

# **Annual Statistical Supplement, 2001**

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**to the Social Security Bulletin**

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**Social Security Administration  
Office of Policy  
Office of Research, Evaluation, and Statistics**



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# Contents

iv	<b>Abbreviations</b>
vii	<b>List of Tables</b>
xvii	<b>List of Charts</b>
1	<b>Highlights and Trends</b>
9	<b>Social Security</b>
22	<b>Supplemental Security Income</b>
<b>Health Care</b>	
43	Medicare
57	Medicaid
<b>Other Social Insurance and Veterans</b>	
63	Unemployment Insurance
66	Workers' Compensation
68	Temporary Disability Insurance
70	Black Lung Benefits
71	Veterans' Benefits
<b>Public Assistance</b>	
74	Temporary Assistance for Needy Families
77	Food Stamps
81	Low-Income Home Energy Assistance Program
<b>Technical Notes</b>	
343	Sampling Variability
345	OASDI Benefit Award Data
346	Poverty Data
349	Computing a Retired-Worker Benefit
355	<b>Glossary</b>
373	<b>Index to Tables</b>

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## Abbreviations

<b>AB</b>	Aid to the Blind
<b>ACF</b>	Administration for Children and Families
<b>AET</b>	Annual earnings test
<b>AFDC</b>	Aid to Families with Dependent Children
<b>AFDC-UP</b>	Aid to Families with Dependent Children-Unemployed Parents
<b>AIDS</b>	Acquired immunity deficiency syndrome
<b>AIME</b>	Average indexed monthly earnings
<b>AMW</b>	Average monthly wage
<b>APTD</b>	Aid to the Permanently and Totally Disabled
<b>BBA</b>	Balanced Budget Act of 1997
<b>BC/BS</b>	Blue Cross/Blue Shield
<b>CDR</b>	Continuing disability review
<b>CHAMPVA</b>	Civilian Health and Medical Program of the Department of Veterans Affairs
<b>CLIA</b>	Clinical Laboratory Improvement Act
<b>CMP</b>	Competitive medical plans
<b>CMS</b>	Centers for Medicare & Medicaid Services
<b>COBRA</b>	Consolidated Omnibus Budget Reconciliation Act
<b>COLA</b>	Cost-of-living adjustment
<b>CPI-U</b>	Consumer price index for all urban consumers
<b>CPI-W</b>	Consumer price index for urban wage earners and clerical workers
<b>CPS</b>	Current Population Survey
<b>DA&amp;A</b>	Drug addiction and alcoholism
<b>DI</b>	Disability Insurance
<b>DME</b>	Durable medical equipment
<b>DOE</b>	Department of Energy
<b>DOL</b>	Department of Labor
<b>DRG</b>	Diagnosis-related group
<b>EA</b>	Emergency Assistance
<b>EBT</b>	Electronic benefit transfer
<b>EPSDT</b>	Early and periodic screening, diagnostic, and treatment
<b>ESRD</b>	End stage renal disease
<b>FERS</b>	Federal Employees Retirement System
<b>FFS</b>	Fee for service
<b>FICA</b>	Federal Insurance Contributions Act
<b>FMAP</b>	Federal medical assistance percentage
<b>FPL</b>	Federal poverty level
<b>FQHC</b>	Federally qualified health center
<b>FRA</b>	Full retirement age

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<b>FUTA</b>	Federal Unemployment Tax Act
<b>FY</b>	Fiscal year
<b>GDP</b>	Gross domestic product
<b>HCBS</b>	Home and community based services
<b>HCFA</b>	Health Care Financing Administration
<b>HHA</b>	Home health agency
<b>HHS</b>	Department of Health and Human Services
<b>HI</b>	Hospital Insurance
<b>HIV</b>	Human immunodeficiency virus
<b>HMO</b>	Health maintenance organization
<b>ICF</b>	Intermediate care facility
<b>ICFs/MR</b>	Intermediate care facilities for the mentally retarded
<b>JOBS</b>	Job Opportunities and Basic Skills Training
<b>LIHEAP</b>	Low-Income Home Energy Assistance Program
<b>LTC</b>	Long-term care
<b>MBC</b>	Monthly benefit credited
<b>MBR</b>	Master Beneficiary Record
<b>MCCA</b>	Medicare Catastrophic Coverage Act
<b>MCCRA</b>	Medicare Catastrophic Coverage Repeal Act
<b>MN</b>	Medically needy
<b>MOE</b>	Maintenance of effort
<b>MSA</b>	Medical savings account
<b>NEW</b>	Native Employment Works
<b>NRC</b>	National Research Council
<b>OAA</b>	Old-Age Assistance
<b>OASDI</b>	Old-Age, Survivors, and Disability Insurance
<b>OASI</b>	Old-Age and Survivors Insurance
<b>OBRA</b>	Omnibus Budget Reconciliation Act
<b>OEO</b>	Office of Economic Opportunity
<b>OMB</b>	Office of Management and Budget
<b>PACE</b>	Programs of all-inclusive care for the elderly
<b>PESS</b>	Property essential to self-support
<b>PIA</b>	Primary insurance amount
<b>PIB</b>	Primary insurance benefit
<b>PPO</b>	Preferred provider organization
<b>PPS</b>	Prospective payment system
<b>PRO</b>	Peer review organization
<b>PSO</b>	Provider-sponsored organization
<b>QC</b>	Quarter of coverage

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<b>QDWIS</b>	Qualified disabled working individuals
<b>QI</b>	Qualified individual
<b>QMB</b>	Qualified Medicare beneficiary
<b>REACH</b>	Residential Emergency Assistance Challenge
<b>RVS</b>	Relative value scale
<b>SCHIP</b>	State Children's Health Insurance Program
<b>SECA</b>	Self-Employment Contributions Act
<b>SGA</b>	Substantial gainful activity
<b>SIPP</b>	Survey of Income and Program Participation
<b>SLMB</b>	Specified low-income Medicare beneficiary
<b>SMI</b>	Supplementary Medical Insurance
<b>SNF</b>	Skilled nursing facility
<b>SSA</b>	Social Security Administration
<b>SSI</b>	Supplemental Security Income
<b>TANF</b>	Temporary Assistance for Needy Families
<b>TEFRA</b>	Tax Equity and Fiscal Responsibility Act
<b>TFP</b>	Thrifty Food Plan
<b>TWP</b>	Trial work period
<b>USDA</b>	Department of Agriculture
<b>VA</b>	Department of Veterans Affairs
<b>VEAP</b>	Veterans' Educational Assistance Program
<b>WEP</b>	Windfall Elimination Provision
<b>WIN</b>	Work Incentive Program

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# List of Tables

## History of OASDI Provisions

### Coverage, Financing, and Insured Status

Page

84	2.A1	Type of covered employment and self-employment
86	2.A2	Noncontributory wage credits
87	2.A3	Annual maximum taxable earnings and actual contribution rates, 1937–2001 and thereafter
88	2.A4	Maximum annual amount of contribution, 1937–2001
89	2.A5	Tax credits, 1983–89
89	2.A6	Appropriations from general revenues and interfund borrowing
90	2.A7	Insured status (benefit eligibility)

### Benefit Computation and Automatic Adjustments

92	2.A8	Factors for indexing earnings, 1951–2001
94	2.A9	Indexed earnings for workers with maximum earnings, 1951–2001
95	2.A10	Average monthly wage (AMW) and average indexed monthly earnings (AIME)
96	2.A11	Formulas for computing PIA from AIME, increases in PIA based on cost-of-living adjustments, and minimum PIA, for workers who were first eligible (attained age 62, became disabled, or died) in 1979 or later
97	2.A11.1	Computation of PIA based on Windfall Elimination Provision (WEP)
98	2.A12	Special minimum PIA: Formula applies to years of coverage
100	2.A13	Formulas for computing maximum family benefit from PIA, and increases in maximum based on cost-of-living adjustments, for workers who attained age 62 or died (before attaining age 62) in 1979 or later
100	2.A14	Formulas for computing maximum family benefit, and increases in maximum based on cost-of-living adjustments, for workers first eligible for disability benefits in 1979 or later
101	2.A15	Formulas for computing PIA from creditable earnings after 1936
102	2.A16	Formulas for computing PIA from AMW based on earnings after 1950, and percentage increases in PIA
104	2.A17	Minimum PIA and maximum family benefit for workers who attained age 62, were first eligible for disabled-worker benefits, or died before 1979
105	2.A18	Automatic adjustment provisions
107	2.A19	Cumulative effect of statutory and automatic increases in benefits: \$100 base benefit

### Benefit Types and Levels

109	2.A20	Monthly benefits for retired and disabled workers
110	2.A21	Monthly benefits for spouses and children of retired and disabled workers
112	2.A22	Monthly benefits for survivors of deceased workers
116	2.A23	Monthly benefits for transitionally insured workers and their spouses and surviving spouses, aged 72 before 1969
116	2.A24	Monthly benefits for individuals and couples insured for special age-72 (Prouty) benefits
117	2.A25	Lump-sum benefits and vocational rehabilitation services
118	2.A26	Monthly benefit amount for selected beneficiary families with first eligibility in 2000, by average indexed monthly earnings for selected wage levels, effective December 2000
119	2.A27	Minimum and maximum monthly retired-worker benefits payable to individuals who retired at age 62, 1957–2001
120	2.A28	Minimum and maximum monthly retired-worker benefits payable to individuals who retired at age 65, 1940–2001

### Effect of Current Earnings and Taxation of Benefits

122	2.A29	Earnings (retirement) test
124	2.A30	Earnings guidelines regarding substantial gainful activity (SGA), 1961–2001
125	2.A31	Taxation of Social Security benefits
126	2.A32	Taxation of Social Security benefits: Examples

---

## Supplemental Security Income

127 2.B1 Federal benefit rates

### Medicare

128 2.C1 Medicare cost sharing and premium amounts, 1966–2001

### Medicaid

129 2.C2 Federal medical assistance percentage and enhanced federal medical assistance percentage

## SSA Administrative Data

### Offices and Staff

130 2.F1 Number of SSA offices, 2000

130 2.F2 Number and percentage of SSA employees, by grade, September 30, 2000

130 2.F3 Number of work years, fiscal years, 1991–2000

### Claims Workloads

131 2.F4 Old-Age and Survivors Insurance, fiscal year 2000

131 2.F5 Disability Insurance, fiscal year 2000

131 2.F6 Supplemental Security Income, fiscal year 2000

### Service Delivery

132 2.F7 Accuracy rates and use of 800 telephone number, fiscal years 1995–2000

### Hearings and Appeals

133 2.F8 Workload of SSA's Administrative Law Judges (ALJs), fiscal years 1999–2001

133 2.F9 Number of hearing receipts, dispositions, and end-of-year pending cases, fiscal years 2000–2001

133 2.F10 Number of civil litigation cases, fiscal year 2000

133 2.F11 Number of SSA Appeals Council cases, fiscal years 1999–2001

## Social Welfare and the Economy

### Social Welfare Expenditures

134 3.A1 Gross domestic product and social welfare expenditures under public programs, fiscal years 1965–95

3.A2 Discontinued

135 3.A3 Social welfare expenditures under public programs, fiscal years 1965–95

136 3.A4 Private social welfare expenditures, by category and as a percent of gross domestic product (GDP), 1980–94

### Employment and Earnings

3.B1 Discontinued

3.B2 Discontinued

137 3.B3 Federal minimum wage rates under the Fair Labor Standards Act and average hourly earnings and average weekly hours for production workers in manufacturing, 1938–2000

### Interprogram Data

3.C1 Discontinued

3.C2 Discontinued

138 3.C3 Selected social insurance programs: Source of funds from contributions and transfers, 1965–2000

139 3.C4 Social Security and selected public assistance programs: Average monthly amount in current and 2000 dollars, 1950–2000

140 3.C5 Population aged 65 or older receiving OASDI benefits, SSI payments, or both, 1940–2000, ranked by state, December 2000

141 3.C6 Number and percent of OASDI beneficiaries also receiving federally administered SSI payments, by SSI category and type of OASDI benefit, December 2000



- 
- 142 3.C6.1 Number of persons aged 18–64 receiving OASDI benefits or federally administered SSI payments based on disability, by type of benefit, 1978–2000
- 143 3.C7 Number of persons aged 15 or older with Social Security benefits or with Supplemental Security Income, by age, sex, race, March 2000, and median annual benefit, 1999
- 144 3.C8 Number of persons aged 15 or older with Social Security benefits or Supplemental Security Income and number and percent of Hispanic origin, by age, sex, March 2000, and median annual benefit, 1999

### **Poverty**

- 145 3.E1 Weighted average poverty thresholds for nonfarm families of specified size, 1959–2000
- 146 3.E2 Number and percent of poor persons, by age, at end of 1959–1999
- 147 3.E3 Shares of money income from earnings and other sources for aged and nonaged families, 1999
- 148 3.E4 Current living arrangements of persons aged 65 or older, March 2000
- 3.E5 Discontinued
- 149 3.E6 Aged families receiving Social Security benefits, by share of income from benefits and race, 1999
- 3.E7 Discontinued
- 150 3.E8 Poverty guidelines for families of specified size, 1965–2001

## **Old-Age, Survivors, and Disability Insurance**

### **Trust Funds**

- 151 4.A1 Old-Age and Survivors Insurance, 1937–2000
- 152 4.A2 Disability Insurance, 1957–2000
- 153 4.A3 Combined OASI and DI, 1957–2000
- 154 4.A4 Total annual benefits paid, by type of benefit and trust fund, and as percent of personal income, 1937–2000
- 155 4.A5 Total annual benefits paid from OASI trust fund, by type of benefit, 1937–2000
- 156 4.A6 Total annual benefits paid from DI trust fund, by type of benefit, 1957–2000

### **Covered Workers**

- 157 4.B1 Workers, earnings, and Social Security numbers issued, 1937–2000
- 158 4.B2 Number and amount of earnings for wage and salary and self-employed workers, 1951–2000
- 159 4.B3 Number of workers and median annual earnings, by type of worker and sex, 1937–1998
- 160 4.B4 Percent of all workers and self-employed workers with total annual earnings below annual maximum taxable, by sex, 1937–1998
- 161 4.B5 Number of all workers, by age and sex, 1937–1998
- 162 4.B6 Median earnings of all workers, by age and sex, 1937–1998
- 163 4.B7 Number of wage and salary workers, by amount of taxable earnings and sex, 1992–1998
- 164 4.B8 Number of self-employed workers, by age and sex, 1951–1998
- 165 4.B9 Number of self-employed workers, by amount of taxable earnings and sex, 1992–1998
- 166 4.B10 Number of workers, taxable earnings, and contributions, by type of employment and state, 1998
- 167 4.B11 Number of workers, taxable earnings, and contributions, by type of employment, 1937–2000
- 168 4.B12 Number of workers, taxable earnings, and contributions, by type of employment and state, 1998

### **Insured Workers**

- 169 4.C1 Estimated number, by insured status, December 31, 1940–2001
- 170 4.C2 Estimated number, by insured status, age, and sex, 1970–2001
- 4.C3 Discontinued
- 4.C4 Discontinued
- 172 4.C5 Population in the Social Security area: Estimated number and percent fully insured, by age and sex, 1996–2001
- 173 4.C6 Period life table, 1998

### **Benefits in Current-Payment Status**

- 174 5.A1 Number and average monthly benefit, by type of benefit, race, age, and sex, December 2000
- 5.A2 Discontinued
- 185 5.A3 Number and average monthly benefit, with reduction for early retirement, by type of benefit, race, age,

- 
- and sex, December 2000
- 188 5.A4 Number and total monthly benefits, 1940–2000
- 189 5.A5 Number and average age, by type of benefit, December 2000
- 189 5.A6 Number and average monthly benefit, by type of benefit and race, December 2000
- 190 5.A7 Number and average monthly benefit for **women**, by type of benefit and race, December 2000
- 190 5.A8 Number and average primary insurance amount and average monthly benefit for persons with benefits based on **special minimum primary insurance amount**, by type of benefit, December 2000
- 5.A9 Discontinued
- 191 5.A10 Number and average monthly benefit for beneficiaries aged 60 or older, by type of benefit, age, and sex, December 2000
- 5.A11 Discontinued
- 5.A12 Discontinued
- 5.A13 Discontinued
- 192 5.A14 Number and percentage distribution of women aged 62 or older, by type of benefit and dual entitlement status, December 1960–2000
- 192 5.A15 Number and average monthly benefit for women aged 65 or older, by age, type of benefit, and dual entitlement status, December 2000
- 193 5.A16 Number and average monthly benefit for adult beneficiaries, by type of benefit, sex, and age, December 2000
- 194 5.A17 Number and average benefit for disabled beneficiaries, by type of benefit, 1957–2000

#### **Retired Workers**

- 195 5.B1 Number, average primary insurance amount, and average monthly benefit without reduction for early retirement and **with delayed retirement credit**, by age and sex, December 2000
- 196 5.B2 Number, average primary insurance amount, and average monthly benefit without reduction for early retirement and **without delayed retirement credit**, by age and sex, December 2000
- 197 5.B3 Number and average monthly benefit **before and after delayed retirement credit**, by age and sex, December 2000
- 198 5.B4 Number, percent, and average monthly benefit, by year of entitlement as retired worker and sex, December 2000
- 199 5.B5 Number, average age, and percentage distribution, by age and sex, 1940–2000
- 200 5.B6 Number and percentage distribution with and without reduction for early retirement, by **monthly benefit** and sex, December 2000
- 201 5.B7 Number and percentage distribution with and without reduction for early retirement, by **primary insurance amount** and sex, December 2000
- 202 5.B8 Number and average monthly benefit with and without reduction for early retirement, by sex, 1956–2000
- 203 5.B9 Number and percentage distribution, by monthly benefit, age, and sex, December 2000

#### **Retired Workers and Dependents**

- 204 5.C1 Number and percentage distribution, by type of benefit and primary insurance amount, December 2000
- 205 5.C2 Average monthly benefit, by type of benefit and sex, 1940–2000

#### **Disabled Workers**

- 206 5.D1 Number, percent, and average monthly benefit, by year of entitlement as disabled worker and sex, December 2000
- 207 5.D2 Number and percentage distribution, by monthly benefit and sex, December 2000
- 207 5.D3 Number and monthly benefits, by sex, 1957–2000
- 208 5.D4 Number, average age, and percentage distribution, by age and sex, 1957–2000
- 209 5.D4.1 Number and percentage distribution of disabled beneficiaries, by type of beneficiary and diagnostic group, December 2000
- 210 5.D5 Number and percentage distribution, by diagnostic group and sex December 2000
- 211 5.D6 Number and percentage distribution, by diagnostic group, age, and sex, December 2000

---

### Disabled Workers and Dependents

- 212 5.E1 Number and percentage distribution, by type of benefit and primary insurance amount, December 2000  
212 5.E2 Average monthly benefit, by type of benefit, age, and sex, 1957–2000

