (DDS). In that role, she was responsible for managing the \$2.3 billion national DDS budget and was an advocate for the 10 regional offices and the DDSs in 54 States and territories.

Ms. Burrell is a strategic thinker who has envisioned and led some of the most transformational initiatives at SSA. She was the Lead Agency Executive for Independence Day Assessment (IDA) activities throughout the agency, facilitating the transition to a fully electronic disability claims process. She also co- led the development of the vision for our Disability Claims Processing System (DCPS) which will eliminate the need for 5 different legacy systems and create one common processing system for disability claims.

Prior to her position with ODD, Ms. Burrell served as the Deputy Associate Commissioner for the Office of Public Service and Operations Support responsible for providing operational analysis and support related to programs, budget, human capital, and security to the Deputy Commissioner for Operations and the 48,000 Operations employees.

She graduated with honors from Virginia State University with a BS degree in Psychology. She also completed some graduate work at the University of Virginia.

Ms. Burrell has over 30 years of experience in service delivery at SSA. She started as a front-line claims representative, responsible for processing retirement, disability, and survivor claims. She then progressed to mid-level and senior level management positions and was SSA Area Director in Washington, D.C. during the terrorist attacks on September 11, 2001, and led the effort to provide SSA support to the families of the victims of the attack on the Pentagon. She received high praise from the Department of Defense and SSA for her leadership and humanitarian efforts. She was selected for the SSA Senior Executive Service.

Candidate Development Program in October 2002 and she became a member of the Senior Executive Service in October 2003.



## REGIONAL COMMISSIONER, ATLANTA REGION

Prior to becoming the Regional Commissioner in SSA's Atlanta Region, **Rose Mary Buehler** proudly served as the Assistant Regional Commissioner for Processing Center Operations in Birmingham, Alabama. Rose Mary is a graduate of Class V of the Senior Executive Service Candidate Development Program (SES CDP). During the program, her assignments included Deputy Regional Commissioner in the Denver Region, Deputy Associate Commissioner for the Office of Electronic Services, Operations, and Deputy Associate Commissioner for the Office of Earnings, Enumeration, and Administrative Systems, Systems. Rose Mary also had an external assignment as the Community Development Director for Positive Maturity, Inc., a United Way partner agency.

Rose Mary began her career with the Social Security Administration in July 1990 as a Claims Representative in the Jackson, MS District Office. She moved through the ranks to increasingly responsible positions throughout the Atlanta Region, including the Alabama Area Director. Rose Mary also functioned as the Chair of the Atlanta Region's Hurricane Katrina Public Service Restoration Team.

She participated on numerous national and regional workgroups covering such topics as PolicyNet, IVT training, Integrity Reviews, and Succession Management Planning. Rose Mary also performed as a national and regional IVT instructor for topics such as PCACS and Workload Management. She is the recipient of three Commissioner Citations, two individual awards, and one as a member of the Hurricane Katrina Recovery Team, as well as an Atlanta Regional Commissioner's Citation Team Award.

Rose Mary is a graduate of Mississippi College, where she received a Bachelor of Science in Business Administration with a concentration in Communications. She is married and has two stepdaughters and three grandchildren.



## REGIONAL COMMISSIONER, BOSTON REGION

**Linda M. Dorn** has served as the Regional Commissioner for the Boston Region since September 2014. She is responsible for the service operations in the six New England States: Connecticut, Maine, Massachusetts, New Hampshire, Rhode Island and Vermont.

She joined the Social Security Administration (SSA) in August 2002 in the Chicago Region as a Project Manager and also served as Deputy Director in the Center for Disability. During her career, Linda has held many executive leadership positions in SSA Headquarters, with assignments in the Office of the Commissioner, Office of Quality Review, Office of Systems and the Office of the Deputy Commissioner for Operations. In December 2010, she received her first appointment in the Senior Executive Service as the Associate Commissioner for Disability Determinations. She joined the Boston Region in March 2013 as the Deputy Regional Commissioner.

Prior to joining SSA, Linda served the State of Michigan as Director of the Michigan Disability Determination Services (DDS) within the Michigan Family Independence Agency. She began her state government professional career as a Disability Examiner.

Linda received both her bachelor's and master's degrees from Michigan State University.



## REGIONAL COMMISSIONER, CHICAGO REGION

**Phyllis M. Smith** has served as the Acting Regional Commissioner for the Chicago Region since January 2015. As the principal Social Security official for Illinois, Indiana, Michigan, Minnesota, Ohio and Wisconsin, she provides leadership for the effective operation of all Social Security programs within the region. She directs about 9,000 federal and state employees in SSA's mission of service delivery and manages an annual budget of over \$300 million. She is responsible for 221 field offices, 8 Area Director's offices, 6 teleservice centers, the Great Lakes Processing Center, and the Regional Office.

Phyllis's accomplishments include having been named the Deputy Regional Commissioner for the Chicago Region, Assistant Regional Commissioner for Management and Operations Support, and having served as the Assistant Regional Commissioner for Processing Center Operation at the Great Lakes Program Service Center.

Phyllis began her SSA career as a Title XVI Claims Representative and served in increasingly responsible positions, primarily in the Chicago Region, before her appointment to Senior Executive Service. These positions included Operations Supervisor, Program Specialist in the Center for RSI/SSI, Area Administrative Assistant, Hearings Office Director in the Office of Disability and Adjudication Review, and Executive Officer.

As a native of Indiana, Phyllis takes great pride in being able to lead the Chicago Region. Her work and achievements consistently demonstrate professional excellence, exceptional leadership, integrity, and commitment to public service.



## REGIONAL COMMISSIONER, FOR DALLAS REGION

**Sheila Everett** serves as the Regional Commissioner of the Dallas Region. Sheila holds a Bachelor's degree in Educational Psychology and a Master's Degree in Vocational Rehabilitation Counseling from Mississippi State University. She began her career at the Mississippi Disability Determination Services (DDS), serving the last eight years as Director. Under her leadership, Mississippi was the first state to implement Social Security's electronic disability folder. She also served as National Council of Disability Determination Directors (NCDDD) President for two years.

In April 2005, she joined the Social Security Administration and worked in the Atlanta Region on regional and national disability projects. In SSA headquarters, she was the Senior Advisor for the Office of Disability Determinations (ODD), the Deputy Associate Commissioner for the Office of Disability Programs (ODP), and the Associate Commissioner for the Office of Medical and Vocational Expertise (OMVE).

In addition to her Mississippi background, Sheila also has strong family ties to Texas and is excited about the opportunity to provide leadership to the Dallas region.



## REGIONAL COMMISSIONER, DENVER AND SEATTLE REGIONS

**Stanley C. Friendship** is the Regional Commissioner for the Social Security Administration, Denver and Seattle Regions. With direct oversight of the region's field offices and Teleservice Centers, Stanley ensures that every member of the public receives prompt, high quality, and technically accurate service.