### Dependents and Survivors

- 213 5.F1 Number of **wives and husbands** and monthly benefits, by type of benefit, 1950–2000  
5.F2 Discontinued  
214 5.F3 Number and percentage distribution of **wives** with entitlement based on age, by monthly benefit and age, December 2000  
215 5.F4 Number of **children** and total monthly benefit, by type of benefit, 1940–2000  
5.F5 Discontinued  
216 5.F6 Average monthly benefit for **survivors**, by type of benefit, 1940–2000  
217 5.F7 Number and percentage distribution of **survivors**, by type of benefit and primary insurance amount, December 2000  
218 5.F8 Number of **widows and widowers** and total monthly benefit, by type of benefit, 1950–2000  
219 5.F9 Number, percent, and average monthly benefit, by year of entitlement as **nondisabled widow or widower**, December 2000  
219 5.F10 Number, percent, and average monthly benefit, by year of entitlement as **disabled widow or widower**, December 2000  
220 5.F11 Number and percentage distribution of **nondisabled widows**, by monthly benefit and age, December 2000  
221 5.F12 Number of **widowed mothers and fathers** and monthly benefit, by type of benefit, 1950–2000  
222 5.F13 Number and average monthly benefit for **nondisabled widows** aged 65 or older, by reduction status and limitation of benefit, December 2000

### Retired Workers with Dual Entitlement

- 223 5.G1 Number and percentage distribution of persons receiving both a retired-worker and secondary benefit with and without reduction for early retirement, by primary insurance amount and sex, December 2000  
224 5.G2 Number receiving both a retired-worker and secondary benefit, by type of secondary benefit, 1952–2000  
225 5.G3 Number and average monthly benefit for persons receiving both a retired-worker and secondary benefit, by type of secondary benefit, December 2000  
225 5.G4 Number, combined average monthly benefit, and retired-worker benefit as percent of total combined benefit, December 2000  
226 5.G5 Number and percentage distribution, by total combined monthly benefit and retired-worker benefit, December 2000

### Beneficiary Families

- 227 5.H1 Number and average monthly family benefit for selected family groups, 1945–2000  
228 5.H2 Number and average primary insurance amount and average monthly family benefit for selected family groups, December 2000  
229 5.H3 Number and percentage distribution of **retired-worker** and **disabled-worker families**, by monthly benefit for selected family groups, December 2000  
230 5.H4 Number and percentage distribution of **survivor families**, by monthly benefit for selected family groups, December 2000

### Geographic Data

- 231 5.J1 Estimated total benefits paid, by program, calendar year 2000  
232 5.J2 Number, by type of benefit, December 2000  
233 5.J3 Number and total monthly benefit for beneficiaries aged 65 or older, December 2000  
234 5.J4 Total monthly benefit, by type of benefit, December 2000  
235 5.J5 Number, by age, December 2000  
236 5.J5.1 Number, by race and sex, December 2000  
237 5.J6 Average and median monthly benefit for **retired workers** and number and percentage distribution, by monthly benefit, December 2000

---

	5.J7	Discontinued
238	5.J8	Average and median monthly benefit for <b>disabled workers</b> and number and percentage distribution, by monthly benefit, December 2000
239	5.J9	Average and median monthly benefit for <b>nondisabled widows and widowers</b> and number and percentage distribution, by monthly benefit, December 2000
240	5.J10	Number of <b>children</b> , by type of benefit, December 2000
241	5.J11	Number and total monthly benefit for beneficiaries in foreign countries, December 2000
242	5.J12	Number of disabled workers, by diagnostic group, December 2000
243	5.J13	Number and percentage distribution of disabled workers, by diagnostic group, December 2000
244	5.J14	Number, average and median monthly benefit, by type of disabled beneficiary, December 2000
		<b>Direct Deposit</b>
245	5.K1	Number and percent of beneficiaries, and average monthly benefit, by state and direct deposit status, December 2000
		<b>Representative Payee</b>
246	5.L1	Total number of OASDI beneficiaries and number and percent with representative payee, by type of beneficiary and age, December 2000
		<b>International Agreements</b>
247	5.M1	Number of beneficiaries and average monthly benefit under U.S. totalization agreements, by country involved in the agreement and type of benefit, December 1983–2000
		<b>Benefits Awarded, Withheld, and Terminated</b>
248	6.A1	Number, by type of benefit, 1940–2000
249	6.A2	Average primary insurance amount for retired workers and average monthly benefit for retired workers, disabled workers, and widows, 1940–2000
250	6.A3	Number and average monthly benefit, by type of benefit, age, sex, and race, 2000
252	6.A4	Number and average monthly benefit for <b>retired and disabled workers</b> , by age and sex, 2000
253	6.A5	Number and average monthly benefit with reduction for early retirement, by type of benefit, sex, and age, 2000
254	6.A6	Number, percentage distribution, and average monthly benefit for retired and disabled workers, by state, 2000
		<b>Retired Workers</b>
255	6.B1	Number of initial awards to retired workers aged 62-64, average primary insurance amount, average monthly benefit, and number of months of benefits withheld due to earnings, by age and sex, 2000
	6.B2	Discontinued
256	6.B3	Number and percentage distribution with and without reduction for early retirement, by <b>monthly benefit</b> and sex, 2000
257	6.B4	Number and percentage distribution with and without reduction for early retirement, by <b>primary insurance amount</b> and sex, 2000
258	6.B5	Number, average age, and percentage distribution, by age and sex, 1940–2000
		<b>Disabled Workers</b>
259	6.C1	Number and percentage distribution, by monthly benefit and sex, 2000
260	6.C2	Number, average age, and percentage distribution, by age and sex, 1957–2000
261	6.C3	Number and percentage distribution, by diagnostic group, age, and sex, 2000
	6.C4	Discontinued
	6.C5	Discontinued
	6.C6	Discontinued
262	6.C7	Number of applications, awards, and ratio of awards to applications and awards per 1,000 insured workers for selected years, 1960–2000

---

### Dependents and Survivors

- 263 6.D1 Number of **wives and husbands**, by type of benefit, 1950–2000
- 6.D2 Discontinued
- 264 6.D3 Number and average monthly benefit for **wives and husbands**, by age and sex, 2000
- 265 6.D4 Number of **children**, by type of benefit, 1957–2000
- 267 6.D5 Number and average monthly benefit for **children**, by type of benefit and age, 2000
- 268 6.D6 Number of **mothers and fathers**, by type of benefit, 1950–2000
- 269 6.D7 Number and average monthly benefit for **widows and widowers**, by age and sex, 2000
- 270 6.D8 Number of **widows and widowers**, by type of benefit, 1950–2000
- 270 6.D9 Number and average amount of lump-sum death payment awards, 1940–2000

### Benefits Withheld

- 271 6.E1 Number and percentage distribution of **retired workers** with benefits withheld, by monthly benefit, reduction for early retirement, and sex, December 2000
- 6.E2 Discontinued
- 6.E3 Discontinued
- 272 6.E4 Number of **beneficiaries** with benefits withheld, by reason for withholding payment, type of benefit, and age, December 2000
- 272 6.E5 Number of **wives, husbands, and children** with benefits withheld, by reason for withholding payment and type of benefit, December 2000

### Benefits Terminated

- 273 6.F1 Number of benefits terminated, by type, 1940–2000
- 274 6.F2 Number, by reason for termination and type of benefit, 2000
- 274 6.F3 Number of **wives, husbands, and children**, by reason for termination and type of benefit, 2000

### Supplemental Security Income

- 275 7.A1 Number of persons receiving federally administered payments, total amount, and average monthly amount, by source of payment, category, and age, December 2000
- 275 7.A2 Number of persons receiving federally administered payments, total amount, and average monthly amount, by source of payment and category, December 2000
- 276 7.A3 Number of persons receiving payments, by source of payment and category, 1974–2000
- 277 7.A4 Total annual amount of payments, by source of payment and category, 1974–2000
- 278 7.A5 Average monthly amount, by source of payment and category, 1975–2000
- 7.A6 Discontinued
- 7.A7 Discontinued
- 279 7.A8 Number of federally administered **awards**, by category and age, 1974–2000
- 279 7.A9 Number of persons receiving federally administered payments, by category, 1974–2000

### State Data

- 280 7.B1 Number of persons receiving federally administered payments and total annual amount, by category, 2000
- 281 7.B2 Number of persons receiving state-administered supplementation and total amount of payments, by category, 2000
- 282 7.B3 Number of persons receiving federally administered payments and average monthly amount, December 2000
- 7.B4 Discontinued
- 7.B5 Discontinued
- 7.B6 Discontinued
- 283 7.B7 Total amount, federal payments, and state supplementation, calendar year 2000
- 284 7.B8 Number of **blind and disabled persons under age 18** receiving federally administered payments, December 2000
- 285 7.B9 Number of federally administered **awards**, by category and age, 2000

---

## Benefit Distributions

- 286 7.C1 Number and percentage distribution of **adult individuals** and **persons under age 18** receiving federal SSI payments, by category and monthly amount, December 2000
- 286 7.C2 Number and percentage distribution of **couples** receiving federal SSI payments, by category and monthly amount, December 2000

## Other Income Sources

- 287 7.D1 Persons receiving both federally administered payments and other income, average monthly amount of income, by source, category, and age, December 2000
- 288 7.D2 Percent of persons receiving both federally administered payments and Social Security benefits, average monthly amount of benefits, by category, age, and state, December 2000

## Recipient Characteristics

- 7.E1 Discontinued
- 289 7.E2 Number and percentage distribution of federally administered **awards**, by sex, age, and category, 2000
- 290 7.E3 Number and percentage distribution of persons receiving federally administered payments, by sex, age, and category, December 2000
- 291 7.E4 Number and percentage distribution of persons with **representative payees** receiving federally administered payments, by category and age, December 2000
- 291 7.E5 Number and percentage distribution of persons receiving federally administered payments, by category, age, and **living arrangement**, December 2000
- 291 7.E6 Number of **noncitizens** receiving federally administered payments as a percent of SSI recipients, by category, 1982–2000

## Disability

- 292 7.F1 Number and percentage distribution of **blind and disabled persons under age 65** receiving federally administered payments and not transferred from prior state programs, by diagnostic group, December 2000
- 293 7.F2 Number and percentage distribution of **blind and disabled persons under age 65** receiving federally administered payments, by diagnostic group, age, and sex, December 2000
- 294 7.F3 Number of persons receiving special Supplemental Security Income payments and extended Medicaid coverage, for selected months, 1982–2000
- 295 7.F4 Number of persons receiving special Supplemental Security Income payments and extended Medicaid coverage, by age, sex, and types of earned and unearned income, December 2000
- 296 7.F5 Number of persons receiving special Supplemental Security Income payments and extended Medicaid coverage and average monthly earnings, by state, December 2000

## Health Care Programs

### Medicare

#### Trust Funds

- 297 8.A1 Hospital Insurance, 1966–2000
- 298 8.A2 Supplementary Medical Insurance, 1966–2000

#### Enrollment, Utilization, and Reimbursement

- 299 8.B1 Hospital Insurance and Supplementary Medical Insurance: Aged persons enrolled, served, and amount reimbursed, by type of coverage and service, 1967–1998
- 300 8.B2 Hospital Insurance and Supplementary Medical Insurance: Disabled persons enrolled, served, and amount reimbursed, by type of coverage and service, 1974–1998
- 301 8.B3 Hospital Insurance and Supplementary Medical Insurance: Number of enrollees, by state, July 1, 1980–2000
- 303 8.B4 Hospital Insurance and Supplementary Medical Insurance: Number of persons aged 65 or older enrolled, by age, sex, and race, selected years, July 1, 1980–1999
- 304 8.B5 Hospital Insurance and Supplementary Medical Insurance: Number of disabled persons and persons with

- 
- 8.B6 end stage renal disease under age 65 enrolled, by age, sex, and race, selected years July 1, 1980–1999
  - 8.B6 Discontinued
  - 8.B7 Discontinued
  - 305 8.B8 Hospital Insurance: Average covered charge per covered day of care in short-stay hospitals (1990–2000) and skilled nursing facilities (1975–2000), by state
  - 307 8.B8.1 Hospital Insurance: Short-stay hospital discharges, by state, fiscal years 1990–2000
  - 308 8.B9 Supplementary Medical Insurance: Number of reimbursed bills, charges, and amount reimbursed, by type of service and type of beneficiary, 1992–2000
  - 310 8.B10 Supplementary Medical Insurance: Claims received by carriers and assignment rates, 1969–2000
  - 310 8.B11 Supplementary Medical Insurance: Reasonable charge determination for SMI claims assigned and unassigned for aged and disabled persons, 1971–2000
  - 311 8.B12 Supplementary Medical Insurance: State buy-ins, 1991–2001

### **Participating Facilities**

- 312 8.C1 Hospital Insurance and Supplementary Medical Insurance: Number of facilities and beds, by participating providers, December 1967–2000
- 313 8.C2 Hospital Insurance: Number of participating hospitals and beds per 1,000 enrollees, by state, December 2000
- 314 8.C3 Hospital Insurance and Supplementary Medical Insurance: Number of participating skilled nursing facilities, home health agencies, independent laboratories, and end stage renal disease facilities, by state, December 2000

## **Medicaid**

### **Recipients**

- 315 8.E1 Unduplicated number of recipients, total vendor payments, and average amounts, by type of medical service, fiscal years 1972–1998
- 316 8.E2 Unduplicated number of recipients, total vendor payments, and average amounts, by type of eligibility category, fiscal years 1972–1998

### **State Data**

- 317 8.H1 Number of recipients, amount of payments, and average amount per recipient, by state, fiscal year 1998

## **Other Social Insurance and Veterans**

### **Unemployment Insurance**

- 9.A1 Discontinued
- 318 9.A2 Summary data on state programs, 1999
- 319 9.A2 Summary data on state programs, 2000
- 9.A3 Discontinued

### **Workers' Compensation**

- 320 9.B1 Coverage, benefits, and costs, 1940–1999
- 321 9.B2 Benefits, by state, 1996–1999
- 322 9.B3 Type of insurer and medical benefits, by state, 1999

### **Temporary Disability Insurance**

- 323 9.C1 Selected data on state and railroad programs, 1998

### **Black Lung Benefits**

- 324 9.D1 Currently payable to miners, widows, and dependents, December 1970–2000
- 325 9.D2 Currently payable to miners, widows, and dependents, by state, December 2000
- 326 9.D3 Currently payable to miners and widows, by age, December 2000

---

## **Veterans' Benefits**

327 9.F1 Number of payments, by type of payment and age, 1940–2000

### **Public Assistance**

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

328 9.G1 Average monthly number of recipients, total amount of cash payments, and average monthly payment, 1936–1999

329 9.G2 Average monthly number of families and recipients of cash payments and total amount of payments, by state, 1999

### **Food Stamps**

330 9.H1 Number of persons participating, value of benefits, and average benefit per person, fiscal years 1962–2000

### **Low-Income Home Energy Assistance Program**

331 9.J1 Number of households receiving home energy assistance, by type of assistance and state, fiscal years 1997–1999

334 9.J1.1 Number of households receiving home energy assistance, by type of assistance, fiscal years 1982–1999

335 9.J2 Federal net allocations and amounts carried over, by state, fiscal years 1997–1999

338 9.J2.1 Federal net allocations and amounts carried over, fiscal years 1982–1999

339 9.J3 Estimated home emergency assistance obligations, by type of assistance and state, fiscal years 1997–1999

342 9.J3.1 Estimated home emergency assistance obligations, by type of assistance, fiscal years 1982–1999

### **Adult Assistance**

9.K1 Discontinued

### **General Assistance**

9.L1 Discontinued

### **Sampling Variability**

343 10.A1 Approximations of standard errors of estimated number of persons

344 10.A2 Approximations of standard errors of estimated percentage of persons from 1-percent file

344 10.A3 Approximations of standard errors of estimated percentage of persons from 10-percent file



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## List of Charts

### Income of the Aged

10	1	Sources of income, 2000
10	2	Income from Social Security, 2000
11	3	Share of income, by source, 2000
11	4	Poverty among Social Security beneficiaries, 2000

### Old-Age, Survivors, and Disability Insurance

12	5	OASDI beneficiaries, by type of benefit, December 2000
12	6	OASDI benefits awarded, by type of benefit, December 2000
13	7	OASDI beneficiaries, by age, December 2000
13	8	Average monthly OASDI benefit, December 2000

### Supplemental Security Income

15	1	Percentage distribution of federally administered SSI payments, by age, December 2000
15	2	Percentage distribution of federally and state administered SSI, by category, December 2000
16	3	Number of recipients with federally administered SSI payments, by age, 1974–2000



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## Highlights and Trends

### Social Security (OASDI)

Cost-of-living adjustment for December 2000	3.5 percent
Average monthly benefit, December 2000	
Retired workers	\$845
Widows and widowers, nondisabled	810
Disabled workers	786
<b>Employment and Earnings</b>	
Workers in OASDI covered employment, 2000	152.9 million
Average earnings, 2000	\$31,213
Earnings required in 2001 for—	
1 quarter of coverage	\$830
Maximum of 4 quarters of coverage	3,320
Earnings test exempt amounts for 2001	
Under age 65 for entire year	\$10,680
For months before attainment of age 65 in 2001	25,000
Beginning with month of attainment of age 65 in 2001	Earnings test eliminated
<b>Program Data</b>	
Number of beneficiaries, December 2000	
Old-Age, Survivors, and Disability Insurance	45.4 million
Old-Age Insurance	31.8 million
Retired workers	28.5 million
Survivors Insurance	7.0 million
Widows and widowers, nondisabled	4.7 million
Disability Insurance	6.7 million
Disabled workers	5.0 million
Benefit payments, 2000	
Old-Age, Survivors, and Disability Insurance	\$407.6 billion
Old-Age and Survivors Insurance	352.7 billion
Disability Insurance	55.0 billion
Administrative expenses, 2000	
Old-Age and Survivors Insurance	\$2.1 billion
As a percent of total benefits paid	0.6 percent
Disability Insurance	\$1.6 billion
As a percent of total benefits paid	3.0 percent

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## Social Security (OASDI)

### Program Trends

- In December 2000, 45,414,800 persons received Social Security benefits, an increase of 819,200 (1.8 percent) since December 1999, compared with an increase of 0.8 percent in the preceding year. This significant increase is related to the elimination of the earnings test in 2000 for persons who have reached the full retirement age.
- The number of retired workers increased by more than 700,000 in 2000 (2.6 percent), compared with an increase of 1.0 percent in 1999. The 28,499,000 retired workers represented 63 percent of all beneficiaries in December 2000. Another 10 percent were nondisabled widows and widowers (4,700,000).
- Seventy-one percent of the 28.5 million retired-worker beneficiaries received reduced benefits because of retirement prior to age 65. Relatively more women (75 percent) than men (68 percent) received reduced benefits.
- The number of persons aged 65 or older receiving Social Security benefits rose from 31.4 million in 1995 to 32.7 million in 2000 (4.0 percent). Beneficiaries aged 85 or older increased at a greater rate during the 5-year period (12.8 percent) from 3,576,000 in 1995 to 4,034,000 in 2000. In 2000, 39,500 centenarians were receiving Social Security.
- More than 19 million women aged 65 or older were receiving benefits in December 2000. Seven million (36.4 percent) were entitled solely to a retired-worker benefit, and another 5.5 million (28.9 percent) were dually entitled to a retired-worker benefit and a wife's or widow's benefit. About 6.6 million (34.7 percent) were receiving wife's or widow's benefits only.
- Almost 3 million children under age 18 were receiving benefits, including 1,346,100 children of deceased workers, 1,374,400 children of disabled workers, and 255,900 children of retired workers.
- In December 2000, 5,972,400 beneficiaries were receiving payments on the basis of disability—5,042,300 disabled workers, 728,700 disabled adult children, and 201,400 disabled widows and widowers. In addition, 165,100 spouses and 1,409,200 minor and student children of disabled workers were receiving benefits.
- The leading causes of disability for disabled workers were mental disorders other than mental retardation (27 percent), and musculoskeletal conditions (23 percent). About 11 percent had circulatory conditions and an additional 10 percent had diseases of the nervous system and sense organs.
- Average monthly benefits for December 2000, including the 3.5 percent COLA increase, were \$845 for retired workers, \$786 for disabled workers, and \$810 for nondisabled widows and widowers. Among retired workers, benefits averaged \$951 for men and \$730 for women. For disabled workers, average benefits were \$883 for men and \$661 for women.
- Average monthly family benefits for December 2000 were \$1,502 for a widowed mother or father and children; \$1,323 for a disabled worker, wife, and children; and \$1,640 for a retired worker, wife, and children.
- Total OASDI benefit payments for calendar year 2000 were \$407.6 billion. Payments from the OASI trust fund were \$352.7 billion—an increase of 5.5 percent from the \$334.4 billion paid in 1999.
- Benefit payments from the DI trust fund, from which benefits are paid to disabled workers, their spouses, and children, increased by 7.0 percent from \$51.4 billion in 1999 to \$55.0 billion in 2000.
- OASDI benefit awards in calendar year 2000 totaled 4,290,100, including 1,960,600 to retired workers, 456,900 to their spouses and children and 843,300 to survivors of insured workers. Benefits were awarded to 621,600 disabled workers and 407,600 of their spouses and children. Awards to disabled workers were 620,500 in 1999 and 608,100 in 1998.

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## Supplemental Security Income

Federal benefit rate change, effective January 2001

Cost-of-living adjustment	3.5 percent
Monthly amount for—	
Individual living in his or her own household	\$531
Couple with both members eligible	796

### Program Data

Total:

Benefits paid in 2000	\$31.6 billion
Number of recipients, December 2000	6.7 million
Average benefit, December 2000	\$385.52

Federally administered payments:

Benefits paid in 2000	\$30.7 billion
Number of recipients, December 2000	6.6 million
Average benefit, December 2000	\$378.82

Federal SSI payments:

Benefits paid in 2000	\$27.3 billion
Number of recipients, December 2000	6.3 million
Average benefit, December 2000	\$351.48

Federally administered state supplementation:

Benefits paid in 2000	\$3.4 billion
Number of recipients, December 2000	<sup>1</sup> 2.5 million
Average benefit, December 2000	\$112.16

State-administered supplementation:

Benefits paid in 2000	\$0.9 billion
Number of recipients, December 2000	<sup>2</sup> .7 million
Average benefit, December 2000	\$110.95

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

<sup>2</sup> Includes 83,500 persons receiving state supplementation only.

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## Supplemental Security Income

### Program Trends

- In December 2000, 6,601,700 persons received federally administered SSI payments—45,100 more than the previous year. Of the total, 2,010,900 (30 percent) were aged 65 or older; 3,744,000 (57 percent) were blind or disabled aged 18-64; and 846,800 (13 percent) were blind or disabled under age 18.
- The number of blind or disabled aged 18-64 rose by 53,000 (1.4 percent) between December 1999 and December 2000, while the number under age 18 remained virtually unchanged. In comparison, between December 1998 and December 1999, blind or disabled aged 18-64 increased by 1.2 percent, while blind or disabled under age 18 dropped by 4.5 percent.
- During 2000, 747,200 persons were awarded federally administered payments, a decrease of 1.4 percent from the previous year. Of the 2000 awards, 483,200 went to blind or disabled recipients aged 18-64, 144,600 to those blind or disabled under age 18, and 119,400 to recipients aged 65 or older.
- Total SSI payments were \$31.6 billion in 2000, up 2.0 percent from 1999. The 1999 increase over 1998 was 2.5 percent. Federal SSI payments in 2000 were \$27.3 billion (an increase of 1.8 percent over the previous year). Federally administered state supplementation totaled \$3.4 billion and state-administered supplementation \$892.7 million, increasing by 2.4 percent and 4.6 percent, respectively from the previous year's totals.
- In 2000, the leading causes of disability among the blind or disabled between the ages of 18 and 64, and those under age 18 were mental disorders and mental retardation. Among disabled recipients between the ages of 18 and 64, 25.7 percent had mental retardation as the primary diagnosis, and 34.4 percent were diagnosed with another mental disorder. These conditions were also the most frequent diagnoses for blind or disabled under age 18.

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## Health Care

### Medicare

Hospital Insurance (Part A):	
Total benefits paid in calendar year 2000	\$128.5 billion
Supplementary Medical Insurance (Part B):	
Total benefits paid in calendar year 2000	\$88.9 billion
Number of enrollees in July 2000, (one or both of Parts A and B)	39.6 million
Aged	34.3 million
Disabled	5.3 million
Administrative costs, 2000:	
Hospital Insurance	\$2.6 billion
As a percent of total benefits paid	2.1 percent
Supplementary Medical Insurance	\$1.8 billion
As a percent of total benefits paid	2.0 percent

### Medicaid

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

## Unemployment Insurance

2000	
Total payments	\$20.3 billion
Average—	
Weekly benefit amount (regular programs)	\$221
Duration of benefits	13.7 weeks
Weekly insured unemployment	2.1 million
Covered employment	127.9 million

## Workers' Compensation

1999	
Benefit payments:	
Total	\$43.4 billion
Compensation payments	25.3 billion
Medical and hospitalization	18.0 billion
Benefits paid by—	
Private insurance carriers	23.8 billion
State and federal funds	10.2 billion
Employers' self-insurance	9.3 billion
Covered workers per month	123.9 million
Costs as a percent of covered payroll	1.29 percent

## Temporary Disability Insurance

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

	Average weekly benefit, 1998	
	State fund	Private plans
California*	\$230	\$352
New York	\$147	\$185

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

## Black Lung

Basic benefit, miner or widow	\$500.50
Maximum family benefit	1,001.00
Part B (claims filed before July 1, 1973)	
Number of monthly benefits to miners, widows, and dependents, December 2000	89,400
Average monthly benefit, December 2000	\$518.60
Total benefits paid, calendar year 2000	\$509.3 million
Part C (claims filed before July 1, 1973 or later)	
Number of monthly benefits to miners and survivors, September 2000	51,700
Total benefits paid, fiscal year 2000	
Disability and survivors benefits	\$350.3 million
Medical benefits	75.6 million



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## Veterans' Benefits

Disability compensation or pension, 2000

Number of veterans with—

Service-connected disability	2,308,000
Non-service-connected disability	364,000

Monthly payment in 2001 for—

Service-connected disability	
10 percent disability	\$101
Total disability	2,107

Non-service-connected disability (maximum payment)

Without dependent	775
With one dependent and in need of aid and attendance	1,533

## Temporary Assistance for Needy Families

Total payments, 1999 \$22.8 billion

Average monthly number of—

Recipients	6.8 million
Families	2.6 million

Average monthly payment

Per recipient	\$277
Per family	742

## Food Stamps

Monthly benefits, beginning Oct. 1, 2000:

Four-person household with no income	\$434
Standard deduction	134

Fiscal year 2000

Average number of participants	17.2 million
Total benefits	\$15.0 billion

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## Low-Income Home Energy Assistance

In fiscal year 1999 the Department of Health and Human Services issued—

- \$1.06 billion in block grants to the 50 states and the District of Columbia;
- \$9.6 million in direct block grants to 130 Indian tribes and tribal organizations;
- \$1.5 million in block grants to the Commonwealth of Puerto Rico, Virgin Islands, America Samoa, Guam, and the Commonwealth of the Northern Mariana Islands; and
- \$20.6 million in leveraging incentive awards to 33 states, 23 tribes;
- \$5.6 million for Residential Emergency Assistance Challenge (REACH) program awards to 5 states; \$681,000 to 6 Indian tribes and tribal organizations; \$124,000 to 1 insular area; and \$512,000 for states' second and third year REACH administrative costs;
- \$174.6 million in emergency contingency funds to 26 states and \$699,000 to 18 Indian tribes and tribal organizations.

## Poverty

2000 weighted average poverty thresholds:

Individual, aged 65 or older	\$8,259
Couple, householder aged 65 or older	10,414
Family of four	17,601

Percent of population with income below poverty level, 1999:

All ages	11.8 percent
Children under age 18 living in families	16.3 percent
Persons aged 65 or older	9.7 percent

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

The Old-Age, Survivors, and Disability Insurance (OASDI) program provides monthly benefits to qualified retired and disabled workers and their dependents, and to survivors of insured workers. Eligibility and benefit amounts are determined by the worker's contributions to Social Security. Benefits are paid as an earned right to workers, their families and their survivors. There is no means test to qualify for benefits.

During 2000, more than 45 million people received cash benefits at a rate exceeding \$34 billion each month (\$408 billion annually). According to the latest Social Security Trustees Report, these cash benefits comprised just over 4 percent of the nation's gross domestic product. During the same year, approximately 153 million employees and self-employed workers, along with employers, contributed more than \$492 billion to the OASDI trust funds—through which contributions are credited and benefits are paid.

Social Security benefits are essential to the economic well-being of millions of individuals. Social Security pays benefits to more than 90 percent of those 65 or older. It is the major source of income (providing 50 percent or more of total income) for 64 percent of the beneficiaries. It contributes 90 percent or more of income for almost one-third of the beneficiaries, and is the only source of income for 20 percent of them (see charts 1–4 at the end of this section).

### **Contributions and Trust Funds**

A person contributes to Social Security either through payroll taxes or self-employment taxes under the Federal Insurance Contribution Act (FICA) or the Self-Employed Contribution Act (SECA). Employers match the employee contribution, while self-employed workers pay an amount equal to the combined employer-employee contributions. (Self-employed workers receive a special tax deduction to ease the impact of paying the higher rate). There is a maximum yearly amount of earnings subject to OASDI taxes, \$80,400 in 2001. There is no upper limit on taxable earnings for Medicare Hospital Insurance (HI). Employees whose contributions exceed the maximum taxable amount because they worked for more than one employer can receive refunds of excess FICA payments when they file their tax returns.

Taxes are allocated to the Old-Age (Retirement) and Survivors Insurance (OASI), the Disability Insurance (DI), and the Hospital Insurance (HI) Trust Funds. In addition to the taxes on covered earnings, OASI and DI trust fund revenues include interest on trust fund securities, income from taxation of OASI and DI benefits, certain technical transfers, and gifts or bequests.

By law, the OASI and DI trust funds may only be disbursed for:

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

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

### **Provisions for Railroad Retirement Board Beneficiaries**

The OASDI tables do not include a number of persons receiving Railroad Retirement benefits who would be eligible for Social Security benefits had they applied. The reason they have not applied is that receipt of a Social Security benefit would reduce their Railroad Retirement benefit by a like amount. The number of persons is not available, but is estimated to be less than 100,000.

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

- Tier 1—A basic Social Security level component equivalent to what would be paid under the Social Security Act on the basis of the employee's combined railroad and nonrailroad service, reduced by the amount of any monthly benefit under OASDI actually paid on the basis of nonrailroad work; and
- Tier 2—A "private pension" component payable over and above the Social Security equivalent, calculated on the basis of the number of years of railroad service.

### **Structure and Organization**

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

The Social Security Administration is headquartered in Baltimore, Maryland. Major headquarter components include the National Computer Center that contains SSA's mainframe computers that drive our systems, much of the executive staff for policy, programs and systems as well as field support components. SSA's field structure is divided into 10 geographic regions containing over 1,300 field installations in communities throughout the country. Office sizes range from large urban offices with 50 or more employees to remote resident stations staffed by one or two individuals. Each region is headed by a Regional Commissioner, and staffed with specialists to handle regional administrative tasks and to assist field offices with operational issues. In addition, there are teleservice centers servicing all regions. While physically located within the various regions, each teleservice center manages the public's Social Security business from throughout the nation using state of the art communications systems. Seven program service centers provide service and support for the field offices in some aspects of Social Security's workloads.

**Tables 2.F1 – 2.F11** provide administrative data: **Table 2.F2** summarizes data describing SSA's national workforce, and **table 2.F3** provides a historical record of work years committed to SSA's overall operations. **Table 2.F4** provides workload data for the Old-Age and Survivors Insurance programs, and **table 2.F5** similarly provides workload data for the Disability Insurance program. **Table 2.F7** provides data on the operation of SSA's teleservice centers.

### Significant Program Changes

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

#### Change in the Consumer Price Index Cost-of-Living Adjustment

The consumer price index (CPI), prepared by the Bureau of Labor Statistics (BLS) in the Department of Labor, provides the basis for an annual cost-of-living adjustment (COLA) in Social Security and Supplemental Security Income benefits. On September 28, 2000, the BLS announced their discovery of a software error used in the CPI calculation, affecting the calculation for months after 1998.

Section 308 of Public Law 106-554, enacted December 21, 2000, requires the Office of Management and Budget and federal agencies that administer benefit programs to determine whether the CPI computation error for 1999 resulted in a shortfall in payments to beneficiaries and to compensate beneficiaries for any such shortfall. The Social Security Administration (SSA) determined that the Decem-

ber 1999 2.4 percent cost-of-living increase would have been 2.5 percent in the absence of the 1999 CPI error. SSA also determined that the December 2000 3.5 percent cost-of-living increase was not affected by the CPI error. SSA issued one-time payments in July 2001 to compensate beneficiaries for any shortfall in their benefits experienced between January 2000 and July 2001. Beginning in August 2001, ongoing benefits were adjusted based on the recalculated CPI.

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

Public Law 106-182, The Senior Citizen's Freedom to Work Act of 2000, enacted April 7, 2000 eliminated the earnings test beginning with the month a beneficiary attains full retirement age (FRA), currently age 65. Elimination of this earnings test is effective for taxable years ending after December 31, 1999.

The earnings limit that applies in the year of attainment of FRA is based on the limits previously established for persons at FRA through age 69—\$17,000 in 2000; \$25,000 in 2001; and \$30,000 in 2002. Benefits are withheld at the rate of \$1 for every \$3 of earnings above these exempt amounts. In determining earnings for purposes of the annual earnings test under this legislation, only earnings before the month of attainment of FRA will be considered. The legislation also permits retired workers to earn delayed retirement credits for any months between the attainment of full retirement age and age 70 for which the worker requests that benefits not be paid.

Public Law 106-182 did not change the annual exempt amount for beneficiaries who are under FRA throughout the year, which continues to be pegged to increases in the average wage. This amount increased from \$10,080 in 2000 to \$10,680 in 2001. Withholding for beneficiaries subject to this earnings test is at \$1 for each \$2 of earnings over the exempt amounts.

#### Work Incentives Improvement Act

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

The Ticket to Work provisions of this legislation will be phased in over a 3-year period beginning January 1, 2001. The provisions include demonstration projects that will eventually apply a disability earnings test more directed toward individuals' earnings history and circumstances of

their reemployment. The Ticket to Work will emphasize and encourage rehabilitation efforts and will reimburse private vocational rehabilitation agencies for their services to beneficiaries attempting to return to work. Also beginning January 1, 2001, former beneficiaries may have their benefits resumed if their work activity ends within 5 years of the month their benefits stopped and they are still disabled.

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

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

The SGA threshold is part of the definition of disability that requires an individual to be unable to engage in substantial gainful activity to be eligible for benefits. Earnings of more than the top SGA level will ordinarily demonstrate that an individual is engaged in SGA. Earnings of less than \$300 per month will ordinarily demonstrate that an individual is not engaged in SGA. Earnings between \$300 and the top SGA level will require that consideration be given to circumstances related to the work activity.

A different definition of SGA applies to blind persons receiving Social Security disability benefits. Increases in the SGA amount for blind individuals are pegged to increases in the national average wage index and thus were not affected by the 1999 or subsequent rule changes. The level for blind individuals increased from \$1,170 in 2000 to \$1,240 in 2001.

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

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

## Coverage and Financing

In 2000, about 153 million persons worked in employment or self-employment covered under the OASDI program. In recent years, coverage has become nearly universal for work performed in the United States, including American Samoa, Guam, the Northern Mariana Islands, Puerto Rico, and the U.S. Virgin Islands. Approximately 96 percent of the American workforce are covered by OASDI. Workers excluded from coverage fall into five major categories:

- (1) Civilian federal employees hired before January 1, 1984,
- (2) Railroad workers (who are covered under the railroad retirement system, which is coordinated with Social Security),
- (3) Certain employees of state and local governments who are covered under their employers' retirement systems,
- (4) Domestic workers and farm workers whose earnings do not meet certain minimum requirements (workers in industry and commerce are covered regardless of the amount of earnings), and
- (5) Persons with very low net earnings from self-employment, generally under \$400 annually.

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

For most employees, taxes are withheld from wages beginning with the first dollar earned. The exceptions are domestic employees, election workers, and agricultural workers. In 2001, a domestic employee must earn \$1,300 from any single employer in a calendar year before FICA is withheld. Most election workers must earn \$1,100 in 2001 before FICA is withheld. Most agricultural workers wages are covered if the employer pays more than \$2,500 in total wages in a year or if the individual worker earns over \$150 in a year from a single employer.

Employees, their employers, and the self-employed each pay taxes on earnings in covered employment and self-employment up to an annual maximum taxable amount for OASDI. There is no upper limit on taxable earnings for Medicare Hospital Insurance (HI). The OASDI maximum taxable amount—\$80,400 in 2001—is updated automatically each year in relation to increases in the national average annual wage. The current FICA tax rate applicable to both employees and employers is 6.2 percent for OASDI (5.30 percent for OASI and 0.9 percent for DI), and 1.45 percent for HI.

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

A self-employed person pays the combined employee-employer rate of 12.4 percent for OASDI and 2.9 for HI under the Self-Employment Contributions Act (SECA). Two deduction provisions reduce the SECA and income tax liability of self-employed persons. The intent of these provisions is to treat the self-employed in much the same manner as employees and employers are treated for purposes of FICA and income taxes. The first provision allows a deduction from net earnings from self-employment equal to the amount of net earnings before the deduction, times one-half the SECA tax rate. The effect of this deduction is intended to be analogous to the treatment of the FICA tax paid by the employer, which is disregarded as remuneration to the employee for FICA and income tax purposes. The second provision allows an income tax deduction, equal to one-half of the amount of the SECA tax paid, which is designed to reflect the income tax deductibility of the employer's share of the FICA tax.

**Table 2.A5** describes income tax credits for 1984–89 intended to cushion the impact of increases in FICA and SECA taxes enacted in 1983. The SECA tax credits were replaced, effective 1990, by the deduction provisions described above. **Table 2.A6** outlines the history of provisions regarding appropriations from general revenues and interfund borrowing.

### Insured Status

To become eligible for his or her benefit and benefits for family members or survivors, a worker must earn a minimum number of credits based on work in covered employment or self-employment. These credits are described as quarters of coverage. In 2001, a quarter of coverage (QC) is credited for each \$830 in annual covered earnings, up to a maximum of four QCs for the year. Earnings of \$3,320 or more in 2001 will give the worker four QCs regardless of when the money is actually earned or paid during the year. The amount of earnings required for a QC is adjusted automatically each year in proportion to increases in the average wage level.