Stanley began his career with Social Security as an Access Student in Everett, Washington, more than thirty years ago with the hope of making a difference in the people's lives he served. During his tenure with the agency, he has held several progressively more challenging positions in the field office environment: Claims Development Clerk, Service Representative, Claims Representative, Branch Manager, Assistant District Manager, District Manager, and Area Director. He also spent several years in the Teleservice Center as a Unit Supervisor, Section Chief, and TSC Manager. He has worked as an analyst in both the central and the regional office. Stanley recently completed the Senior Executive Service Candidate Program, where he held positions as Acting Deputy Regional Commissioner for the Denver Region; Executive Assistant at GSA; Division Director for the Division of Operations Analysis and Customer Service, and Acting Associate Commissioner of the Office of Central Operations.

Throughout his career, Stanley has promoted diversity and has actively shared his passion for public service with his clients and colleagues. He strongly advocates developing employees for higher level opportunities knowing that succession management will be so important in the future. He maintains that it is critical for Social Security to have employees who not only produce high quality work but also contribute their unique ideas to improve and streamline the work of the agency.

Stanley was born and raised in New Orleans, Louisiana. He earned an Associate's degree from Bellevue Community College as well as a Bachelor of Arts degree in Social Work from the University of Washington. He is married with one daughter, and he is also the proud grandfather of three granddaughters. In his free time, Stanley enjoys his other job as a professional drummer.



## REGIONAL COMMISSIONER, KANSAS CITY REGION

**Mike Kramer** serves as the Regional Commissioner in the Kansas City Region and has direct supervision and oversight of the Region's field operations in Iowa, Kansas, Nebraska and Missouri.

Mike began his career with Social Security in 1991 as a Claims Representative in the Topeka, Kansas field office after receiving a Bachelor's degree in Political Science from Washburn University. In 1995 he earned a Master's degree in Public Administration from the University of Kansas. Mike moved to the regional office (RO) in 1999 and held a variety of analyst, team leader and project manager positions. He also served as the manager of the Independence, Missouri cluster before returning to the RO as the Deputy ARC MOS.

Mike is a graduate of Kansas City's Employee Development Program and Class V of the Senior Executive Service Candidate Development Program. He served in Headquarters as the Deputy Associate Commissioner for both Facilities Management and Security and Emergency Preparedness before returning to Kansas City as ARC MOS in 2012. In 2015, Mike completed a 6-month assignment as Acting Assistant Deputy Commissioner for Operations.





## REGIONAL COMMISSIONER, NEW YORK REGION

**Frederick M. Maurin** is the fourth Regional Commissioner of the Social Security Administration's New York Region. Appointed to the Senior Executive Service in March 2011 as Deputy Regional Commissioner of the New York Region, he became the Region's primary official in July 2014.

As Regional Commissioner, Mr. Maurin has direct authority over the Social Security Administration's operations in New York, New Jersey, Puerto Rico and the U.S. Virgin Islands. This encompasses an annual administrative budget of approximately \$400 million for more than 3900 employees in 103 field offices, four teleservice centers, four Social Security Card Centers, the Northeastern Program Service Center and the Regional Office administrative staff. Throughout the region, more than seven million beneficiaries receive more than \$88 billion in Social Security and Supplemental Security Income benefits annually.

Mr. Maurin began his career with the Social Security Administration in 1972 as a Claims Representative. He subsequently advanced through progressively responsible supervisory and management positions in the New York Region, including Operations Supervisor, Assistant District Manager, District Manager, and Area Director. As Area Director for New Jersey, he supervised the operations of 28 Field Offices and more than 700 employees. Prior to that, he served as Area Director in New York City and the Lower Hudson Valley where he directed 18 Field Offices. Mr. Maurin served as Acting Regional Commissioner for the Philadelphia Region from October 2011 to May 2012, with direct authority over the Social Security Administration's operations in Delaware, Maryland, Pennsylvania, Virginia, West Virginia and the District of Columbia, as well as the Mid-Atlantic Program Service Center.

During 2010, he served as a congressional aide in the Washington, DC office of Congressman Charles B. Rangel of New York.





## REGIONAL COMMISSIONER, PHILADELPHIA REGION

**Terry Stradtman** became the Regional Commissioner for the Social Security Administration's Philadelphia Region on May 6, 2012. He was appointed to the Federal Senior Executive Service in 2007.

Terry is a native of Sandusky, Ohio. He began his career with SSA in 1979 as a claims representative in the Sandusky field office. In 1983, he transferred to an Operations Analyst position in the Frederick, Maryland field office. Since becoming an Operations Supervisor in 1986, Terry has held a number of progressively responsible managerial and executive level positions in the Philadelphia Region and Headquarters.

In 1990, Terry was selected as the District Manager of the Baltimore Mondawmin Field Complex and was the manager of the SSA's first IWS/LAN field office. He subsequently was the Director for the Baltimore Teleservice MegaCenter for four years, which at the time was SSA's largest teleservice center with over 590 telephone agents. In 1999, he was selected as the Area Director for SSA field offices in Maryland, Delaware, and parts of Virginia and West Virginia. In August 2007, he joined the Office of Systems as the Deputy Associate Commissioner for the Office of Retirement and Survivors Insurance Systems (ORSIS) where he led agency efforts to implement the Economic Recovery Payment legislation. He was selected as the Associate Commissioner for the Office of Earnings, Enumeration and Administrative Systems (OEEAS) in May 2010. In January 2011, Terry was selected as the Associate Commissioner for Office of Central Operations (OCO) in Operations.

Terry is a graduate of SSA's Mid-Level Management Program in 1995 and the agency's SES Candidate Development Program in March 2004.

Terry holds a Bachelor of Arts degree in Political Science from The Ohio State University. Over the years, he has received numerous Regional Commissioner, Associate Commissioner, Deputy Commissioner, and Commissioner Citations for his leadership abilities. Terry currently lives in Pennsylvania with his wife and daughter. In his spare time, he enjoys following Ohio State football and basketball, along with watching his daughter play soccer at the collegiate level.



## REGIONAL COMMISSIONER, SAN FRANCISCO REGION

**Grace Kim** is the Regional Commissioner in San Francisco. Grace began her Federal service in 1989, when she joined the Chicago Office of the General Counsel (OGC) for the Department of Health and Human Services. When the Social Security Administration became an independent agency in 1995, Grace continued her career with the SSA's Chicago OGC. As an attorney for HHS and SSA, Grace has represented the agency in a wide array of cases in Federal District Court and the Courts of Appeals, including a class action involving hundreds of class members.

Grace also has handled cases before various adjudicators and tribunals including bankruptcy cases in Federal court, legal opinions, Privacy Act and disclosure matters, state and local coverage matters, and a wide range of requests for legal advice. In 2001, Grace became a Supervisory Attorney and oversaw a portion of the Office's program litigation workload and employment cases.

In 2006, Grace became the Deputy Regional Chief Counsel, and beginning in 2011, the Acting Regional Chief Counsel in Chicago. In December 2012, Grace was appointed to the Senior Executive Service as Regional Chief Counsel for the San Francisco Office. Grace received her B.A. from the University of Michigan in 1986 and her J.D. from Loyola University Chicago School of Law in 1989.



## SENIOR ADVISOR BEATRICE M. DISMAN

**Beatrice M. Disman** is nationally recognized for her Executive leadership, communication and political skill. She has over four decades of Executive experience leading complex large organizations and planning and implementing major legislation affecting the American public.