#### Fully Insured

Eligibility for most types of benefits requires that the worker be fully insured. To be fully insured a worker must have a number of QCs at least equal to the number of calendar years elapsing between age 21 (or 1950 if later) and the year in which he or she reaches age 62, becomes disabled, or dies—whichever occurs first. Under this require-

ment, workers who reach age 62 in 1991 or later need the maximum number of 40 QCs to be fully insured. For workers who become disabled or die before age 62, the number of QCs needed for fully insured status depends on their age at the time the worker is disabled or dies. A minimum of 6 QCs is required regardless of age.

#### Currently Insured

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

#### Disability Insured

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

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

### International Agreements

The President is authorized to enter into international Social Security agreements (also called "totalization" agreements) to coordinate the U.S. Old-Age, Survivors, and Disability Insurance (OASDI) program with comparable programs of other countries. The United States currently has Social Security agreements in effect with 18 countries. Agreements with several other countries are in progress.

#### Social Security Agreements and Effective Dates

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

International Social Security agreements have two main purposes. First, they eliminate dual Social Security coverage, the situation that occurs when a person from one country works in another country and is required to pay Social Security taxes to both countries on the same earnings. Each agreement includes rules that assign a worker's coverage to only one country.

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

**Table 5.M1** provides data on the number of beneficiaries receiving totalization payments, and average benefits.

### Benefit Computation and Automatic Adjustment Provisions

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

- (1) Indexing of earnings: The worker's annual taxable earnings after 1950 are updated, or indexed, to reflect the general earnings level in the indexing year—the second calendar year before the year in which the worker is first eligible; that is, first reaches age 62, becomes disabled, or dies. Earnings in years after the indexing year are not indexed but instead are counted at their actual value. A worker's earnings for a given year are indexed by multiplying them by the following ratio (indexing factor): The average wage in the national economy for the indexing year, divided by the corresponding average wage figure for the year to be indexed.

**Table 2.A8** shows the indexing factors applicable to the earnings of workers who were first eligible in 1988–2001. **Table 2.A9** shows indexed earnings for workers first eligible in 1994–2001 who had maximum taxable earnings in each year after 1950. For a more detailed technical description of an AIME computation, including a computation worksheet, see the Technical Note "Computing a Retired-Worker Benefit."

- (2) Determining AIME: The period used to calculate AIME equals the number of full calendar years elapsing between age 21 (or 1950, if later) and the year of first eligibility, usually excluding the lowest 5 years. Workers disabled before age 47 have between zero and four excluded years from the computation. At an absolute minimum, two years are used to compute AIME. The actual years used in the computation—the "computation years"—are the years of highest indexed earnings after 1950, including any years before age 22 or after age 61 as well as the year of disability or death. AIME is calculated as the sum of indexed earnings in the computation period, divided by the number of months in that period.

**Table 2.A10** provides a historical outline of provisions related to AIME and AMW, and describes variations in the number of dropout years. **Tables 2.A15** and **2.A16** describe AMW benefit computations based on the worker's nonindexed earnings after 1936 and 1950, respectively. (Very few persons currently being awarded benefits have PIAs computed under these old-start or new-start computation methods. These methods, particularly the new-start method shown in table 2.A16, are more frequently applicable in earnings re-computations for workers who reached age 62 before 1979.)

- (3) Computing the PIA: The formula used to compute the PIA from AIME is weighted to provide a higher PIA-to-AIME ratio for workers with comparatively low earnings. The formula applies declining percentage conversion rates to three AIME brackets. For workers who reach age 62, become disabled, or die in 2001, the formula provides a PIA equal to the sum of:

90 percent of the first \$561 of AIME, plus  
32 percent of the next \$2,820 of AIME, plus  
15 percent of AIME over \$3,381.

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

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

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

The benefit formula applicable to a worker depends on the year of eligibility (or death) rather than on the year benefits are first received. Thus the PIA of a worker retiring at age 65 in 2001 is calculated using the benefit formula that applies to all workers first eligible in 1998 (the "year of attainment" of age 62). The PIA derived from that formula is then increased by the COLAs effective for December, 1998, 1999, and 2000 to obtain the PIA effective at age 65. Subsequent recomputations of the worker's benefit, including additional earnings not originally considered, delayed retirement credits or additional COLA increases, all refer to the basic computation that originally applied, based on the year of attainment.

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

A cost-of-living increase in benefits generally is established each year if the consumer price index for urban wage earners and clerical workers (CPI-W), prepared by the Department of Labor, indicates a percentage increase (after rounding) of at least 0.1 percent between two specified quarters. The arithmetical mean of the CPI-W for July, August, and September in the year of determination is compared with the arithmetical mean of the CPI-W for the later of (a) July, August, and September in the year in which the last effective cost-of-living increase was established or (b) the 3 months of the calendar quarter in which the effective month of the last general benefit increase occurred. The percentage increase in the CPI-W, rounded to the nearest 0.1 percent, represents the size of the increase in benefits, effective for December of the year in which the determination is made.

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

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

### Alternative PIA Computation Provisions

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

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

*Windfall Elimination Provision PIA.*—WEP affects persons who receive a pension based on noncovered work after 1956 and Social Security benefits. First eligibility for the noncovered pension and Social Security benefits must be after December 31, 1985 for WEP to apply. WEP reduces the Social Security PIA upon which SSA benefits are based and affects all benefits paid on that record, except survivors. The WEP reduction ceases when entitlement to the pension payment ends, the wage earner dies, or the wage earner earns a total of 30 years of substantial Social Security earnings. The WEP reduction amount is never more than one-half of the noncovered pension.

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



Example: A retired worker with a noncovered pension of \$2,000 a month and less than 20 years of covered employment attains age 62 in 2001.

Normal PIA, based on AIME of \$800:

$$\begin{aligned} \$561 \times .90 &= \$504.90 \\ \$239 \times .32 &= \$76.48 \\ \text{PIA} &= \$581.30 \end{aligned}$$

WEP PIA, based on AIME of \$800:

$$\begin{aligned} \$561 \times .40 &= \$224.40 \\ \$239 \times .32 &= \$76.48 \\ \text{PIA} &= \$300.80 \end{aligned}$$

If a worker has more than 20 years of substantial covered earnings, the WEP PIA begins to increase. With the 21st year of substantial covered earnings, the first bend point percentage is increased by 5 percentage points. This rate of increase applies for each additional year of substantial covered earnings, through the 30th year of substantial earnings at which point WEP no longer applies. After 23 years of substantial coverage, for example, the first bend point percentage would be 55 percent. Thirty years of substantial earnings would yield a first bend point percentage of 90 percent (the normal percentage of the first bend point).

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

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

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

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

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

## Benefit Types and Levels

### Retired and Disabled Workers

The full retirement age (FRA) is the earliest age at which an unreduced retirement benefit is payable (sometimes referred to as the "normal retirement age"). The age for full retirement benefits is scheduled to rise gradually from age 65 to age 67, with the first incremental increase affecting workers who reach age 62 in the year 2000. Workers over age 62 who retire before FRA can receive reduced benefits. The monthly rate of reduction from the full retirement benefit (that is, the PIA) is 5/9 of 1 percent a month for the first 36 months immediately preceding FRA. The reduction rate is 5/12 of 1 percent a month for any additional months. The maximum overall reduction for early retirement will have risen from 20 percent to 30 percent by 2022, when age 67 becomes the full retirement age.

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

For workers who postpone their retirement beyond the full retirement age, benefits are increased for each month of nonpayment beyond that age. This increase is called a "delayed retirement credit," and is potentially available for any or all months following attainment of the full retirement age (currently a maximum of 60 months for persons age 65). The annual rate of increase for delayed retirement credits is 6-1/2 percent for workers who reach age 62 in 1999 or 2000, 7 percent in 2001 and 2002, and will eventually rise to 8 percent for workers reaching age 62 in 2005 or later.

### Spouses and Children of Workers

Spouses receive 50 percent of the worker's PIA (regardless of the worker's actual benefit amount), if the spouse has attained the full retirement age at entitlement to spousal benefits. The spouse of a retired or disabled worker can elect monthly benefits as early as age 62. These benefits are reduced at the rate of 25/36 of 1 percent a month for the first 36 months immediately preceding FRA and 5/12 of 1 percent for each additional month.

Children of retired or disabled workers are also eligible to receive monthly benefits. The term "child" refers to a child under the age of 18, a child aged 18–19 attending elementary or secondary school full time, or to an adult child,

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

Benefits are payable to unmarried divorced spouses of retirement age who were married at least 10 years to the worker. A divorced spouse benefit is excluded from family maximum provisions. Divorced spouses age 62 or older and divorced for 2 or more years (after marriage of 10 or more years) may be independently entitled on the record of the ex-spouse if the ex-spouse could be entitled if he or she applied.

### Survivors Benefits

Widows and widowers of fully insured workers are eligible for unreduced benefits at full retirement age (FRA), currently age 65. As with retired workers and spouses, widows' and widowers' FRA will gradually increase to age 67. Widows and widowers can elect reduced monthly benefits at age 60 or, if disabled, as early as age 50. Surviving divorced spouses can also receive benefits if married to the worker for at least 10 years and not remarried before age 60 (age 50 if disabled).

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

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

Children of deceased workers and mothers and fathers under FRA are eligible to receive monthly benefits up to 75 percent of the worker's PIA if the worker died either fully or currently insured. Mothers and fathers must be caring for

the worker's entitled child who is either under age 16 or disabled. A dependent parent aged 62 or older is eligible for monthly benefits equal to 82.5 percent of the worker's PIA. Each of two dependent parents can qualify for benefits equal to 75 percent of the deceased worker's PIA. Monthly benefits payable to survivors are reduced to conform to the family maximum benefit payable on the deceased worker's account. Benefits for a surviving divorced spouse, however, are disregarded when computing the maximum family benefit.

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

### Effect of Current Earnings on Benefits

Beneficiaries under age 65 with earnings in excess of certain exempt amounts may have all or part of their benefits withheld as a result of the annual earnings test (AET) provisions of the Social Security Act. For those aged 65 or older, however, there have been recent changes to AET provisions. Amendments in 1996 eased the impact of AET provisions, while changes in 2000 removed the AET altogether for beneficiaries aged 65 and older. Public Law 104-121, enacted March 29, 1996 substantially raised the exempt amounts under the annual earnings test for persons who have reached full retirement age. These amounts are \$12,500 in 1996; \$13,500 in 1997; \$14,500 in 1998; \$15,500 in 1999; \$17,000 in 2000; \$25,000 in 2001; and \$30,000 in 2002. After 2002, the annual exempt amount will be indexed to the growth in average wages. Benefits are withheld at the rate of \$1 in benefits for every \$3 of earnings above the age 65 exempt amount.

Public Law 106-182, enacted April 7, 2000 eliminated the earnings test beginning with the month a beneficiary reaches full retirement age (FRA). The annual earnings test that applies in the year one attains FRA is based on the

more generous annual limits established under P.L. 104-121 (including the \$1 for \$3 withholding rate). In determining annual earnings for purposes of the annual earnings test, only earnings before the month of attainment of age 65 will be counted.

Public Laws 104-121 and 106-182 did not change the annual exempt amount for beneficiaries who are under age 65 throughout the year. This annual amount continues to be pegged to increases in average wages. The amounts are \$10,080 in 2000, and \$10,680 in 2001. When the annual earnings limit affects working beneficiaries under age 65, benefits are withheld at the rate of \$1 for every \$2 of earnings above the exempt amount.

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

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

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

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

## Taxation of Benefits

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

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

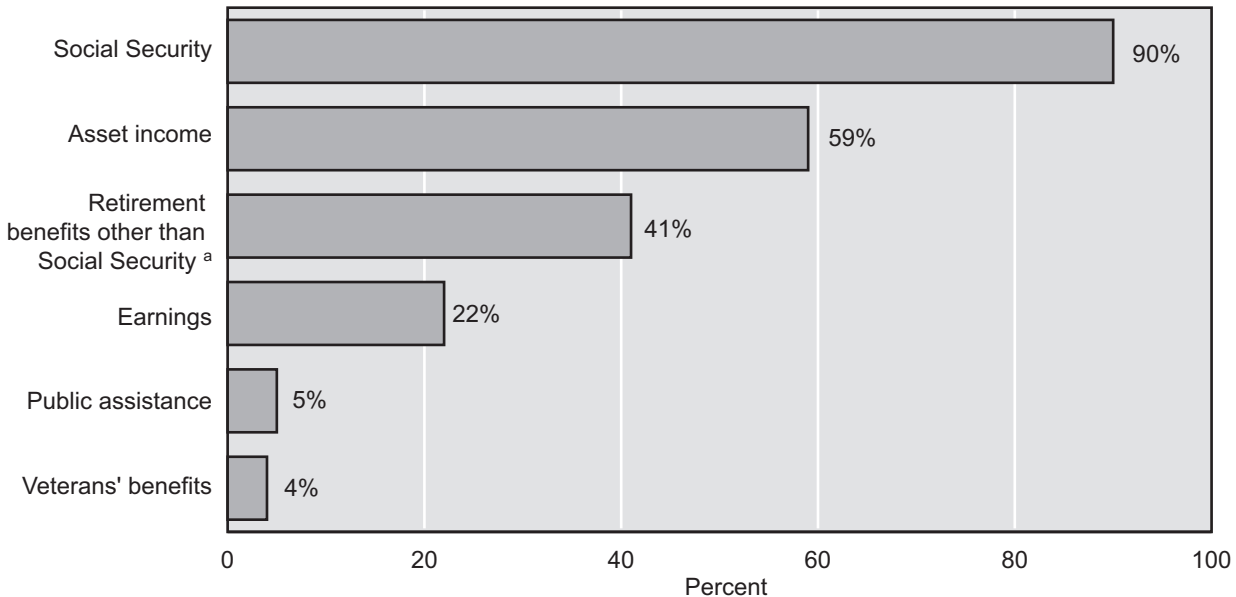
If members of a married couple are filing separately, they do not have a minimum threshold if they lived together any time during the tax year. The amount of benefits included in gross income is the lesser of 85 percent of Social Security or Tier 1 Railroad Retirement benefits, or 85 percent of all income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

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

### Income of the Aged

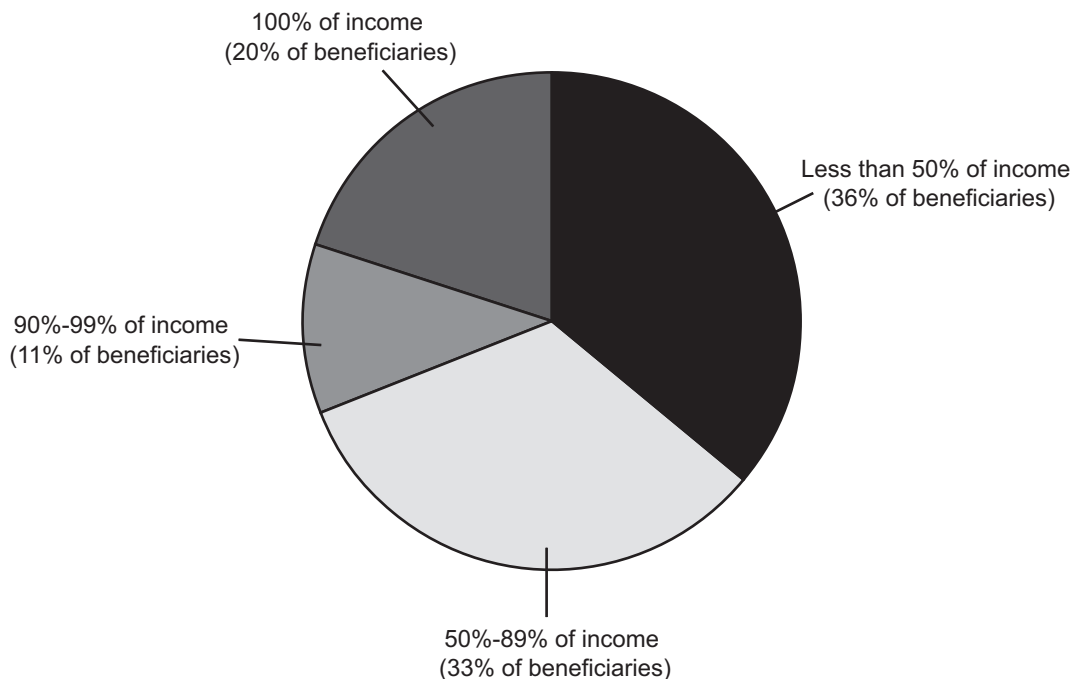
The following charts highlight the importance of Social Security benefits for the population aged 65 or older. The source of the data is the March 2001 Income Supplement from the Current Population Survey conducted by the U.S. Census Bureau. The data are presented in terms of either aged units or aged persons. An aged unit is either a married couple living together with the husband or wife aged 65 or older, or a person 65 or older, who does not live with a spouse.

**Chart 1.**  
Income sources of aged units, 2000

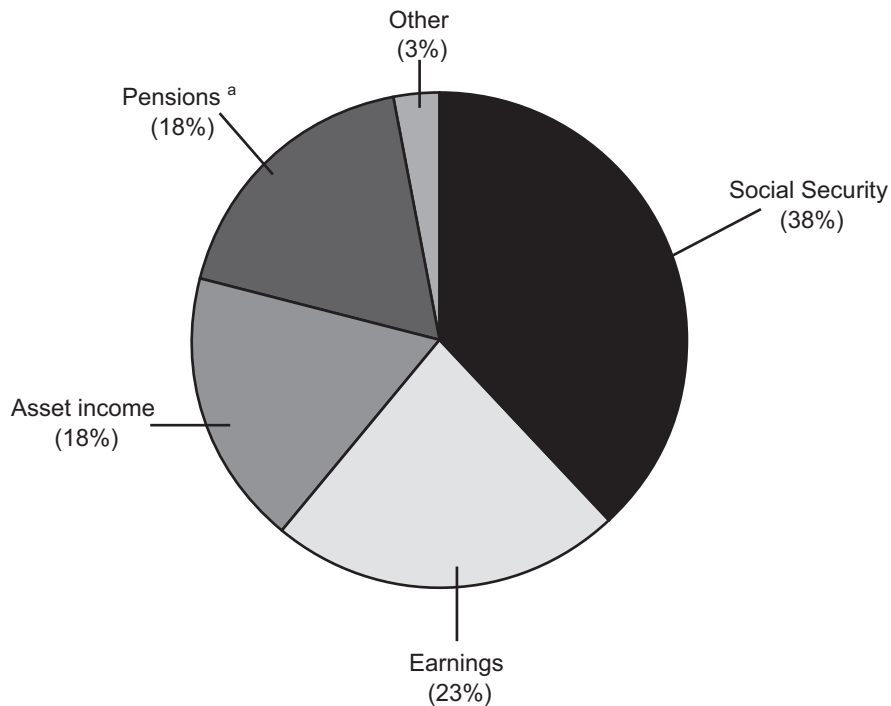


a. Includes private pensions and annuities, government employee pensions, Railroad Retirement, and individual retirement account, Keogh, and 401(k) payments.

**Chart 2.**  
Relative importance of Social Security income for aged units, 2000

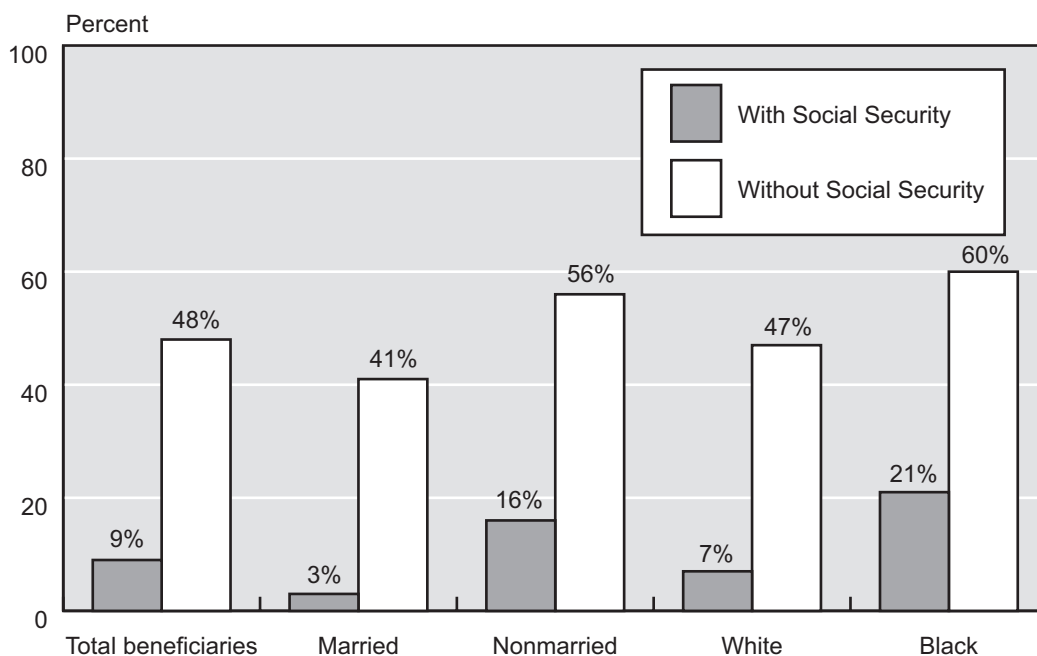


**Chart 3.**  
**Shares of aggregate income, by source, 2000**



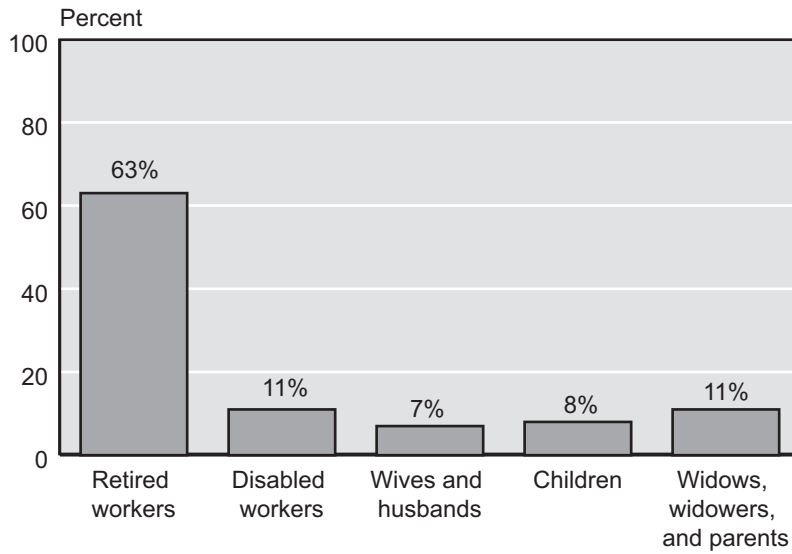
a. Includes private pensions and annuities, government employee pensions, Railroad Retirement, and individual retirement account, Keogh, and 401(k) payments.

**Chart 4.**  
**Poverty status of Social Security beneficiaries, 2000**



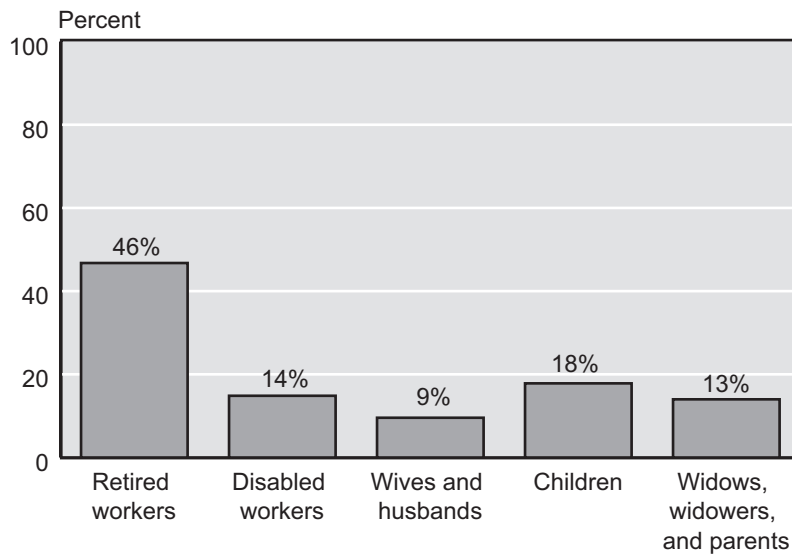
## Old-Age, Survivors, and Disability Insurance

**Chart 5.**  
OASDI beneficiaries, by type of benefit, December 2000



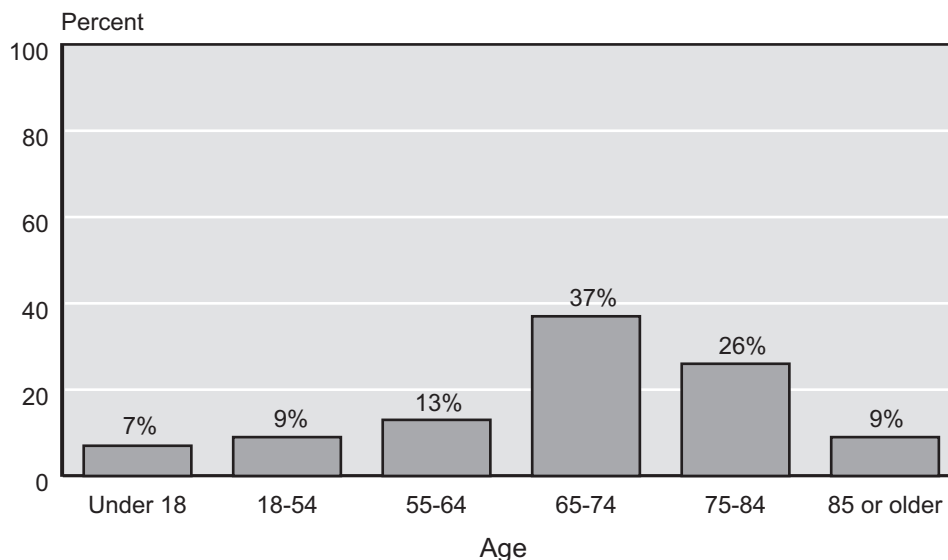
SOURCE: Table 5.A4.

**Chart 6.**  
OASDI benefits awarded, by type of benefit, 2000



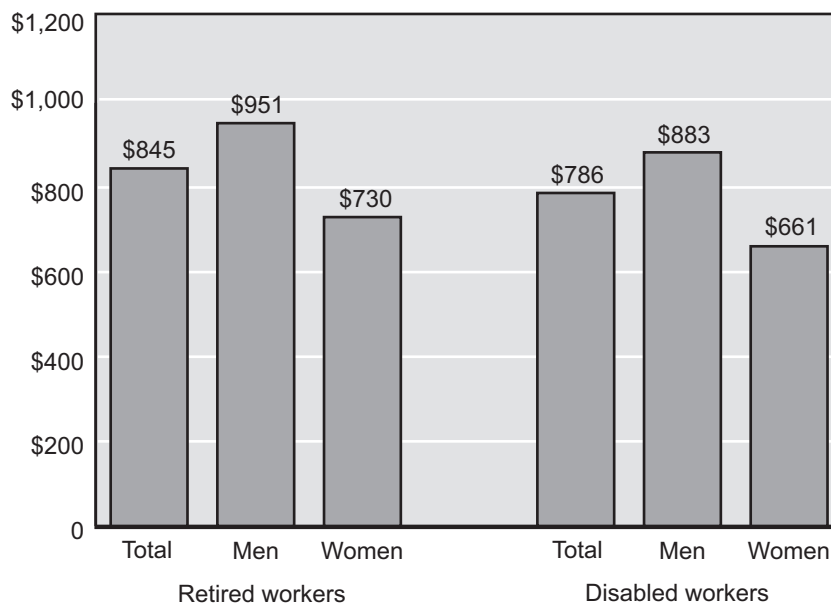
SOURCE: Table 6.A1.

**Chart 7.**  
**OASDI beneficiaries, by age, December 2000**



SOURCE: Table 5.J5.

**Chart 8.**  
**Average monthly OASDI benefit for retired and disabled workers, by sex, December 2000**



SOURCE: Tables 5.B8 and 5.E2.

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## Supplemental Security Income

The Supplemental Security Income (SSI) program provides income support to persons aged 65 or older, blind or disabled adults, and blind or disabled children. Eligibility requirements and federal payment standards are nationally uniform. The 2001 federal SSI benefit rate for an individual living in his or her own household and with no countable income is \$531 monthly; for a couple (with both husband and wife eligible), the SSI benefit rate is \$796 monthly.

Payments under SSI began in January 1974. It replaced the former federal-state adult assistance programs in the 50 states and the District of Columbia. Residents of the Northern Mariana Islands became eligible for SSI in January 1998.

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

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

The federal payment is based on the individual's countable income. The first \$20 monthly in OASDI benefits or other earned or unearned income is not counted. Also excluded is \$65 monthly of earnings plus one-half of any earnings above \$65. For example, a person living in his or her own household, whose sole income is a \$200 monthly OASDI benefit, would receive \$351 in federal SSI payments:

$$\$531 - (\$200 - \$20) = (\$531 - \$180) = \$351.$$

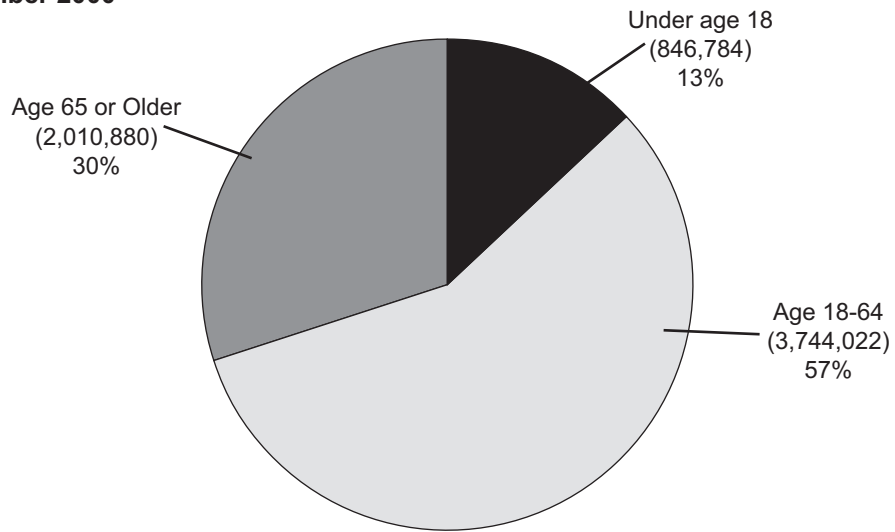
A person whose income consists of \$500 in gross monthly earnings would receive \$323.50 in federal SSI payments:

$$\begin{aligned} & \$531 - ((\$500 - \$85) / 2) = \$207.50 \text{ countable earnings.} \\ & \text{Federal benefit rate } \$531 - \$207.50 = \$323.50 \text{ federal SSI.} \end{aligned}$$

Individuals generally are not eligible for SSI if they have resources in excess of \$2,000 (or \$3,000 for a couple). Certain resources are excluded, most commonly a home, an automobile used for essential transportation, and household goods and personal insurance of reasonable value, burial plots and spaces, and life insurance. States have the option to supplement the federal SSI payment for all or selected categories of persons, regardless of previous state program eligibility. Initially, states were required to supplement to assure that recipients did not suffer a loss in total income from the former state programs. Most of these "converted" cases have now left the rolls.

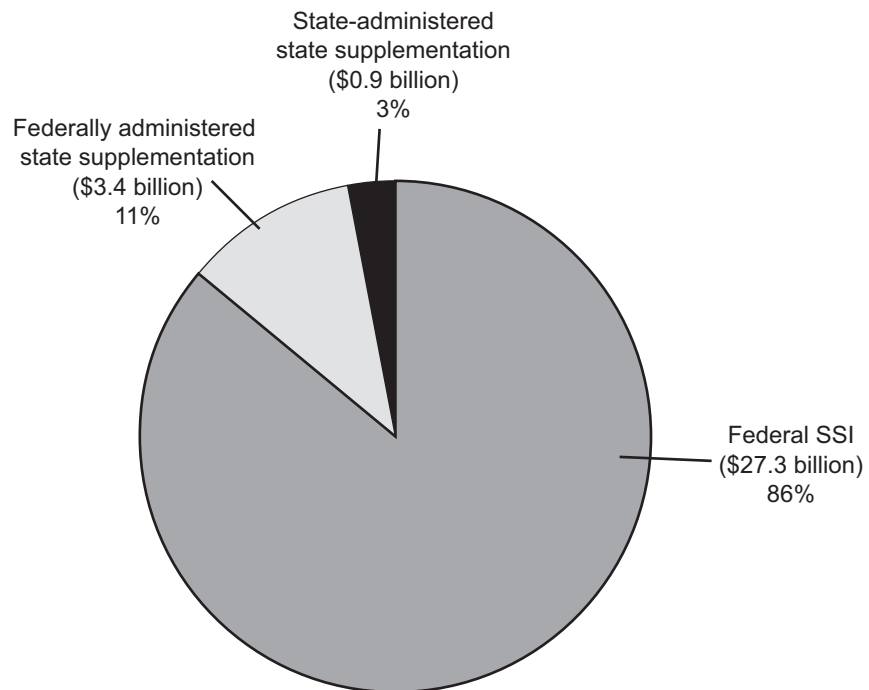


**Chart 1.**  
**Percentage distribution of recipients of federally administered SSI payments,**  
**by age, December 2000**



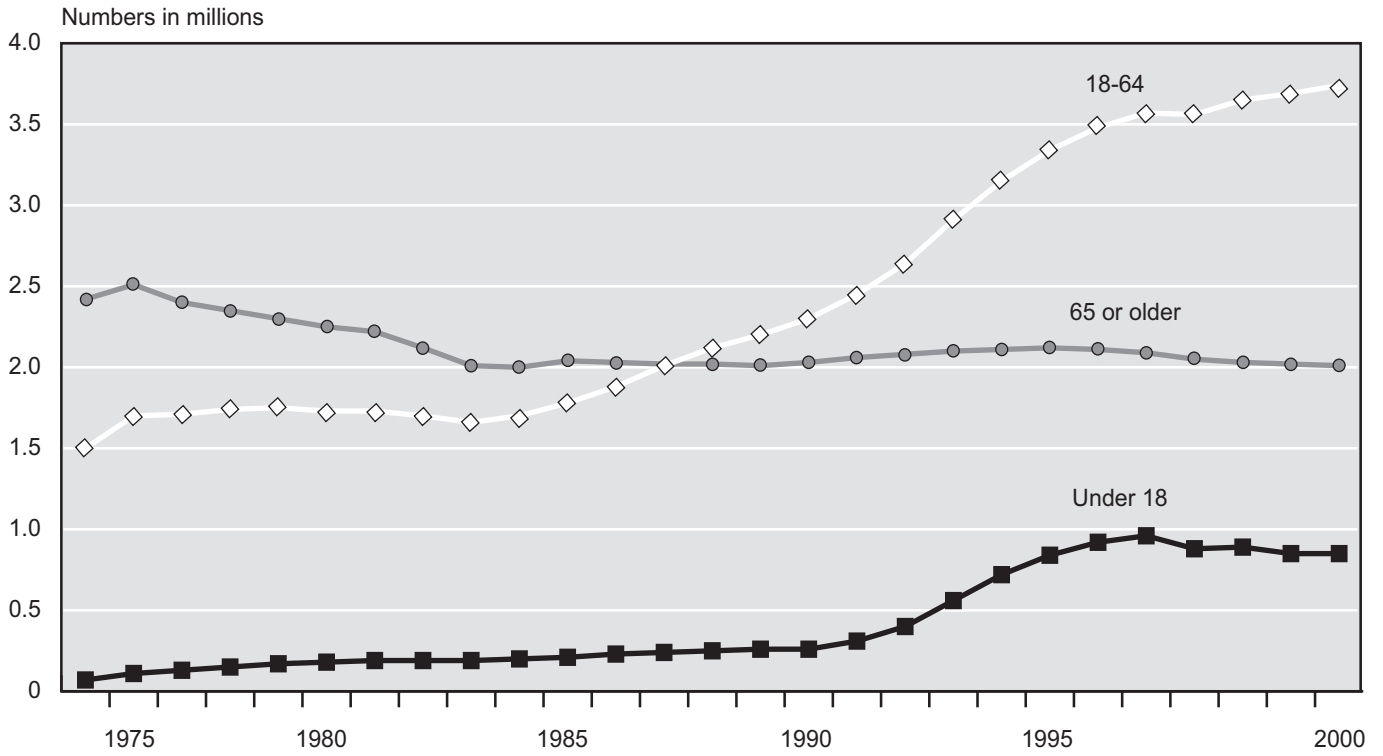
SOURCE: Table 7.A1.

**Chart 2.**  
**Amount of SSI payments, by source of payments, 2000**



SOURCE: Table 7.A4.

**Chart 3.**  
**Number and age of SSI recipients with federally administered payments, 1974-2000**



SOURCE: Table 7.A9.

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## SSI: History Of Provisions

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Act

### Basic Eligibility Requirements

**1972**

*Public Law 92-603,  
enacted October 30*

An individual may qualify for payments on the basis of age, blindness, or disability.

**Aged:** Any person aged 65 or older.

**Blind:** Any person with 20/200 or less vision in the better eye with the use of correcting lenses, or with tunnel vision of 20 degrees or less. An individual transferred from a state Aid to the Blind (AB) program is eligible if he/she received such state aid in December 1973 and continues to meet the October 1972 state definition of blindness.

**Disabled:** Any person unable to engage in any substantial gainful activity by reason of any medically determinable physical or mental impairment expected to result in death or that has lasted or can be expected to last for a continuous period of at least 12 months. For a child under age 18, eligibility is based on disability of severity comparable with that of an adult. An individual transferred from a state Aid to the Permanently and Totally Disabled (APTD) program to SSI is also eligible if he/she received such state aid in December 1973 and continues to meet the October 1972 state definition of disability.

**1973**

*Public Law 93-233,  
enacted December 31*

Only persons who had received APTD before July 1973 and were on the rolls in December 1973 may receive SSI on the basis of the state definition of disability; those who became eligible for state aid from July to December 1973 must meet the federal definition of disability.