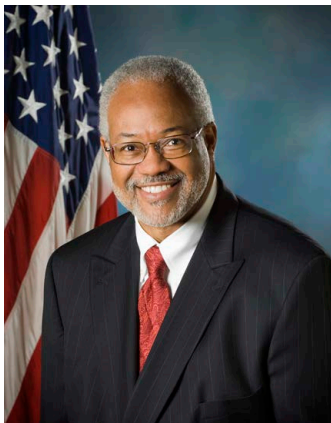
Ms. Disman retired from the Social Security Administration (SSA) in July 2014 as the Regional Commissioner of the agency's New York region. She was the third Regional Commissioner to hold this position in the New York region and the first as an independent agency. As Regional Commissioner, Ms. Disman had direct authority over SSA's operations in New York, New Jersey, Puerto Rico and the U.S. Virgin Islands. This encompassed an annual administrative budget of approximately \$400 million for more than 3900 employees in 123 locations serving more than seven million beneficiaries who received more than \$88 billion in Social Security and Supplemental Security Income benefits annually. At the request of the Commissioner of Social Security, Ms. Disman was asked to plan and implement the responsibilities given to Social Security in the Medicare Prescription Drug Act of 2003, the Medicare Improvements for Patients and Providers Act of 2008 and the Affordable Care Act of 2010. In this capacity, she had extensive interactions with other Executive Branch agencies and with Congress.

Ms. Disman returned to SSA in October 2014 as a Senior Advisor to the Acting Commissioner, to provide executive leadership, advice and mentoring by working with the Deputy Commissioners and other Agency staff in such diverse areas as the disability program, anti-fraud initiatives, management challenges, and special projects.

Ms. Disman earned a BA in History and Political Science from Brooklyn College, an MA in American Diplomatic History from Ohio State University Graduate School and an MBA from New York University's Graduate School of Business. She has also completed the LEGIS Fellows Program, serving as Legislative Assistant to a U.S. Senator, and completed a Program for Senior Managers in Government at Harvard University's John F. Kennedy School of Government. Ms. Disman is also an alumna of the Federal Executive Institute in Charlottesville, VA.

Throughout her distinguished career, Ms. Disman has received numerous awards and commendations, including the New York State Medal of Honor, presented on behalf of the Governor for her tireless efforts to assist the families of victims from the attacks of September 11th. Ms. Disman has received three Presidential Rank Awards, numerous citations from Commissioners of Social Security and the Commissioner's Leadership Award. In 2005, she was one of two executives to receive a newly created Commissioner's Trailblazer Award for leadership, tenacity, and creativity.

Chairman Emeritus of the New York Federal Executive Board, Ms. Disman served as its Chair from 1997 to 2003, leading the collaborative effort among 150 federal agencies throughout the City of New York especially the period after September 11th. She is a member of the National Academy of Social Insurance. A tireless advocate for many social issues, Ms. Disman continues to serve her fellow New Yorkers in leadership roles in her local Community Board.



## SENIOR ADVISOR GREG PACE

**Greg Pace** is a Senior Advisor to the Acting Commissioner of Social Security. In that role, he provides the Acting Commissioner with a broad array of executive level consultative and representational services.

Greg was appointed to the Senior Executive Service in 1994. Prior to his current assignment, Greg served in several senior executive positions: Senior Advisor to the Deputy Commissioner of Social Security (2011-2012); Deputy Chief Information Officer (CIO) for SSA (2005-2011); Acting CIO for SSA (2009); member, Federal CIO Council (2005-2011); Deputy Associate Commissioner, Office of Enterprise Support, Architecture and Engineering, SSA (2002-2005); and, Deputy Director, Office of Systems, Planning and Integration, SSA (1994-2002). Greg is a graduate of the Department of Health and Human Services' SES Candidate Development Program.

Prior to becoming a senior executive, Greg also served the agency in several senior level management and technical positions in the areas of information technology, technology innovation, program policy, and operations. Greg joined SSA as a computer specialist in 1974. He was recruited from private industry to help the agency engineer and deploy a national network of computers and terminals to support the implementation of the agency's Supplemental Security Income Program.

In addition to his normal duties, Greg has lectured and provided consultant services to the World Bank, the International Social Security Association, and the Inter-American Center for Social Security Studies. Some of the countries that he provided services to include: Romania, Uganda, Ghana, Nigeria, Antigua, St. Christopher, and Bermuda.

Greg has received several awards and commendations including a Presidential Rank Award and two Commissioner Citations.



### SENIOR ADVISOR JANE L. ROSS

**Jane L. Ross**, Ph.D. is a senior policy advisor to the Acting Commissioner of Social Security since 2014. From 2001 to 2012 she was a member of the National Academy of Sciences, National Research Council, Division of Behavioral and Social Science and Education.

From 1998 to 2001, Jane was the Deputy Commissioner for Policy at SSA. In this role, she led SSA efforts to conceptualize and analyze policies addressing major national issues. Major efforts included proposals for the long-range financing of the Social Security programs; policies to improve the management and integrity of the Supplemental Security Income program; and options to reduce poverty among aged women.

From 1992 to 1998, Jane was the Issue Area Director and Assistant Director for Income Security Issues and the United States General Accounting Office. In this role, she led an organization of roughly 100 staff that researched and produced reports and testimony at the request of Congressional committees and individual members of Congress. Areas of particular concentration included state implementation of the Welfare Reform Law of 1996; management analyses of the Social Security Administration; areas of vulnerability in the Supplemental Security Income Program and long-range solvency of the Social Security system.

Jane has a B.A. in International Relations, and M.A. in Economics, and a Ph.D. in Economics from American University.

## APPENDIX C: MANAGEMENT RESPONSIBILITIES AND CONTACT INFORMATION FOR KEY EXECUTIVES

### HEADQUARTERS EXECUTIVES

TITLE	NAME	CONTACT INFORMATION	MANAGEMENT RESPONSIBILITIES
Commissioner of Social Security (COSS)	<b><u>Carolyn W. Colvin*</u></b>	Carolyn.Colvin@ssa.gov  Baltimore: 410-965-9000  Washington DC: 202-358-6077	Manages all agency programs and staff.
Deputy Commissioner of Social Security (DCOSS)	<b><u>Carolyn W. Colvin</u></b>	Carolyn.Colvin@ssa.gov  Baltimore: 410-965-9000  Washington DC: 202-358-6077	Serves as the alter ego for the Commissioner, is the accountable official for improper payments, and serves as the Chief Operating Officer responsible for improving agency management and performance.
Chief of Staff	<b><u>Stacy Rodgers</u></b>	Stacy.Rodgers@ssa.gov  410-965-4681	
Executive Secretary	<b><u>Darlynda Bogle</u></b>	Darlynda.Bogle@ssa.gov  410-965-3609	
Executive Counselor to the Commissioner	<b><u>Frank Cristaudo</u></b>	Frank.Cristaudo@ssa.gov  410-965-4991	
Chief Actuary (CACT)	<b><u>Stephen C. Goss</u></b>	Stephen.Goss@ssa.gov  410-965-3000	Plans and directs program actuarial estimates and analyses for the retirement, survivors, disability, and Supplemental Security Income programs and for any proposed changes in those programs and trust funds. CACT provides technical and consultative services to the Commissioner, to the Board of Trustees of the Social Security Trust Funds, and to its staff.
Deputy Commissioner for Budget, Finance, Quality, and Management (DCBFQM)	<b><u>Michelle King</u></b>	Michelle.King@ssa.gov  410-965-7748	Directs our comprehensive management programs including budget, acquisition and grants, facilities and supply management, and security and emergency preparedness.
Deputy Commissioner for Communications (DCCOMM)	<b><u>Douglas K. Walker</u></b>	Douglas.Walker@ssa.gov  410-966-2030	Conducts our national public information and outreach programs, leads our efforts to improve the clarity, tone, and readability of our notices, and fosters the transparency of our operations.
Deputy Commissioner for Disability Adjudication and Review (DCDAR)	<b><u>Theresa Gruber</u></b>	Theresa.Gruber@ssa.gov  410-965-6006	Administers our nationwide appeal and review program in accordance with relevant Federal laws.