**1980**

*Public Law 96-265,  
enacted June 9*

A disabled recipient who loses federal SSI eligibility because of earnings at the substantial gainful activity level may continue to receive a special benefit under section 1619 and retain eligibility for Medicaid under title XIX of the Social Security Act. This special benefit status may continue as long as the recipient has the disabling impairment and meets all nondisability SSI eligibility criteria. States have the option of supplementing this special benefit.

This provision of the law was in effect from January 1, 1981, through December 31, 1983. Beginning in January 1984, under a 1-year demonstration project, this provision was continued for persons already eligible for either regular SSI payments or special monthly benefits.

**1984**

*Public Law 98-460,  
enacted October 9*

The special benefit and Medicaid provisions of the 1980 legislation were extended through June 30, 1987 (retroactive to January 1, 1984).

**1986**

*Public Law 99-643,  
enacted November 10*

The special benefit and Medicaid provisions of the 1980 amendments are made permanent. The provisions were amended effective July 1, 1987, with significant modifications to simplify administration and to allow free movement between regular SSI disability payments and either the special cash benefit or Medicaid eligibility under section 1619. The distinction between a disabled person eligible for regular SSI payments and one eligible for 1619(a) is that the latter has several months with gross earnings above the SGA level. Previously, section 1619(a) status required completion of a trial work period and the determination that the work was SGA.

**1996**

*Public Law 104-193,  
enacted August 22*

For individuals under age 18, the "comparable severity" standard is eliminated and replaced with a requirement that a child be considered disabled if he/she has a medically determin-

able impairment that results in “marked and severe functional limitations,” and meets the existing statutory duration requirement. The law also eliminates references to “maladaptive behaviors” in the Listing of Impairments for children, and discontinues the use of individualized functional assessments for children.

SSI eligibility is prohibited for an individual in any month during which such an individual is a fugitive felon, fleeing prosecution, or violating state or federal conditions of probation or parole. In addition, SSI eligibility is prohibited for 10 years for those convicted of fraudulently claiming residence to obtain benefits simultaneously in two or more states.<sup>1</sup>

### Other Eligibility Provisions

#### Citizenship and Residence

**1972**

*Public Law 92-603,  
enacted October 30*

The individual must reside within one of the 50 states or the District of Columbia and be a citizen or an alien lawfully admitted for permanent residence or permanently residing in the United States under color of law. Persons living outside the United States for an entire calendar month lose their eligibility for such a month.

**1976**

*Public Law 94-241,  
enacted March 24*

Eligibility for SSI is extended to residents of the Northern Mariana Islands, effective January 9, 1978.

**1980**

*Public Law 96-265,  
enacted June 9*

The income and resources of the immigration sponsors of aliens applying for SSI are considered in determining eligibility for and the amount of payment. After allowances for the needs of the sponsor and his/her family, the remainder is deemed available for the support of the alien applicant for a 3-year period after admission to the United States for permanent residence. This provision does not apply to those who become blind or disabled after admission, to refugees, or to persons granted political asylum. (See “Deeming of Income and Resources” on page 30. for subsequent changes to sponsor-to-alien deeming provisions.)

**1989**

*Public Law 101-239,  
enacted December 19*

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

**1993**

*Public Law 103-66,  
enacted August 10*

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

**1996**

*Public Law 104-193,  
enacted August 22*

Prohibits SSI eligibility for anyone who is not a U.S. citizen or national unless they are in a “qualified alien” category and meet one of certain exceptions such as lawful permanent residents who earn or can be credited with 40 qualifying quarters of earnings, certain refugee type categories eligible for up to 5 years of time limited eligibility, or active duty U.S. military or veterans and their spouses and children. Extends eligibility for aliens receiving SSI as of August 22, 1996 (the enactment date of the law) for 1 year after the enactment date for those aliens found ineligible under the new standards.

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

*Public Law 104-208,  
enacted September 30*

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

**1997**

*Public Law 105-18,  
enacted June 12*

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

*Public Law 105-33,  
enacted August 5*

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

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

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

**1998**

*Public Law 105-306,  
enacted October 28*

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

**2000**

*Public Law 106-386,  
enacted October 28*

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

**Other Benefits**

**1980**

*Public Law 96-272,  
enacted June 17*

SSI applicants and recipients are not required as a condition of eligibility to elect to receive Veterans Administration pensions under the Veterans and Survivors’ Pension Improvement Act of 1978 if the state of residence lacks a medically needy program under title XIX.

**Drug Addiction and Alcoholism (DA&A)**

**1972**

*Public Law 92-603,  
enacted October 30*

Any disabled individual who has been medically determined to be an alcoholic or drug addict must accept appropriate treatment, if available, in an approved facility and demonstrate compliance with conditions and requirements for treatment.

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

**1994**

*Public Law 103-296,  
enacted August 15*

Any individual who is receiving SSI based on a disability where drug addiction or alcoholism is a contributing factor material to the finding of disability must comply with the DA&A treatment requirements. The individual must accept appropriate treatment when it is available and comply with the conditions and terms of treatment. Instances of noncompliance with the requirements result in progressively longer payment suspensions. Before payments can resume, the individual must demonstrate compliance for specific periods; 2 months, 3 months, and 6 months, respectively, for the first, second, third and subsequent instances of noncompliance. An individual who is not in compliance with the DA&A treatment requirements for 12 consecutive months shall not be eligible for payments; however, this does not prevent such individuals from reapplying and again becoming eligible for payments.

SSI disability payments based on DA&A are also limited to a total of 36 benefit months (beginning March 1995) regardless of whether appropriate treatment is available. Months for which benefits are not due and received do not count towards the 36-month limit.

Payments based on DA&A must be made to a representative payee. Preference is required to be given to community based nonprofit social service agencies and federal, state, or local government agencies in representative payee selection. These agencies when serving as payees for individuals receiving payments based on DA&A may retain the lesser of 10 percent of the monthly benefit or \$56 (indexed to the consumer price index (CPI)) as compensation for their services.

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

**1996**

*Public Law 104-121,  
enacted March 29*

An individual is not considered disabled if DA&A is a contributing factor material to a finding of disability.

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

**Institutionalization**

**1972**

*Public Law 92-603,  
enacted October 30*

An individual who is an inmate of a public institution is ineligible for SSI payments unless the institution is a facility approved for Medicaid payments and is receiving such payments on behalf of the person. Under *regulations*, the Medicaid payment must represent more than 50 percent of the cost of services provided by the facility to the individual.

**1976**

*Public Law 94-566,  
enacted October 20*

An inmate of a publicly operated community residence serving no more than 16 persons may, if otherwise eligible, receive SSI.

**1983**

*Public Law 98-21,  
enacted April 20*

Payments may be made to persons who are residents of public emergency shelters for the homeless for a period of up to 3 months in any 12-month period.

**1986**

*Public Law 99-643,  
enacted November 10*

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

**1987**

*Public Law 100-203,  
enacted December 22*

Effective January 1, 1988, payments may be made to persons who are residents of public emergency shelters for the homeless, for up to 6 months in a 9-month period.

Effective July 1, 1988, continued payment of SSI benefits for up to 3 months is permitted, at the rate that was applicable in the month prior to the first full month of institutionalization, for individuals whose expected institutional stay on admission is not likely to exceed 3 months, as certified by a physician, and for whom the receipt of benefits is necessary to maintain living arrangements to which they may return.

**1996**

*Public Law 104-193,  
enacted August 22*

Effective December 1996, institutionalized children under age 18 whose private health insurance is making payments to the institution may receive no more than \$30 per month in federal SSI.

**Vocational Rehabilitation and Treatment**

**1972**

*Public Law 92-603,  
enacted October 30*

Blind or disabled individuals receiving federal SSI benefits who are under age 65, must be referred to the state agency providing services under the Vocational Rehabilitation Act and must accept the services offered. States are reimbursed for the cost of services.

**1976**

*Public Law 94-566,  
enacted October 20*

Blind or disabled children under age 16 must be referred to the state agency administering crippled children's services or to another agency designated by the state. States are reimbursed for the cost of services.

Of funds provided for these services, at least 90 percent must be used for children under age 6 or for those who have never attended public schools.

**1980**

*Public Law 96-265,  
enacted June 9*

Disabled SSI recipients who medically recover while enrolled in approved vocational rehabilitation programs of state VR agencies, may continue to receive benefits during their participation in such programs if the Commissioner of Social Security determines that continuation in the program will increase the probability that they leave the rolls permanently.

**1981**

*Public Law 97-35,  
enacted August 13*

Funding no longer provided under title XVI for medical, social, developmental and rehabilitative services to disabled or blind children.

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

**1984**

*Public Law 98-460,  
enacted October 9*

Authorizes the reimbursement of states for the cost of VR services provided to individuals who (1) continue to receive benefits after medical recovery because they are participating in a state VR program or (2) refuse, without good cause, to continue in or cooperate with the VR program in which they had been participating.

**1987**

*Public Law 100-203,  
enacted December 22*

Provision for continuation of payments to SSI recipients who have medically recovered while enrolled in an approved vocational rehabilitation program extended to blind SSI recipients.

**1990**

*Public Law 101-508,  
enacted November 5*

Reimbursement authorized for the cost of vocational rehabilitation services provided in months in which the individual was not receiving federal SSI payments, if:

- SSI recipient status for Medicaid eligibility purposes was retained under work incentive provisions, or
- Benefits were in suspense<sup>2</sup> status (for a reason other than cessation of disability or blindness), or
- Federally administered state supplementation was received.

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

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

**1999**  
*Public Law 106-170,*  
*enacted December 17*

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

**Continuing Disability Reviews and Eligibility Redeterminations**

**1994**  
*Public Law 103-296,*  
*enacted August 15*

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

**1996**  
*Public Law 104-193,*  
*enacted August 22*

Repeals the requirement that SSA redetermine the eligibility of at least one-third of all childhood SSI recipients who reach age 18 after April 1995 during the 1-year period following attainment of age 18.

Requires a CDR:

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

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

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

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

**1997**  
*Public Law 105-33,*  
*enacted August 5*

Modifies provision of Public Law 104-193 to extend from 12 to 18 months the period for redetermining the disability of children under age 18 under the new childhood disability standard.

Modifies provision of Public Law 104-193 to permit SSA to schedule a CDR for a disabled child for whom low birth weight is a contributing factor material to the determination of disability, at a date after the child's first birthday if the Commissioner determines the impairment is not expected to improve within 12 months of the child's birth.

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

**1999**  
*Public Law 106-170,*  
*enacted December 17*

Prohibits the initiation of a CDR during the period that a recipient is using a "ticket" to work.

**Deeming of Income and Resources**

**1972**  
*Public Law 92-603,*  
*enacted October 30*

Deeming occurs when the income and resources of certain family members living in the same household with the SSI recipient are considered in determining the amount of the SSI



payment. These family members are the ineligible spouse of an adult recipient and the ineligible parents of a child recipient under age 21.

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

**1980**

*Public Law 96-265,  
enacted June 9*

Children aged 18 or older are not subject to parental deeming.

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

**1989**

*Public Law 101-239,  
enacted December 19*

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

**1993**

*Public Law 103-152,  
enacted November 24*

Sponsor-to-alien deeming period extended from 3 years to 5 years, effective January 1, 1994, through September 30, 1996.

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

**1996**

*Public Law 104-193,  
enacted August 22*

Deeming of income and resources from an immigration sponsor to a noncitizen continues until citizenship, with exceptions for those who earn, or can be credited with, 40 qualifying quarters of earnings. Effective for those whose sponsor signs a new legally enforceable affidavit of support.

*Public Law 104-208,  
enacted September 30*

Amends Public Law 104-193 to add two exceptions to the sponsor-to-alien deeming:

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

**1997**

*Public Law 105-33,  
enacted August 5*

Amends Public Law 104-208 to add an additional exception to sponsor-to-alien deeming when the parent of a noncitizen has been battered or subjected to extreme cruelty by family members.

**Federal Benefit Payments**

**Federal Benefit Rates**

Basic benefit standards are used in computing the amount of federal SSI payments. Benefit levels differ for individuals and couples living in households and for persons in Medicaid institutions. Individuals or couples living in their own households receive the full federal benefit. If an individual or couple is living in another person's household and receiving support and maintenance there, the federal benefit is reduced by one-third. The federal benefit rates for persons in households are increased annually to reflect increases in the cost of living. Legislation affecting the level of federal benefit rates since the inception of the SSI program are summarized in table 2.B1.

<b>1980</b> <i>Public Law 96-265, enacted June 9</i>	<b>Windfall Offset</b>  Offset (by reduction of retroactive Social Security benefits) to prevent persons whose initial OASDI payment is retroactive from receiving more in total benefits for the same period than if they were paid the benefits when regularly due.
<b>1984</b> <i>Public Law 98-617, enacted November 8</i>	Offset provision expanded to allow for reduction of retroactive SSI benefits and to apply in cases of OASDI benefit reinstatement.
<b>1982</b> <i>Public Law 97-248, enacted September 3</i>	<b>Proration of Benefit</b>  Benefit for first month of eligibility to be prorated by the number of days in the month for which an application has been filed and there is eligibility.
<b>1996</b> <i>Public Law 104-193, enacted August 22</i>	Changes the effective date of an SSI application to the first day of the month following the date on which the application was filed or on which the individual first becomes eligible, whichever is later. This, in effect, eliminates prorated payments in initial claims.
<b>1981</b> <i>Public Law 97-35, enacted August 13</i>	<b>Retrospective Monthly Accounting</b>  Changes the method of computing the SSI benefit to one under which the benefit amount is computed on a monthly basis and is based on income and other characteristics in the previous (or second previous) month.
<b>1984</b> <i>Public Law 98-369, enacted July 18</i>	Changes the method of computing the SSI benefit to persons receiving title II payments. The effect of the increased title II income at the time of the cost-of-living increase is not delayed as it otherwise would be.
<b>1987</b> <i>Public Law 100-203, enacted December 22</i>	Provides an exception to retrospective monthly accounting so that amounts received under Aid to Families With Dependent Children (AFDC), foster care, refugee cash assistance, Cuban-Haitian entrant assistance, or general and child welfare assistance provided by the Bureau of Indian Affairs are counted only in the month received.
<b>1993</b> <i>Public Law 103-66, enacted August 10</i>	Changes the method of computing the SSI benefit to persons receiving the value of the one-third reduction. The effect of the increased value at the time of the cost-of-living increase is not delayed as it otherwise would be. Effective January 1995.
<b>1981</b> <i>Public Law 97-35, enacted August 13</i>	<b>Uncashed Checks</b>  States that have federally administered supplements to be credited their share of SSI checks that remain unnegotiated for 180 days.
<b>1987</b> <i>Public Law 100-86, enacted August 10</i>	SSI checks now unnegotiable after 1 year. States are credited their share of SSI checks after 1 year rather than 180 days.
<b>1982</b> <i>Public Law 97-248, enacted September 3</i>	<b>Rounding of Payment Amounts</b>  Cost-of-living adjustments in the federal SSI benefit and income eligibility levels are to be rounded to the next lower whole dollar, after the adjustment is calculated. Subsequent cost-of-living adjustments will be calculated on the previous year's benefit standard before rounding.

**Penalties Resulting in Nonpayment of Benefits**

**1999**

*Public Law 106-169,  
enacted December 14*

Provides a penalty under the SSI program for the disposal of resources at less than fair market value. The penalty is a loss of benefits for up to 36 months. A formula is provided to determine the number of months.

Provides for the nonpayment of OASDI and SSI benefits (6, 12 and 24 months, respectively, for the first, second, and third or subsequent violations) for individuals found to have made a statement or representation of material fact for use in determining eligibility for benefits that the individual knew, or should have known, was false or misleading or omitted a material fact.

**Exclusions from Income**

**General Exclusions**

**1972**

*Public Law 92-603,  
enacted October 30*

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

**1981**

*Public Law 97-35,  
enacted August 13*

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

**2000**

*Public Law 106-554,  
enacted December 21*

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

**Special Exclusions**

**1972**

*Public Law 92-603,  
enacted October 30*

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

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

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

Work expenses of blind persons.

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

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

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

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

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

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

## SSI: History of Provisions

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<b>1976</b> <i>Public Law 94-331, enacted June 30</i>	Disaster assistance from income for 9 months and application of one-third reduction for 6 months for certain victims of disasters.
<i>Public Law 94-566, enacted October 20</i>	Any assistance based on need (including vendor payments) made to or on behalf of SSI recipients, which is paid and wholly funded by state or local governments.  The value of assistance provided under certain federal housing programs.
<b>1977</b> <i>Public Law 95-113, enacted September 29</i>	Food stamps, federally donated food, and the value of free or reduced price food for women and children under the Child Nutrition Act and National School Lunch Act.
<i>Public Law 95-171, enacted November 12</i>	Provisions for exclusions for support and maintenance under the Disaster Relief and Emergency Assistance Act of 1974 extended on a permanent basis. Effective January 1, 1978.
<b>1980</b> <i>Public Law 96-222, enacted April 1</i>	Earned income tax credit treated as earned income (temporarily excluded from 1975 through 1980).
<i>Public Law 96-265, enacted June 9</i>	Remunerations received in sheltered workshops and work activity centers are considered earned income and qualify for earned income exclusions.  Impairment-related work expenses paid by the individual (including cost for attendant care, medical equipment, drugs, and services necessary to control an impairment) are deducted from earnings when determining if an individual is engaging in substantial gainful activity. Impairment-related work expenses are excluded in calculating income for benefit purposes if initial eligibility for benefits exists on the basis of countable income without applying this exclusion.
<b>1981</b> <i>Public Law 97-35, enacted August 13</i>	Modifies provision under which irregularly or infrequently received income is excluded to conform to change from quarterly to monthly accounting; amounts excludable: \$20 or less of unearned income and \$10 of earned income in a month.
<b>1982</b> <i>Public Law 97-377, enacted December 21</i>	From December 18, 1982, to September 30, 1983, certain home energy assistance payments are excluded if a state agency certified that they are based on need.
<b>1983</b> <i>Public Law 97-424, enacted January 6</i>	Support or maintenance assistance (including home energy assistance) provided in kind by a nonprofit organization or in cash or in kind by certain providers of home energy is excluded if the state determines that the assistance is based on need. Provision is applicable through September 1984.  Certain home energy assistance payments are excluded if a state agency certified that the assistance is based on need. Provision is applicable through June 1985.
<b>1984</b> <i>Public Law 98-369, enacted July 18</i>	The 1983 provisions for support and maintenance and home energy assistance continue to October 1, 1987.
<b>1986</b> <i>Public Law 99-498, enacted October 17</i>	Educational assistance used for educational expenses under the Higher Education Act of 1965 as amended.
<b>1987</b> <i>Public Law 100-203, enacted December 22</i>	The 1983 provisions for support and maintenance and home energy assistance made permanent.

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

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

**1988**

*Public Law 100-383,  
enacted August 10*

Restitution payments made to Japanese internees and relocated Aleutians.

**1989**

*Public Law 101-239,  
enacted December 19*

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

Payments from the Agent Orange Settlement.

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

**1990**

*Public Law 101-508,  
enacted November 5*

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

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

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

Payments received as state or local government relocation assistance.

Payments received under the Radiation Exposure Compensation Act.

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

**1993**

*Public Law 103-66,  
enacted August 10*

Hostile fire pay to members of the uniformed services.