TITLE	NAME	CONTACT INFORMATION	MANAGEMENT RESPONSIBILITIES
General Counsel (GC)	<b><u>Andy Liu</u></b>	Andy.Liu@ssa.gov 410-965-0600	Advises the Commissioner, Deputy Commissioner, and all subordinate organizational components (except the Inspector General) on legal matters.
Deputy Commissioner for Human Resources (DCHR)	<b><u>Dr. Reginald F. Wells</u></b>	Reginald.Wells@ssa.gov 410-965-1900	Administers our human resources programs, including training, human capital initiatives, personnel and employee relations, labor management, and civil rights and equal opportunity.
Inspector General (IG)	<b><u>Gale Stone*</u></b>	Gale.Stone@ssa.gov 410-966-8385	Promotes economy, efficiency, and effectiveness in the administration of our programs and operations, and prevents and detects fraud, waste, abuse, and mismanagement.
Deputy Commissioner for Legislation and Congressional Affairs (DCLCA)	<b><u>Judy Chessser</u></b>	Judy.Chesser@ssa.gov 202-358-6030	Develops and conducts our legislative program, serves as our liaison to Congress, and analyzes legislative and regulatory initiatives.
Deputy Commissioner for Operations (DCO)	<b><u>Nancy A. Berryhill</u></b>	Nancy.Berryhill@ssa.gov 410-965-3145	Directs our national network of field offices, National 800 Number Tele-Service Centers, and processing centers. Oversees the State Disability Determination Services.
Deputy Commissioner for Retirement and Disability Policy (DCRDP)	<b><u>Virginia P. Reno</u></b>	Virginia.Reno@ssa.gov 202-358-6029	Advises the Commissioner on major policy issues and is responsible for all major activities in the areas of program policy planning, policy research and evaluation, statistical programs and overall policy development, analysis and implementation.
Deputy Commissioner for Systems (DCS) and Chief Information Officer (CIO)	<b><u>Rob Klopp</u></b>	Robert.Klopp@ssa.gov 410-965-8399	Serves as the Chief Information Officer. Directs the strategic management of our systems and databases and the development, validation, and implementation of any new systems. Directs the conduct of systems and operational integration and strategic planning processes, and the implementation of a comprehensive systems configuration management, data base management, and data administration program.

\*Acting

## REGIONAL EXECUTIVES



REGION	NAME	STATES & AREAS INCLUDED	REGIONAL COMMISSIONER	CONTACT INFORMATION
I	Boston	Connecticut, Maine, Massachusetts, New Hampshire, Rhode Island, Vermont	Linda M. Dorn	617-565-2870
II	New York	New York, New Jersey, territories of Puerto Rico, U.S. Virgin Islands	Frederick M. Maurin	212-264-3915
III	Philadelphia	Delaware, Maryland, Pennsylvania, Virginia, West Virginia, District of Columbia	Terry M. Stradtman	215-597-5157
IV	Atlanta	Alabama, Florida, Georgia, Kentucky, Mississippi, North Carolina, South Carolina, Tennessee	Rose Mary Buehler	404-562-2629
V	Chicago	Ohio, Michigan, Illinois, Indiana, Wisconsin, Minnesota	Phyllis M. Smith	312-575-4000
VI	Dallas	Arkansas, Louisiana, Oklahoma, New Mexico, Texas	Sheila Everett	214-767-4207
VII	Kansas City	Iowa, Kansas, Missouri, Nebraska	Mike Kramer	816-936-5700
VIII	Denver	Colorado, Montana, North Dakota, South Dakota, Utah, Wyoming	Stanley C. Friendship	206-615-2107
IX	San Francisco	Arizona, California, Nevada, Hawaii, territories of Guam, American Samoa, Saipan	Grace Kim	510-970-8400
X	Seattle	Alaska, Idaho, Oregon, Washington	Stanley C. Friendship	206-615-2107



## APPENDIX D: OUR POLITICAL APPOINTEES

POSITION TITLE	INCUMBENT	TYPE OF APPOINTMENT	CAREER BACKUP
<b>Commissioner, Office of the Commissioner</b>	*Acting Carolyn W. Colvin	Presidential Appointment with Senate Confirmation (PAS)	Nancy Berryhill
<b>Deputy Commissioner of SSA, Office of the Commissioner</b>	Vacant	Presidential Appointment with Senate Confirmation (PAS)	Vacant
<b>Chief of Staff, Office of the Commissioner</b>	Stacy Rodgers	Non-Career Appointment (NA)	Joe Jopez
<b>Deputy Commissioner, Office of Legislation and Congressional Affairs (OLCA)</b>	Judy Chesser	Non-Career Appointment (NA)	Royce Min
<b>Deputy Commissioner, Office of Disability and Retirement Policy (ORDP)</b>	Virginia Reno	Non-Career Appointment (NA)	Marianna LaCanfora
<b>Deputy Commissioner, Office of Communications (OCOMM)</b>	Douglas K. Walker	Non-Career Appointment (NA)	Jim Borland
<b>Associate Commissioner, Office of External Affairs, Office of Communications</b>	J. Jioni Palmer	Non-Career Appointment (NA)	Patrice Stewart
<b>Press Officer, Office of Communications (OCOMM)</b>	Vacant	Non-Career Appointment (NA)	Mark Hinkle
<b>Deputy Commissioner for Systems/ Chief Information Officer (CIO), Office of Systems</b>	Rob Klopp	Non-Career Appointment (NA)	Sylvianne Haldiman
<b>Assistant Deputy Commissioner for Systems/Deputy CIO/Senior Official for Cybersecurity, Office of Systems</b>	Herb Strauss	Non-Career Appointment (NA)	Tom Grzymski
<b>Associate Commissioner, Office of Retirement Policy, Office of Retirement and Disability Policy (ORDP)</b>	Thomas Hungerford	Non-Career Appointment (NA)	Natalie Lu
<b>General Counsel, Office of the General Counsel (OGC)</b>	Andy Liu	Non-Career Appointment (NA)	Dan Callahan
<b>Senior Advisor to the Commissioner</b>	Ben Belton	Schedule C	Jasmine Leigh
<b>Deputy Commissioner, Office of Legislation and Congressional Affairs (OLCA)</b>	Femeia Adamson	Schedule C	Bob Nickerson

**Types of Appointments**

PAS: Positions Subject to Presidential Appointment with Senate Confirmation

NA: Senior Executive Service General Positions Filled by Non-career Appointment

Schedule C: These appointees keep a confidential or policy-determining relationship to their supervisor and agency head. Generally, the authority to fill a Schedule C job is revoked when the incumbent leaves and agencies need specific approval for OPM to establish or reestablish the position.