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

**1994**

*Public Law 103-286,  
enacted August 1*

Payments to victims of Nazi persecution.

**1998**

*Public Law 105-285,  
enacted October 27*

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

*Public Law 105-306,  
enacted October 28*

In-kind gifts to children with life-threatening conditions by tax-exempt organizations not converted to cash.

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

*Public Law 105-369,  
enacted November 12*

Payments made under the Ricky Ray Hemophilia Relief Fund Act of 1998.

**2000**

*Public Law 106-554,  
enacted December 21*

Interest on funds deposited in an Individual Development Account.

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

### Limits and Exclusions from Resources

- 1972**  
*Public Law 92-603,*  
*enacted October 30*
- Countable resources limited to \$1,500 or less for an individual and to \$2,250 or less for a couple.
- 1984**  
*Public Law 98-369,*  
*enacted July 18*
- Limit on countable resources raised by \$100 a year for individuals and \$150 a year for couples, beginning in calendar year 1985 through 1989. The respective limits would become \$2,000 for an individual and \$3,000 for a couple in 1989 and thereafter.
- 1999**  
*Public Law 106-169,*  
*enacted December 14*
- Includes generally in the countable resources of an individual the assets of a trust which could be used for the benefit of the individual or spouse.
- General Exclusions**
- 1972**  
*Public Law 92-603,*  
*enacted October 30*
- A home of reasonable value—established by *regulation* as not exceeding a fair-market value of \$25,000 (\$35,000 in Alaska and Hawaii).
- Personal effects and household goods of reasonable value established by *regulation* as not exceeding a total market value of \$1,500.
- An automobile of reasonable value—established by *regulation* as not exceeding a market value of \$1,200.
- An automobile may be excluded, regardless of value, if the individual's household uses it for employment or medical treatment, or if it is modified to be operated by or for transportation of a handicapped person.
- Life insurance with face value of \$1,500 or less.
- 1976**  
*Public Law 94-569,*  
*enacted October 20*
- The recipient's home, regardless of value, is excluded from consideration in determining resources.
- 1977**  
*Public Law 95-171,*  
*enacted November 12*
- Assistance received under the Disaster Relief and Emergency Assistance Act of 1974 for 9 months following receipt.
- 1979**
- Reasonable value for an automobile increased by *regulation* to \$4,500 of current-market value; personal goods and household effects increased to \$2,000 of equity value.
- 1980**  
*Public Law 96-611,*  
*enacted December 28*
- Assets transferred for less than fair market value for the purpose of establishing eligibility for benefits under the Social Security Act are counted as resources for 24 months after transfer.
- 1982**  
*Public Law 97-248,*  
*enacted September 3*
- The value, within prescribed limits, of a burial space for the recipient, spouse, and immediate family is excluded. In addition, \$1,500 each (less the value of already excluded life insurance and any amount in an irrevocable burial arrangement) may be set aside for the burial of the recipient and spouse, if held in separately identifiable burial funds and if inclusion of any of the burial funds in countable resources would cause the resource limit to be exceeded.
- 1984**  
*Public Law 98-369,*  
*enacted July 18*
- The unspent portion of any retroactive title II or title XVI payment is excluded for 6 months following its receipt, and the individual must be given written notice of the time limit on the exclusion.

- 1985** *Regulations* permit exclusion, regardless of value, of an automobile needed for essential transportation or modified for a handicapped person. The \$4,500 current market value limit applies only if no automobile could be excluded based on the nature of its use.
- 1987**  
*Public Law 100-203, enacted December 22* Provides for suspension of the 1980 transfer of assets provision, in any month that it is determined that undue hardship would result.  
 Real property that cannot be sold because it is jointly owned; its sale would cause the other owner(s) undue hardship due to loss of housing; its sale is barred by a legal impediment; or, the owner's reasonable efforts to sell have been unsuccessful.  
 Temporarily extends the 1984 exclusion of retroactive title II and title XVI benefits from 6 months to 9 months (the longer exclusion applies to benefits paid in fiscal years 1988 and 1989).  
 Allows the exclusion of burial funds, as described above, regardless of whether or not counting any portion of those funds would result in excess resources.
- 1988**  
*Public Law 100-360, enacted July 1* Removes the transfer-of-assets penalty for transfers made July 1, 1988, or later.  
*Public Law 100-707, enacted November 23* Removes the time limit for exclusion of disaster assistance.
- Special Exclusions**
- 1972**  
*Public Law 92-603, enacted October 30* Assets of a blind or disabled individual that are necessary to an approved plan of self-support.  
 Tools and other property essential to self-support (PESS), within reasonable limits. Shares of nonnegotiable stock in regional or village corporations held by natives of Alaska.  
 For persons transferred from state programs to SSI, resource exclusions equal to the maximum amount permitted as of October 1972 under the state program.
- 1988**  
*Public Law 100-383, enacted August 10* Restitution payments made to Japanese internees and relocated Aleutians.
- 1989**  
*Public Law 101-239, enacted December 19* Specifies that no limitation can be placed on property essential to self-support used in a trade or business, or by an individual as an employee (including the tools of a tradesperson and the machinery and livestock of a farmer).  
 Payments from the Agent Orange Settlement.
- 1990**  
*Public Law 101-508, enacted November 5* Earned income tax credit excluded for the month following the month the credit is received.  
 Payments received from a state-administered fund established to aid victims of crime excluded for a 9-month period. Individual not required to file for such benefits.  
 Payments received as state or local government relocation assistance excluded for a 9-month period. (The provision expired 3 years after its effective date.)  
 Payments received under the Radiation Exposure Compensation Act.

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

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

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

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

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

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

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

**2000**  
*Public Law 106-554,*  
*enacted December 21* Funds deposited by an individual in an Individual Development Account and the interest on those funds.

### **Presumptive and Emergency Payments and Interim Assistance Reimbursement**

#### **Presumptive Payments**

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

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

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

#### **Emergency Advance Payments**

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

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



**1996**

*Public Law 104-193,  
enacted August 22*

Applicants who have a financial emergency may receive an emergency advance payment in the month of application, which, effective with this law, is always prior to the first month of eligibility. These advance payments are recouped by proportional reductions in the recipient's first 6 months of SSI benefits.

**Interim Assistance Reimbursement**

**1974**

*Public Law 93-368,  
enacted August 7*

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

**1976**

*Public Law 94-365,  
enacted July 14*

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

**1987**

*Public Law 100-203,  
enacted December 22*

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

**Medicaid Eligibility**

**1972**

*Public Law 92-603,  
enacted October 30*

States can provide Medicaid coverage to all recipients of SSI payments. Alternatively, they can limit coverage by applying more restrictive criteria from the state Medicaid plan in effect on January 1, 1972.

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

**1976**

*Public Law 94-566,  
enacted October 20*

Preserves the Medicaid eligibility of recipients who become ineligible for cash SSI payments due to the cost-of-living increases in Social Security benefits.

**1980**

*Public Law 96-265,  
enacted June 9*

Blind or disabled recipients under age 65 no longer eligible for either regular or special SSI payments because of their earnings may retain SSI recipient status for Medicaid eligibility purposes under the following conditions: (1) they continue to have the disabling impairment, (2) they meet all nondisability eligibility criteria except for earned income, (3) they would be seriously inhibited from continuing employment without Medicaid services, and (4) their earnings are insufficient to provide a reasonable equivalent of SSI payments and Medicaid.

In states that do not provide Medicaid coverage categorically to all SSI recipients, qualification for Medicaid benefits depends on the state's specific eligibility and program requirements.

The Medicaid provision of the 1980 legislation was in effect from January 1, 1981, through December 31, 1983. Under a 1-year demonstration project, beginning January 1, 1984, this provision was continued for persons already eligible for regular or special SSI payments or for retention of Medicaid eligibility.

**1984**

*Public Law 98-460,  
enacted October 9*

Medicaid provision of 1980 legislation extended through June 30, 1987 (retroactive to January 1, 1984).

### 1986

*Public Law 99-272,  
enacted April 7*

Restores Medicaid eligibility for some disabled widow(er)s who became ineligible for SSI when their title II benefits increased in 1984 because of a change in the Social Security disabled widow(er)s benefits reduction factor.

*Public Law 99-643,  
enacted November 10*

The SSI recipient status for Medicaid eligibility provision of the 1980 amendments is made permanent.

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

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

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

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

### 1987

*Public Law 100-203,  
enacted December 22*

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

### 1990

*Public Law 101-508,  
enacted November 5*

Age limit for retention of SSI recipient status for Medicaid eligibility purposes is (1980 and subsequent work incentive provisions, above) eliminated.

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

### 1997

*Public Law 105-33,  
enacted August 5*

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

## State Supplementation

### 1972

*Public Law 92-603,  
enacted October 30*

States are given the option of providing supplementary payments both to recipients transferred from the state program and to those newly eligible for SSI.

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

“Hold harmless” protection, which limits a state’s fiscal liability to its share of OAA, AB, and APTD expenditures for calendar year 1972, is provided to states electing federal administration of their supplementary plans. This provision applies only to supplementary payments that do not, on the average, exceed a state’s “adjusted payment level.” (The adjusted pay-

ment level is the average of the payments that individuals with no other income received in January 1972; it may include the bonus value of food stamps. Adjustments are provided for payments that had been below state standards.)

**1973**

*Public Law 93-66,  
enacted July 9*

Provision is made for mandatory state supplementation as assurance against reduction of income for persons who received state assistance in December 1973 and were transferred to SSI. These supplementary payments must equal the difference between (1) the amount of the state assistance payment that the individual received in December 1973 plus other income and (2) his/her federal SSI payment plus other income.

**1976**

*Public Law 94-585,  
enacted October 21*

After June 30, 1977, when the federal SSI payment level is increased by a cost-of-living increase, such an increase will be excluded in calculating the "hold harmless" amount.

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

**1982**

*Public Law 97-248,  
enacted September 3*

Begins a 3-year phase out of "hold harmless" protection. Effective with fiscal year 1985, Wisconsin and Hawaii (the only remaining "hold harmless" states) assumed the full cost of their supplementary payments.

**1983**

*Public Law 98-21,  
enacted April 20*

Federal pass-through law is adjusted (1) by substituting the state supplementary payment levels in effect in March 1983 for those in effect in December 1976 as the levels that states must maintain in complying with the pass-through requirements, and (2) with regard to the \$20 (individual) and \$30 (couple) increase in the federal SSI standard in July 1983, by requiring states to pass through only as much as would have been required if the SSI cost-of-living adjustment had been made in July 1983.

**1987**

*Public Law 100-203,  
enacted December 22*

Provides for federal administration of state supplements to residents of medical institutions.

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

**1993**

*Public Law 103-66,  
enacted August 10*

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

**1997**

*Public Law 105-33,  
enacted August 5*

Revises the schedule of per-payment fees for federal administration of state supplementation for fiscal years 1998 (\$6.20) through 2002 (\$8.50) and provides a formula for determining the fee beyond fiscal year 2002. The scheduled fees for fiscal years 1999, 2000, and 2001 are \$7.60; \$7.80; and \$8.10, respectively.

**1999**

*Public Law 106-170,  
enacted December 17*

A state which has an agreement with SSA to administer its supplementation payments, must remit both payments and fees prior to the SSI payment date.

**2000**

*Public Law 106-554,  
enacted December 21*

Changes the effective date of above provision from 2009 to 2001.

**Overpayment Recovery**

**1984**

*Public Law 98-369,  
enacted July 18*

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

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

Provides for the recovery of overpayments from tax refunds.

**1988**

*Public Law 100-485,  
enacted October 13*

Extends the authority to recover overpayments from tax refunds.

**1998**

*Public Law 105-306,  
enacted October 28*

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

**1999**

*Public Law 106-169,  
enacted December 14*

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

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

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

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## Medicare

*The following summary of the Medicare program is intended for informational purposes only. It is not an official statement of policy that can be relied upon in lieu of the appropriate law, regulations, and rulings. This narrative is not intended to render legal or other professional advice; therefore, it should not be relied upon for making specific legal decisions. Instead, the law, regulations, and rulings should be consulted for purposes of making such decisions.*

### Overview

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

When first implemented in 1966, Medicare covered most persons aged 65 or older. In 1973, the following groups also became eligible for benefits: persons entitled to Social Security or Railroad Retirement disability cash benefits for at least 24 months, most persons with end stage renal disease (ESRD), and certain otherwise noncovered aged persons who elect to pay a premium for Medicare coverage. The Medicare, Medicaid, and SCHIP Benefits Improvement and Protection Act of 2000 (Public Law 106-554) allows persons with amyotrophic lateral sclerosis (Lou Gehrig's disease) to waive the 24-month waiting period.

Medicare has traditionally consisted of two parts: Hospital Insurance (HI), also known as Part A, and Supplementary Medical Insurance (SMI), also known as Part B. A new, third part of Medicare, sometimes known as Part C, is the Medicare+Choice program, which was established by the Balanced Budget Act (BBA) of 1997 (Public Law 105-33) and which expanded beneficiaries' options for participation in private-sector health care plans. When Medicare began on July 1, 1966, approximately 19 million people enrolled. In 2001, about 40 million people are enrolled in one or both of Parts A and B of the Medicare program, and 5.7 million of them have chosen to participate in a Medicare+Choice plan.

### Coverage

HI is generally provided automatically, and free of premiums, to persons aged 65 or older who are eligible for Social Security or Railroad Retirement benefits, whether they have claimed these monthly cash benefits or not. Also, workers and their spouses with a sufficient period of Medicare-only coverage in federal, state, or local government employment are eligible beginning at age 65. Similarly, individuals who have been entitled to Social Security or Rail-

road Retirement disability benefits for at least 24 months, and government employees with Medicare-only coverage who have been disabled for more than 29 months, are entitled to HI benefits. HI coverage is also provided to insured workers with ESRD (and to insured workers' spouses and children with ESRD), as well as to some otherwise ineligible aged and disabled beneficiaries who voluntarily pay a monthly premium for their coverage. In 2000, the HI program provided protection against the costs of hospital and specific other medical care to about 39 million people (34 million aged and 5 million disabled enrollees). HI benefit payments totaled \$128 billion in 2000.

The following health care services are covered under the HI program:

- Inpatient hospital care coverage includes costs of a semi-private room, meals, regular nursing services, operating and recovery rooms, intensive care, inpatient prescription drugs, laboratory tests, X-rays, psychiatric hospitals, inpatient rehabilitation, and long-term care (LTC) hospitalization when medically necessary, as well as all other medically necessary services and supplies provided in the hospital. An initial deductible payment is required of beneficiaries who are admitted to a hospital, plus copayments for all hospital days following day 60 within a benefit period (described later).
- Skilled nursing facility (SNF) care is covered by HI only if it follows within 30 days (generally) of a hospitalization of 3 days or more and is certified as medically necessary. Covered services are similar to those for inpatient hospital care but also include rehabilitation services and appliances. The number of SNF days provided under Medicare is limited to 100 days per benefit period (described later), with a copayment required for days 21–100. HI does not cover nursing facility care if the patient does not require skilled nursing or skilled rehabilitation services.
- Home health agency (HHA) care is covered by both HI and SMI. The BBA transferred from HI to SMI those home health services furnished on or after January 1, 1998 that are unassociated with a hospital or skilled nursing facility stay. HI will continue to cover the first 100 visits following a 3-day hospital stay or a skilled nursing facility stay; SMI covers any visits thereafter. Home health care under HI and SMI has no copayment and no deductible.

HHA care, including care provided by a home health aide, may be furnished part-time by a HHA in the residence of a home-bound beneficiary if intermittent or part-time skilled nursing and/or certain other therapy or rehabilitation care is necessary. Certain medical supplies and durable

## Medicare

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medical equipment (DME) may also be provided, though beneficiaries must pay a 20-percent coinsurance for DME, as required under SMI. There must be a plan of treatment and periodical review by a physician. Full-time nursing care, food, blood, and drugs are not provided as HHA services.

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

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

All citizens (and certain legal aliens) aged 65 or older, and all disabled persons entitled to coverage under HI, are eligible to enroll in the SMI program on a voluntary basis by payment of a monthly premium. Almost all persons entitled to HI choose to enroll in SMI. In 2000, the SMI program provided protection against the costs of physician and other medical services to about 37 million people (32 million aged and 5 million disabled). SMI benefits totaled \$88.9 billion in 2000.

The SMI program covers the following services and supplies:

- Physicians' and surgeons' services, including some covered services furnished by chiropractors, podiatrists, dentists, and optometrists. Also covered are the services provided by these Medicare-approved practitioners who are not physicians: certified registered nurse anesthetists, clinical psychologists, clinical social workers (other than in a hospital or skilled nursing facility), physician assistants, and nurse practitioners and clinical nurse specialists in collabo-

ration with a physician.

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

To be covered, all services must be either medically necessary or one of several prescribed preventive benefits. SMI services are generally subject to a deductible and coinsurance (see next section). Certain medical services and related care are subject to special payment rules, including deductibles (for blood), maximum approved amounts (for Medicare-approved physical, speech, or occupational therapy services performed after 2002 in settings other than hospitals), and higher cost-sharing requirements (such as those for outpatient treatments for mental illness).

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

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

tions that seek to contract as Medicare+Choice plans must meet specific organizational, financial, and other requirements. Following are the primary Medicare+Choice plans:

- Coordinated care plans, which include health maintenance organizations (HMOs), provider-sponsored organizations (PSOs), preferred provider organizations (PPOs), and other certified coordinated care plans and entities that meet the standards set forth in the law.
- Private, unrestricted FFS plans, which allow beneficiaries to select certain private providers. For those providers who agree to accept the plan's payment terms and conditions, this option does not place the providers at risk, nor does it vary payment rates based on utilization.
- Medical savings account (MSA) plans, which provide benefits after a single high deductible is met. Medicare makes an annual deposit to the MSA, and the beneficiary is expected to use the money in the MSA to pay for medical expenses below the annual deductible. MSAs are currently a test program for a limited number of eligible Medicare beneficiaries.

Except for MSA plans, all Medicare+Choice plans are required to provide at least the current Medicare benefit package, excluding hospice services. Plans may offer additional covered services and are required to do so (or return excess payments) if plan costs are lower than the Medicare payments received by the plan. There are some restrictions as to who may elect an MSA plan, even when enrollment is no longer limited to a certain number of participants.

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

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

#### **Program Financing**

The HI program is financed primarily through a mandatory payroll tax. Almost all employees and self-employed workers in the United States work in employment covered by the HI program and pay taxes to support the cost of benefits for aged and disabled beneficiaries. The HI tax rate is 1.45 percent of earnings, to be paid by each employee and a matching amount by the employer for each employee,

and 2.90 percent for self-employed persons. Beginning in 1994, this tax is paid on all covered wages and self-employment income without limit. (Prior to 1994, the tax applied only up to a specified maximum amount of earnings.) The HI tax rate is specified in the Social Security Act and cannot be changed without legislation.

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

The SMI program is financed through premium payments (\$50 per beneficiary per month in 2001) and contributions from the general fund of the U.S. Treasury. Beneficiary premiums are generally set at a level that covers 25 percent of the average expenditures for aged beneficiaries. Therefore, the contributions from the general fund of the U.S. Treasury are the largest source of SMI income. The SMI trust fund also receives income from interest earnings on its invested assets, as well as a small amount of miscellaneous income. Beneficiary premiums and general fund payments are redetermined annually, to match estimated program costs for the following year.