## APPENDIX E: WEBSITE LINKS

SITE URL	DESCRIPTION
<a href="http://www.socialsecurity.gov/">http://www.socialsecurity.gov/</a> (English) <a href="http://www.segurosocial.gov/">http://www.segurosocial.gov/</a> (Spanish)	SSA Home Page - Main Site
<a href="https://www.ssa.gov/socialmedia/">https://www.ssa.gov/socialmedia/</a>	Social Media Hub (Facebook, Twitter, Google+, YouTube)
<a href="http://blog.ssa.gov/">http://blog.ssa.gov/</a>	Social Security Matters Blog
<a href="https://www.ssa.gov/vision2025/">https://www.ssa.gov/vision2025/</a>	Vision 2025
<a href="https://www.ssa.gov/online services/">https://www.ssa.gov/online services/</a>	Online Services
<a href="http://www.socialsecurity.gov/open/">http://www.socialsecurity.gov/open/</a>	Open Government Initiative
<a href="http://www.socialsecurity.gov/digitalstrategy/">http://www.socialsecurity.gov/digitalstrategy/</a>	Digital Government Strategy
<b>SSA ONLINE DOCUMENTS</b>	
<a href="https://www.ssa.gov/agency/asp">https://www.ssa.gov/agency/asp</a>	Agency Strategic Plan (ASP)
<a href="http://www.socialsecurity.gov/irm/index.htm">http://www.socialsecurity.gov/irm/index.htm</a>	Information Resources Management (IRM) Strategic Plan
<a href="http://www.socialsecurity.gov/performance/">http://www.socialsecurity.gov/performance/</a>	Annual Performance Plan and Annual Performance Report
<a href="http://www.socialsecurity.gov/budget/">http://www.socialsecurity.gov/budget/</a>	Budget Estimates and Related Information
<a href="http://www.socialsecurity.gov/finance/">http://www.socialsecurity.gov/finance/</a>	The Agency Financial Report
<a href="http://ssa.gov/budget/2013FullJustification.pdf">http://ssa.gov/budget/2013FullJustification.pdf</a>	SSA Justification of Estimates for Appropriations Committees FY2013
<a href="http://www.socialsecurity.gov/pgm/links_governance.htm">http://www.socialsecurity.gov/pgm/links_governance.htm</a>	Various Budget and Performance Documents
<b>MAJOR INVESTMENTS REPORTING</b>	
<a href="http://www.itdashboard.gov/portfolios/agency=016">http://www.itdashboard.gov/portfolios/agency=016</a>	Exhibit 300s - Federal IT Dashboard
<b>MISCELLANEOUS</b>	
<a href="http://socialsecurity.gov/hit/index.html">http://socialsecurity.gov/hit/index.html</a>	Health Information Technology (Health IT)
<a href="http://ssa-custhelp.ssa.gov/">http://ssa-custhelp.ssa.gov/</a>	Agency Frequently Asked Questions
<a href="http://www.ssa.gov/locator">www.ssa.gov/locator</a>	SSA Office Locator
<a href="http://www.socialsecurity.gov/history/">http://www.socialsecurity.gov/history/</a>	Collection of SSA History-Related Materials
<b>BIPARTISAN ADVISORY BOARD</b>	
<a href="http://www.ssab.gov/">http://www.ssab.gov/</a>	Social Security Advisory Board

## APPENDIX F: COMPLETE LISTING OF BIPARTISAN BUDGET ACT OF 2015 IMPLEMENTATION PROVISIONS

On November 2, 2015, the President signed into law H.R. 1314, the Bipartisan Budget Act (BBA) of 2015, which became Public Law 114-74. In addition to reallocating funds from the Old-Age and Survivors Insurance (OASI) trust fund to the Disability Insurance (DI) trust fund, the legislation makes several reforms to the Social Security Program. All 24 provisions are provided in the following table:

TITLE		SUMMARY REQUIREMENTS	EFFECTIVE DATE	IMPLEM ENTED	SSA REG	SYS CHANGE	ACTIONS
301	Debt Collection Improvements (long-term)	Amends the Communications Act of 1934 to authorize the use of automated telephone equipment to call cellular telephones for collecting debts owed to the U.S. Government. In addition, authorizes the Federal Communications Commission (FCC), in consultation with the Department of the Treasury (TD) to issue regulations to limit the number and duration of any such calls.	8/1/16	√			Implemented 8/1/16. No action needed. This regulation is for the Federal Communications Commission and the Department of the Treasury.
601	Maintaining 2016 Medicare Part B Premium and Deductible Levels Consistent with Actuarially Fair Rates (short-term)	Establishes the 2016 monthly Medicare Part B premium for enrollees not subject to the “hold harmless” provision. Requires these enrollees to pay an additional \$3 to cover the cost of setting the premium rate; requires enrollees subject to an Income-Related Monthly Adjustment Amount (IRMAA) to pay an additional charge that is higher than \$3; extends those provisions through 2017 if no Social Security COLA increase that year.	11/2/15	√		√	Implemented 11/18/15, working with CMS. Systems resources are needed each year when the Medicare Part B rates are announced.
701	Civil Monetary Penalty (CMP) Inflation Adjustments (mid-term)	Requires the head of each Federal agency to adjust CMPs within its jurisdiction for inflation each year, based on the cost-of-living increase in the Consumer Price Index (CPI). NLT 07/01/2016, establish first inflation adjustment based on the percentage by which the CPI for 2015 exceeds the CPI of the year the CMP was first established, or last adjusted. Include information about CMPs and adjustments the Agency Financial Report.	8/1/16	√	√		Implemented 8/1/16. Published the Interim Final Rule on 6/27/16. Annual adjustment due by January 15 beginning in 2017. Must publish 2017 rates by December 15.

TITLE		SUMMARY REQUIREMENTS	EFFECTIVE DATE	IMPLEM ENTED	SSA REG	SYS CHANGE	ACTIONS
811	Expansion of Cooperative Disability Investigations Units (CDIUs) (long-term)	Requires the COSS to establish CDIUs to cover all 50 States, D.C., Puerto Rico, Guam, the Northern Mariana Islands, the Virgin Islands, and American Samoa; subject to funding and participation of local law enforcement agencies. Required to submit annual progress report to House Committee on Ways and Means, and Senate Finance Committee until nationwide coverage achieved.	10/1/22				Coverage provided to Washington DC effective October, 2015. Collaborating with OIG to provide coverage to one additional state/territory in FY 2016. Expansion requirement of no later than 10/1/22 is subject to the availability of funding.
812	Exclusion of Certain Medical Sources of Evidence	This provision requires SSA to exclude evidence provided by people convicted of certain felonies, excluded from participation in Federal health care programs, or assessed with a civil monetary penalty for submission of false evidence; includes good cause exception as determined by the COSS.	11/2/16		√	√	The final rule was published on 9/23/16 and will be effective on November 2, 2016. Added new flag and document type in the electronic disability folder.
813	New and Stronger Penalties	Increases the penalty for conspiracy to commit Social Security fraud and certain offenses committed by people violating positions of trust.	11/2/15	√	√		Effective upon enactment. Plan to publish regulations in 2017 (post-implementation). New rates take effect January 15, 2017.
814	References to Social Security and Medicare in Electronic Communications	Includes electronic and internet communications in the prohibitions from misusing Social Security or Medicare symbols, emblems, or names; treats each dissemination, viewing, or accessing of a communication as a separate violation.  Current regulations at 20 CFR part 498 need to be amended to reflect this legislative modification	11/2/15	√	√		Effective upon enactment. Plan to publish regulations in 2017 (post-implementation).
815	Change to Cap Adjustment Authority	Adds costs of CDIUs, fraud prosecutions by U.S. Attorneys, and work-related continuing disability reviews to the activities covered by the discretionary spending cap adjustments for SSA program integrity; adjusts discretionary.	11/2/15	√			Effective upon enactment. This provision increased the authorized funding dedicated for Program Integrity (PI) activities in FYs 2017-2019 and reduced the authorized funding for PI activities in FY 2021. It also expanded the activities which may be funded by this funding source. We are still awaiting the appropriated levels for FY 2017 and FY 2018.
821	Temporary Reauthorization of Disability Insurance Demonstration Project Authority	Extends authority to initiate DI demonstration projects through 2021, and continue such projects through 2022. BBA 822 requires the COSS to ensure all participation in demonstration projects is voluntary, and obtain informed written consent from all participants; revises reporting requirements for demonstration projects.	11/2/15	√			Effective upon enactment. On 9/19/16, released a Request for Information on a potential demonstration on musculoskeletal impairments.

TITLE	SUMMARY REQUIREMENTS	EFFECTIVE DATE	IMPLEM ENTED	SSA REG	SYS CHANGE	ACTIONS
822	Modification of Demonstration Project Authority	Requires the COSS to ensure all participation in demonstration projects is voluntary, and obtain informed written consent from all participants; revises reporting requirements for demonstration projects.  Submit annual report to the House Committee on Ways and Means and the Senate Committee on Finance by September 30 (formerly June 9).	11/2/15	√		Effective upon enactment. Annual report due to Congress on 9/30/16. Released on 9/22/16.
823	Promoting Opportunity Demonstration Project	This provision requires the COSS to establish a five-year demonstration project to test a benefit offset of \$1 for every \$2 of earnings in excess of a specific threshold. We are currently in the process of awarding implementation and evaluation contracts for POD and plan to begin recruitment for the demonstration in 2017.	1/1/17		√	Evaluation Request for Proposals (RFP) released and closed. Implementation RFP released 8/18/16 and closes 9/22/16. Plan to award contracts for implementation and evaluation in 12/16; Operations workload will begin in 2017. Developing and implementing Systems changes in FY 2017.
824	Use of Electronic Payroll Data to Improve Program Administration	Permits the COSS to establish exchanges with payroll data providers to obtain wage data to administer the disability and SSI programs and prevent improper payments; authorizes the COSS to require claimants to provide authorization to obtain payroll data.  NOTE: Individuals who provide authorization will be afforded protection from certain sanctions and penalties. Refusal to provide authorization or revocation of such authorization will negate this protection (in contrast to provisions in current law regarding access to financial data, failure to provide authorization for payroll data could not be used as a basis to deny benefits.)	11/2/16		√	√  We have obtained inter-component concurrence on our business process. Consequently, we will be moving forward to the next phase of the project and start working on defining the systems requirements. We continue working on the draft NPRM and the statement of work.
825	Treatment of Earnings Derived from Services	For purposes of an initial determination of Title II disability, establishes a rebuttable presumption that earnings were earned in the month in which the services were performed; in any other case, establishes the rebuttable presumption that earnings were earned in the month in which such earnings were paid.	9/24/16	√	√	√  Implemented Systems changes to eWork on 9/24/16. Provided training on the new policy/ procedure and published POMS. May publish regulations in 2017.
826	Electronic Reporting of Earnings		9/30/17		√	Continuing planning and analysis through FY 2016.

TITLE		SUMMARY REQUIREMENTS	EFFECTIVE DATE	IMPLEM ENTED	SSA REG	SYS CHANGE	ACTIONS
831	Closure of Unintended Loopholes (Aggressive Claiming)	Automatically deems a claimant who applies for retirement benefits to have applied for any spousal benefit for which he or she is eligible; automatically deems a claimant who applies for a spousal benefit based on age to have applied for his or her retirement benefit if he or she is eligible. Prohibits a person from receiving retroactive benefits for a period of voluntary suspension or benefits based on the earnings of an individual who has suspended his or her benefits during the suspension; prohibits an individual whose benefits are suspended from receiving benefits on any other record during the suspension.	4/30/16	√	√	√	Deemed Filing implemented 1/1/16 and Voluntary Suspense implemented 4/30/16. Will begin effort to automate the process in 2017, subject to funding. NPRM targeted for FY 2017.
832	Restrictions on who can be Medical Consultants (MCs)		11/2/16		√	√	Transition to only physicians being MCs and new Medical Advisor role will be implemented without regulation by 11/2/16. Published a proposed rule to implement BBA 832 on 9/9/16 as part of the Medical Evidence rule. Federal Register Notice extending SDM published on 8/25/16. Will publish a rule extending DEA until 2018 discontinuation by early November 2016. Planning and implementing necessary Systems changes.
	Requirement for MC/Psychological Consultant (PC) review in all claims. Ends Single Decision Maker (SDM)/Disability Examiner Authority (DEA)	Eliminates Single Decision Maker authority in the 19 states and 1 Federal site where the authority existed and Disability Examiner Authority in all states for QDD/CAL decisions. BBA 832 states that when there is evidence indicating the existence of a physical impairment, we must make every reasonable effort to ensure that a qualified physician has completed the medical portion of the case review and any applicable medical assessments. BBA 832 also states that when there is evidence indicating the existence of a mental impairment, we must make every reasonable effort to ensure that a qualified psychologist or psychiatrist has completed the medical portion of the case review and any applicable medical assessments. This requirement applies to all initial claims, reconsiderations, and continuing disability reviews (CDR).					
833	Reallocation of Payroll Tax Revenue		11/1/16-12/31/18	√			Effective upon enactment. No action needed.
834	Access to Financial Information for Waivers and Adjustments of Recovery	Requires the COSS to obtain a claimant's authorization to obtain financial institution records before waiving overpayment recovery under the "defeats the purpose" provision; permits SSA to refuse the waiver if the claimant refuses to grant such authorization.	3/1/216	√		√	Implemented 3/1/16. Drafting the business process for the automation phase and will automate in 2018.

TITLE		SUMMARY REQUIREMENTS	EFFECTIVE DATE	IMPLEM ENTED	SSA REG	SYS CHANGE	ACTIONS
841	Interagency Coordination to Improve Program Administration	Requires SSA and the Office of Personnel Management (OPM) to enter into an agreement that will allow SSA to withhold past-due disability benefits to offset any Federal Employee Retirement System (FERS) disability annuity overpayment caused by such disability benefits.	11/2/16			√	Working with OPM regarding the legal agreement. Implementation in 2017 pending OPM funding.
842	Elimination of Quinquennial Determinations Relating to Wage Credits for Military Service Prior to 1957	Eliminates the requirement that the COSS make quinquennial determinations for pre-1957 military service wage credits after the 2010 determination.  We notified the Appropriation Committee about this change and it is reflected in the FY 2017 President's Budget.	12/30/15	√			No action needed.
843	Certification of Benefits Payable to a Divorced Spouse of a Railroad Worker to the Railroad Retirement Board	Allows the COSS to electronically certify benefits due to a divorced spouse of a railroad worker to the Railroad Retirement Board.	11/2/15	√	√		Implemented 1/14/16. Continuing post-implementation activities. Released an emergency message and will publish POMS by end of the calendar year. NPRM targeted for FY 2017.
844	Technical Amendments to Eliminate Obsolete Provisions	Removes two obsolete provisions of the Social Security Act related to Medicare — the former §226(i) and §226A(c).	11/2/15	√			Effective upon enactment. Reviewed regulations and POMS.
845	Reporting Requirements to Congress	Requires SSA to submit three new annual reports to Congress:  1. Fraud and Improper Payment Prevention Report  2. Work-Related Continuing Disability Review Report  3. Overpayment Waiver Report  Include Report with annual budget.  Submit report to House Committee on Ways and Means and the Senate Committee on Finance.  Submit report to the House Committee on Ways and Means and the Senate Committee on Finance.	1/1/16				Will submit to Congress: -Fraud and Improper Payment Prevention Report with the annual budget for FY 2016-2021. -Work-Related Continuing Disability Review Report annually to the House Committee on Ways and Means and the Senate Finance Committee (Hill staff are aware this information is not immediately available at the end of a given year). -Overpayment Waivers Report, not later than January 1 each year, to the House Committee on Ways and Means and the Senate Finance Committee.
846	Expedited Examination of Administrative Law Judges (ALJs)		11/2/15-12/31/22				On 3/29/16, OPM opened the ALJ exam by posting the ALJ announcement on USA Jobs. There is no further action for SSA.

## APPENDIX G: AGENCY CRITICAL PRIORITIES FOR 2016-2017

### SUPERIOR CUSTOMER EXPERIENCE

#### I. Advance Customer Engagement

Our goal in advancing customer engagement is to improve the customer experience. When we reflect on the ways we advanced our customers' engagement through our 2015 – 2016 Critical Priorities, we delivered a myriad of options for customers to conduct SSA business with us. We set out on a path to reach this aspirational vision in the spring of 2015. We remained true to our commitment to improve the customer's experience by providing more options that resulted in:

- Decreased walk-in traffic to our field offices by automating the SS5 process;
- Over 100,000 customer requests through our Click to Callback service; and
- Flexible online options that offer more Medicare enrollment choices.

By reducing paper workloads and increasing automation of manual workloads, we sought to allow you the opportunity to focus more on serving customers' needs and less on back-office tasks. Our Agency Critical Priorities for 2016-2017 will expand customer engagement by providing options to allow the customers to choose how they engage with us — in-person, online, or over the telephone.

In doing so, we will continue to use technology to expand our service offerings through our Application Status (IAPS) Enhancements aimed to reduce the burden on field offices to answer Claims status questions. We will further reduce manual and paper workloads by expanding iAppeals to non-medical appeals. Finally, we will experiment with a new service concept called "Customer Connect", which seeks to anticipate customer needs and offer automated, just-in-time service based on customer data.

#### Activities

- Application Status (myAPS)
- Multifactor Authentication
- Message Center
- Click-to-Chat
- Registration, Appointment and Services for Representatives (RASR)
- Non-Medical iAppeals
- Redesign of *my Social Security*
- iSSI
- Expanded CET

#### II. Advance Service Delivery in Our Disability Programs



Advancing service delivery in our disability program means improving service through innovation, greater consistency and simplified, up-to-date policy. Our 2015-2016 Critical Eight Priorities focused on advancing service delivery for persons with disabilities by addressing timely, high quality hearing and appeals decisions. We recognize the financial, well-being and hardship impact of extended waits for disability decisions. Our applicants with disabilities are among the most vulnerable of the populations we serve. We continue to work aggressively to reduce wait times for hearing decisions. We deployed the following key initiatives as part of our 2015-2016 priorities to resolve this public service:



- Launched our plan for **C**ompassionate **A**nd **RE**sponsive **S**ervice (CARES), which increased our capacity to hear and decide cases, implemented innovations in our business process, and used innovative technology to better triage work and better balance workloads across the nation.
- Expanded the National Adjudication Team with more Senior Attorneys to prepare case summaries and on-the-record decisions.
- Initiated the 1,000+ page pilot designed to streamline large case files in ODAR.

Through this Agency Critical Priority, we will continue providing you with tools to make the right decision at the earliest point possible in the most effective and efficient manner. Building upon our work from the Critical Eight Priorities, this will include:

- Continuing the development of the Disability Case Processing System (DCPS), which will improve consistency, ensure continued quality, and provide greater transparency into processing of disability determinations at the Disability Determination Services (DDS).
- Developing ways to enhance and streamline our medical and vocational policies across the agency.
- Timely, high quality decisions are at the heart of our initiatives to reduce wait times and better serve the public. Our success is critical to the individuals with disabilities and their families.

#### Activities

- **C**ompassionate **A**nd **RE**sponsive **S**ervice (CARES)
- Disability Case Processing System (DCPS)
- Enhancing Medical and Vocational Policies

### III. Enhance Knowledge of Social Security Retirement and Disability Programs



Today, about 168 million people work and pay Social Security taxes and about 60 million people receive monthly Social Security benefits. Helping the public understand their benefits is at the core of maintaining support for the most successful domestic program in the history of our nation. This is why educating the public about our retirement and disability programs remain an essential element of our critical priorities.

As part of our 2015 - 2016 Critical Eight Priorities, we made significant advances in how we connected with the public. We leveraged existing technology to connect via electronic means including social media and other outlets. This increased awareness and excitement resulted in our receiving:

- More than 27,000 hits on our internal website;
- Over 250,000 subscribers to our Social Security Matters Blog; and
- Nearly 180,000 Twitter followers.

While we have initiated new and creative ways to connect with the public, we believe that YOU are our best spokesperson for educating them. Therefore, we want you to be knowledgeable, prepared, and comfortable sharing information about our programs and services with those we serve, members of the community, including your family and friends.

We are building on the work we started with the Critical Eight Priorities to accomplish even more through our 2016-2017 Agency Critical Priorities. To accomplish this, we are expanding our One Voice initiative to provide you with readily available information and tools to help you to feel confident talking about our programs and services.

## Activities

- Brand Strategy: Securing Today and Tomorrow
- One Voice

## IV. Enhance Quality and Payment Accuracy for Our Customers

Across Social Security we share one common goal: to make the right payment to the right person at the right time. It's the heart of our mission, and the foundation of our programs. As good stewards of taxpayer dollars, we must do quality work and accurately administer our programs.

This priority dedicates our focus towards strengthening the quality of our work to ensure the accuracy of our payments. We identified the leading causes of improper payments and significant quality issues and selected workloads where we, collectively, can make meaningful progress over the next 12 months. Because of your dedication and efforts, we continue to thrive in this area. Our payment accuracy rates are very high, especially for our retirement and survivors programs, where more than 99 percent of our payments are error-free.

Many of you have provided recommendations on improving our quality and accuracy. Whether you submitted your ideas through the Commissioner's Challenge Committee (C<sup>3</sup>), or gave recommendations to your component leadership or office manager, we appreciate your valuable input. We have incorporated many of your ideas as part of this Agency Critical Priority for 2016-2017.

Building on our current efforts and processes, we will focus on two key areas: (1) combating the leading causes of improper payments, and (2) improving quality and program integrity. We will work on a range of efforts across these two-targeted areas (reflected below). This will allow us to improve our business processes and find ways to work more efficiently. Additionally, we will begin to use data from external sources in our business processes and gradually depend less on self-reporting by our beneficiaries. Last, we will clarify our instructions for staff who process the most complex cases and modernize our policies to support more timely and accurate decisions.

## EXCEPTIONAL EMPLOYEES

### V. Invest in Our Employees



As we often say, you, our employees are our most valuable asset and the foundation of the agency. Our customers rely on you every day to deliver the compassionate, quality service we are known for. Whether you directly serve our customers from the American public, or provide support to the employees who do, we want to ensure you have the skills, expertise, and opportunity to be successful in achieving your career goals and aspirations.

We aspire to be an employer of choice attracting and retaining employees who commit to our mission, represent and appreciate the diversity of the public we serve, pledge to provide quality customer service, and enjoy a lifetime career with our agency. As part of our 2015-2016 Critical Eight Priorities, we initiated the following career development efforts to support you in reaching your career goals:

- Launched our SkillsConnect Pilot Program which matched over 380 applicants with over 65 projects.
- Implemented the SSA Mentoring Program - over 2,000 employees participated.
- Our Job Experience Learning Program (JELP) with over 280 participants since the program's launch.

We must continue to develop a strong talent pool across the agency to sustain our organization now and into the future. In support of our vision and building on the work initiated as part of the Critical Eight Priorities, we will expand and improve our recruitment, training, and development programs through our 2016-2017 Agency Critical Priorities. We remain committed to making training and development opportunities available across the agency.

Over the next 12 months, through our 2016-2017 Agency Critical Priorities, we will develop expanded career planning tools and resources to provide you with greater visibility into potential career paths and options. These tools will help you explore career options with the agency and actively plan your personal career path.

Our expanded efforts will also include our continued focus on employee engagement and succession planning. We want our employee engagement initiatives to result in a stronger, more fulfilling relationship with the agency for all employees. As such, we will focus on strengthening our collaborative efforts and cultivating an environment where you feel appreciated and valued.

We place a high priority on career growth and developing future leaders. Our succession-planning activities will focus on strengthening the leadership pipeline and identifying advancement and leadership opportunities at all levels of the organization. We must be able to identify talented individuals and help them prepare to assume key leadership positions across the agency.

### Activities

- Employee Development
- Employee Engagement
- Headquarters Detail Portal
- Leadership Education And Development for Supervisors (LEADS)
- MySSA Career
- Streamlined Individual Development Plan (IDP)
- Succession Planning

## INNOVATIVE ORGANIZATION

### VI. Upgrade Our Foundational Infrastructure



The demands for our services continue to grow at a rate that challenges our resources. In order to serve our customers more effectively, we must be innovative in our use of technology and continue to emphasize efficiency and quality-enhancing solutions. We are proud of the great strides we made in this area through our 2015-2016 Critical Eight Priorities. Our efforts over the past 16 months helped us to launch the following key efforts to assist with improving our infrastructure:

- IT Investment Process (ITIP) represents our commitment to a transparent and effective process for investing in IT, which allows us to properly plan and construct our IT projects.
- IT Investment Review Board (IT IRB) reviews and prioritizes the agency's IT investments.
- Enterprise Program Management (EPMO) will assist with program management of our most critical projects and promote program management skills within the agency.
- Provided training to our employees to learn about the ITIP and about project planning and management process.

We will continue this important work over the next 12 months, working to refine and improve on these key initiatives. Our continued work in this area will help us to make wiser IT investments and provide more efficient and effective program management agency-wide. It will also help us to manage large projects in a consistent way to ensure we produce the desired outcome; and provide transparency so that we know how our resources are being used.

Additionally, our work involves making smart and sound decisions about which automation investments can produce the greatest good —considering the needs of both our employees and the public.

### Activities

- IT Investment Process (ITIP)
- Enterprise Program Management Office (EPMO)
- Innovative Organization

## VII. Modernize Our Informational Technology and Accelerate Data Driven Decisions



We must modernize our information technology (IT) in service of our aspirational vision of 2025. Like many government agencies, our current information technology makes it challenging to meet the changing service needs of the public. Modernization will help us to improve our efficiency, expand the skill sets for current employees and recruit additional technical experts to join us. Most importantly, IT modernization will help all of us better serve our customers—whenever and wherever they need us. A major part of modernizing our IT is also making better use of the data we have. Through our

2015-2016 Critical Eight Priorities, we were able to make the following significant enhancements to IT:

- Established and approved the structure for the Enterprise Data Warehouse (EDW) to provide you with easy-to-use integrated data and tools in support of data-driven decision-making.
- Populated the EDW with data from eight initial sources including Numident, Integrate Client, ROME, VIPr, iAccomodate, CHIP, Global Reference Tables, and DOORS.
- Established the Analytics Center of Excellence (ACE) to help train and employ you to utilize data to make informed decisions.

While EDWs, ACEs, and ITs might sound like alphabet soup to some, however, these efforts are powerful new resources. The EDW will help improve your access to and use of data. The ACE will help train and empower staff to effectively use data in everyday decision-making.

Here's an example of how ACE and use of the EDW helped us to make better decisions and to be more efficient: Last year, we created a marketing campaign for the new Internet Medicare Replacement Card application behind **my Social Security**. Using **my Social Security** sign-up data, we sent 17 million e-mails to every **my Social Security** account holder announcing the new service. This year, we are able to take a more targeted approach to our marketing campaign. With access to the EDW, we targeted **my Social Security** account holders by age (from the Numident), beneficiary status (from the MBR and SSR) and location (from **my Social Security** sign-up data) reducing the overall number of emails by half by focusing only on the target audience.

These modernization efforts from our Critical Eight Priorities will improve our efficiency through our 2016-2017 Agency Critical Priorities. This means better IT products to you, our employees, and our customers faster.

### Activities

- Enterprise Data Warehouse (EDW)
- Analytics Center of Excellence (ACE)



Securing today  
and tomorrow