Capitation payments to Medicare+Choice plans are financed from the HI and SMI trust funds in proportion to the relative weights of HI and SMI benefits to the total benefits paid by the Medicare program.

#### **Beneficiary Payment Liabilities**

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

For beneficiaries enrolled in Medicare+Choice plans, the beneficiary's payment share is based on the cost-sharing structure of the specific plan selected by the beneficiary, since each plan has its own requirements. Most plans

## Medicare

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have lower deductibles and coinsurance than are required of fee-for-service beneficiaries. Such beneficiaries pay the monthly Part B premium and may, depending on the plan, pay an additional plan premium.

For hospital care covered under HI, a fee-for-service beneficiary's payment share includes a one-time deductible amount at the beginning of each benefit period (\$792 in 2001). This deductible covers the beneficiary's part of the first 60 days of each spell of inpatient hospital care. If continued inpatient care is needed beyond the 60 days, additional coinsurance payments (\$198 per day in 2001) are required through the 90th day of a benefit period. Each HI beneficiary also has a "lifetime reserve" of 60 additional hospital days that may be used when the covered days within a benefit period have been exhausted. Lifetime reserve days may be used only once, and coinsurance payments (\$396 per day in 2001) are required.

For skilled nursing care covered under HI, Medicare fully covers the first 20 days of SNF care in a benefit period. But for days 21–100, a copayment (\$99 per day in 2001) is required from the beneficiary. After 100 days of SNF care per benefit period, Medicare pays nothing for SNF care. Home health care has no deductible or coinsurance payment by the beneficiary. In any HI service, the beneficiary is responsible for fees to cover the first 3 pints or units of nonreplaced blood per calendar year. The beneficiary has the option of paying the fee or of having the blood replaced.

There are no premiums for most people covered by the HI program. Eligibility is generally earned through the work experience of the beneficiary or of his or her spouse. However, most aged people who are otherwise ineligible for premium-free HI coverage can enroll voluntarily by paying a monthly premium, if they also enroll in SMI. For people with fewer than 30 quarters of coverage as defined by the Social Security Administration (SSA), the 2001 HI monthly premium rate is \$300; for those with 30 to 39 quarters of coverage, the rate is reduced to \$165. Voluntary coverage upon payment of the HI premium, with or without enrolling in SMI, is also available to disabled individuals for whom cash benefits have ceased due to earnings in excess of those allowed for receiving cash benefits.

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

### Provider Payments

For HI, before 1983, payments to providers were made on a reasonable cost basis. Medicare payments for most

inpatient hospital services are now made under a reimbursement mechanism known as the prospective payment system (PPS). Under PPS, a specific predetermined amount is paid for each inpatient hospital stay, based on each stay's diagnosis-related group (DRG) classification. In some cases the payment the hospital receives is less than the hospital's actual cost for providing the HI-covered inpatient hospital services for the stay; in other cases it is more. The hospital absorbs the loss or makes a profit. Certain payment adjustments exist for extraordinarily costly inpatient hospital stays. Payments for skilled nursing care and home health care are made under separate prospective payment systems. Payments for inpatient rehabilitation and psychiatric care are currently reimbursed on a reasonable cost basis, but prospective payment systems are expected to be implemented in the near future, as required by the BBA.

For SMI, before 1992, physicians were paid on the basis of reasonable charge. This amount was initially defined as the lowest of (1) the physician's actual charge; (2) the physician's customary charge; or (3) the prevailing charge for similar services in that locality. Beginning January 1992, allowed charges were defined as the lesser of (1) the submitted charges, or (2) the amount determined by a fee schedule based on a relative value scale (RVS). Payments for DME and clinical laboratory services are also based on a fee schedule. Most hospital outpatient services are reimbursed on a prospective payment system, and home health care is reimbursed under the same prospective payment system as HI.

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

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



## Claims Processing

Medicare's HI and SMI fee-for-service claims are processed by nongovernment organizations or agencies that contract to serve as the fiscal agent between providers and the federal government. These claims processors are known as intermediaries and carriers. They apply the Medicare coverage rules to determine the appropriateness of claims.

Medicare intermediaries process HI claims for institutional services, including inpatient hospital claims, SNFs, HHAs, and hospice services. They also process outpatient hospital claims for SMI. Examples of intermediaries are BC/BS (which utilize their plans in various states) and other commercial insurance companies. Intermediaries' responsibilities include the following:

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

Medicare carriers handle SMI claims for services by physicians and medical suppliers. Examples of carriers are the BS plans in a state, and various commercial insurance companies. Carriers' responsibilities include the following:

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

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

as new authorities to contract with entities to perform specific payment safeguard functions.

## Administration

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

A Board of Trustees, composed of two appointed members of the public and four members who serve by virtue of their positions in the federal government, oversees the financial operations of the HI and SMI trust funds. The Secretary of the Treasury is the managing trustee. The Board of Trustees reports to Congress on the financial and actuarial status of the Medicare trust funds on or about the first day of April each year.

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

## Data Summary

The Medicare program covers 95 percent of our nation's aged population, as well as many people who are on Social Security because of disability. In 2000, HI covered about 39 million enrollees with benefit payments of \$128.5 billion, and SMI covered 37 million enrollees with benefit payments of \$88.9 billion. Administrative costs were about 2 percent of HI and about 2 percent of SMI disbursements for 2000. Total disbursements for Medicare in 2000 were \$222 billion.

*Note: Medicare enrollment data are based on estimates prepared for the 2001 annual report of the Medicare Board of Trustees to Congress (available on the Internet at [www.hcfa.gov/pubforms/tr/](http://www.hcfa.gov/pubforms/tr/)). Medicare benefits, administrative costs, and total disbursements for 2000 are actual amounts for the calendar year, as reported by the Department of the Treasury.*

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## Medicare: History of Provisions

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

Act \*

### Insured Status

#### Entitlement to Hospital Insurance Benefits

- 1965** Individual aged 65 or older entitled to monthly benefits under the Social Security or Railroad Retirement program, or aged 65 before 1968, or 3 quarters of coverage (QC) after 1965 and before attainment of age 65.
- 1967** 3 QC for each year after 1966 and before attainment of age 65.
- 1972** Disabled individual, under age 65, entitled to disability benefits for 24 consecutive months under the Social Security or Railroad Retirement program (excludes spouses and children of disabled individuals). Individual under age 65 who has end stage renal disease (ESRD) and who is either fully or currently insured, or is entitled to monthly benefits under the Social Security or Railroad Retirement program or is the spouse or dependent child of such an insured individual or beneficiary. Entitlement begins on the first day of the third month following the initiation of a course of renal dialysis and ends with the 12th month following the month in which either the dialysis terminates or the individual has a renal transplant.
- Individual aged 65 or older enrolled in the SMI program who is not otherwise entitled to HI benefits, upon voluntary participation with payment of Hospital Insurance premium.
- 1980** Individual who would be entitled to monthly benefits under the Social Security or Railroad Retirement program if application were made.
- Disabled individual under age 65 entitled to disability benefits for at least 24 months, not necessarily consecutive, under the Social Security or Railroad Retirement program.
- Medicare coverage extended for up to 36 months for disabled individuals whose disability continues, but whose monthly benefit ceased because they engaged in substantial gainful activity.
- Second waiting period eliminated if a former disabled-worker beneficiary becomes entitled again within 5 years (7 years for disabled widows and widowers and disabled children aged 18 or older).
- 1982** Federal employees covered under HI based on QC for earnings as federal employees and/or based on deemed QC for earnings as federal employees before 1983.
- 1983** Employees of nonprofit organizations, effective Jan. 1, 1984.
- 1986** Mandatory coverage for state and local government employees not covered under Social Security and hired after Mar. 31, 1986.
- 1987** Second waiting period eliminated if a former disabled beneficiary becomes entitled again (no time limit).
- 1989** Disabled individuals under age 65 who are no longer entitled to Social Security disability benefits because their earnings exceeded the substantial gainful activity level have the option to purchase Medicare coverage by paying the HI and SMI premiums.
- 2000** The 24-month waiting period (otherwise required for an individual to establish Medicare eligibility on the basis of a disability) is waived for persons with amyotrophic lateral sclerosis, effective July 1, 2001.

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

**Entitlement to Supplementary Medical Insurance Benefits**

- 1965** U.S. resident (citizen or lawfully admitted alien with 5 years continuous residence) aged 65 or older or any individual entitled to HI benefits, upon voluntary participation with payment of SMI premium.
- 1972** Individual under age 65 entitled to HI benefits, upon voluntary participation with payment of SMI premium.

**Medicare Benefits**

**HI and SMI**

- 1965** Requires that Medicare be secondary payer to benefits provided by liability insurance policies or under no-fault insurance.
- 1981** Requires that Medicare be secondary payer to employer-based group health plans for beneficiaries entitled to Medicare solely due to end-stage renal disease (ESRD) for up to 12 months.
- 1982** For workers and their spouses aged 65-69, Medicare is the secondary payer when benefits are provided under an employer-based group health plan (applicable to employers with 20 or more employees who sponsor or contribute to the group plan).  
Health maintenance organizations (HMOs) will be authorized as providers of benefits. The Secretary of HHS must certify the prospective payment mechanism for HMOs before implementation.
- 1984** Medicare secondary payer provisions are extended to spouses aged 65-69 of workers under age 65 whose employer-based group health plan covers such spouses.  
For HMOs, includes medical and other health services furnished by clinical psychologists.
- 1985** Provides payment for liver transplant services.
- 1986** Extends the working age secondary payer provision to cover workers and their spouses beyond age 69.  
For HMOs that offered organ transplants as a basic health service on Apr. 15, 1985, such services may be offered from Oct. 1, 1985, through Apr. 1, 1988.  
For disabled individuals who are covered by employer-based health plans (with at least 100 employees), Medicare is the secondary payer, effective for 1987-91.
- 1987** Requires HMOs/competitive medical plans that cease to contract with Medicare to provide or arrange supplemental coverage of benefits related to preexisting conditions for the lesser of 6 months or the duration of an exclusion period.  
Specifies in law that in order to be eligible for home health care, a Medicare beneficiary must have a restricted ability to leave the home, requiring the assistance of another or the aid of a supportive device (such as crutches, a cane, a wheelchair, or a walker).  
Clarifies that the secondary payer provision for disabled individuals covered under employer-based health plans for employers with at least 500 employees applies to employers who are government entities.
- 1990** Requires that Medicare be the secondary payer to employer-based group health plans for beneficiaries entitled to Medicare solely due to ESRD for up to 18 months (extended from 12 months), effective Feb. 1, 1991, to Jan. 1, 1996.  
The secondary payer provision for disabled beneficiaries covered under large employer plans (see 1986.); effective through Sept. 30, 1995.
- 1993** The secondary payer provision for disabled beneficiaries covered under large employer plans is effective through Sept. 30, 1998.

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

**1997** Established an expanded set of options for the delivery of health care under Medicare, referred to as Medicare+Choice. All Medicare beneficiaries can receive their Medicare benefits through the original fee-for-service program. In addition, most beneficiaries can choose instead to receive their Medicare benefits through one of the following Medicare+Choice plans: (1) coordinated care plans (such as HMOs, provider-sponsored organizations, and preferred provider organizations); (2) Medical Savings Account (MSA)/High Deductible plans (through a demonstration available for up to 390,000 beneficiaries); or (3) private fee-for-service plans. Except for MSA plans, all Medicare+Choice plans are required to provide the current Medicare benefit package (excluding hospice services) and any additional health services required under the adjusted community rate (ACR) process. MSA plans provide Medicare benefits after a single high deductible is met, and enrollees receive an annual deposit in their Medical Savings Account. Transition rules for current Medicare HMO program also provided.

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

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

**Hospital Insurance**

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

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

**1972** Services of interns and residents in podiatry training.

**1980** Unlimited home health visits in a year. Requirement for prior hospitalization eliminated. Home health services provided for up to 4 days a week and up to 21 consecutive days. Alcohol detoxification facility services.

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

Alcohol detoxification facility services eliminated.

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

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

<b>1986</b>	<p>Set the Part A deductible for 1987 at \$520 with resulting increases in cost sharing. Increased the Part A deductible annually by the applicable percentage increase in the hospital prospective payment rates.</p> <p>Hospice care benefit (enacted in 1982) made permanent.</p>
<b>1987</b>	<p>Specifies in law that in order to be eligible for home health care, a Medicare beneficiary must have a restricted ability to leave the home, requiring the assistance of another or the aid of a supportive device (such as crutches, a cane, a wheelchair, or a walker).</p>
<b>1988</b>	<p>Enrollee pays annual hospital deductible (set at \$560 for 1989) and Medicare pays balance of covered charges, regardless of the number of days of hospitalization (except for psychiatric hospital care, which is still limited by 190-day lifetime maximum).</p> <p>The number of days in a skilled nursing facility changed to 150 per year. Deletes the requirement for a prior hospital stay of 3 or more consecutive days.</p> <p>Expands home health care to provide care for less than 7 days per week and up to 38 consecutive days.</p> <p>Hospice care extended beyond 210 days when beneficiary is certified as terminally ill.</p> <p>All 1988 provisions became effective Jan. 1, 1989.</p>
<b>1989</b>	<p>The spell of illness and benefit period coverage of laws prior to 1988 return to the determination of inpatient hospital benefits in 1990 and later. After the deductible is paid in benefit period, Medicare pays 100 percent of covered costs for the first 60 days of inpatient hospital care. Coinsurance applies for the next 30 days in a benefit period.</p> <p>The requirement for a prior hospital stay of 3 or more consecutive days is reinstated for skilled nursing facility services. Coverage returns to 100 days post-hospital care per spell of illness with a daily coinsurance rate in effect for days 21 through 100.</p> <p>Home health services return to a limit of 21 consecutive days of care. Provision providing for home health care for fewer than 7 days per week continued due to a court decision.</p> <p>Hospice care is returned to a lifetime limit of 210 days.</p>
<b>1990</b>	<p>Hospice care is extended beyond 210 days when beneficiary is certified as terminally ill.</p>
<b>1997</b>	<p>Home health services not associated with a hospital or skilled nursing facility stay for individuals enrolled in both HI and SMI are transferred from the HI program to the SMI program, effective January 1998. The HI program will continue to cover the first 100 visits following a hospital stay of at least 3 consecutive days or a skilled-nursing facility stay. The cost to the SMI trust fund of the transferred services will phase in over a 6-year period (that is, the HI trust fund will transfer funds to the SMI trust fund during that period).</p> <p>Limits on the number of hours and days that home health care can be provided have been clarified. "Part-time" now defined as skilled-nursing and home health aide services (combined) furnished any number of days per week, for less than 8 hours per day and 28 or fewer hours per week. "Intermittent" now defined as skilled-nursing care provided for fewer than 7 days each week, or less than 8 hours each day (combined) for 21 days or less.</p> <p>Hospice benefit periods are restructured to include two 90-day periods, followed by an unlimited number of 60-day periods.</p> <p>Medicare coverage provided for a number of prevention initiatives, most of which covered under SMI program. HI program affected mainly by two of the initiatives: (1) annual prostate cancer screening for male beneficiaries aged 50 or older, effective Jan. 1, 2000; and (2) colorectal screening procedures, including fecal-occult blood tests and flexible sigmoidoscopies, for beneficiaries age 50 or older, colonoscopy for beneficiaries at high risk for colorectal cancer, and other procedures, including screening barium enemas under certain circumstances.</p>

## Medicare: History of Provisions

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- 2000** Screening colonoscopies are covered for all beneficiaries, not just those at high risk, beginning July 1, 2001. For persons not at high risk, a screening colonoscopy is covered 10 years after a previous one, or 4 years after a screening flexible sigmoidoscopy. (See 1997.)
- Supplementary Medical Insurance**
- 1965** Physician and surgeon services. In-hospital services of anesthesiologists, pathologists, radiologists, and psychiatrists. Limited dental services. Home health services, 100 visits in calendar year. Other medical services including various diagnostic tests, limited ambulance services, prosthetic devices, rental of durable medical equipment used at home (including equipment for dialysis), and supplies used for fractures. For deductible and coinsurance provisions, see table 2.C1.
- Beginning in 1966, the beneficiary pays a \$50 deductible, with a 3-month carryover provision.
- 1967** Outpatient hospital diagnostic services transferred from HI. Includes physical therapy services in a facility. Purchase of durable medical equipment.
- 1972** Physical therapy services furnished by a therapist in his or her office or individual's home (calendar year limit of \$100). Chiropractor services (limited to manual manipulation of the spine). Outpatient services include speech pathology services furnished in, or under arrangements with, a facility or agency. Services of a doctor of optometry in furnishing prosthetic lenses.
- Beginning in 1973, the beneficiary pays a \$60 deductible.
- 1977** Services in rural health clinics.
- 1980** Home health services. Deductible applicable to home health services is eliminated, effective July 1, 1981.
- Facility costs of certain surgical procedures performed in freestanding ambulatory surgical centers.
- Increase in annual limit for outpatient therapy from \$100 to \$500.
- Recognizes comprehensive outpatient rehabilitation facilities as Medicare providers.
- 1981** Beginning in 1982, the beneficiary pays a \$75 deductible, with the carryover provision eliminated.
- 1984** Hepatitis B and pneumococcal vaccines and blood clotting factors and necessary supplies are included as Part B benefits. Debridement of mycotic toenails is limited.
- For outpatient physical therapy services, includes services of a podiatrist. For outpatient ambulatory surgery, includes services of a dentist and podiatrist furnished in his or her office.
- 1986** Includes vision care services furnished by an optometrist.
- For occupational therapy services, includes services furnished in a skilled nursing facility (when Part A coverage has been exhausted), in a clinic, rehabilitation agency, public health agency, or by an independently practicing therapist.
- Includes outpatient (in addition to previously covered inpatient) immunosuppressive drugs for 1 year after covered transplant.
- Includes occupational therapy services provided in certain delivery settings.
- For ambulatory surgical procedures performed in ambulatory surgical centers, hospital outpatient departments, and certain physician offices, the Part B coinsurance and deductible are no longer waived.
- 1987** Increases the maximum payment for mental health services and includes outpatient mental health services provided by ambulatory hospital-based or hospital-affiliated programs under the supervision of a physician.

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

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

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

**1988**

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

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

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

**1989**

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

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

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

**1990**

Beginning in 1991, routine mammography screenings are covered.

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

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

**1993**

Includes coverage of oral, self-administered anticancer drugs.

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

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

**1997**

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

Coverage provided for a number of prevention initiatives, including (1) annual screening mammograms for female beneficiaries age 40 or older, with SMI deductible waived; (2) screening pap smear and pelvic exam (including clinical breast exam) every 3 years or annually for beneficiaries at higher risk, with SMI deductible waived; (3) annual prostate cancer screening for male beneficiaries aged 50 or older, effective Jan. 1, 2000; (4) colorectal screening procedures, including fecal-occult blood tests and flexible sigmoidoscopies, for beneficiaries aged 50 or older, colonoscopy for beneficiaries at high

risk for colorectal cancer, and other procedures, including screening barium enemas under certain circumstances; (5) diabetes outpatient self-management training in nonhospital-based programs (previously covered in hospital-based programs only) and blood glucose monitors and testing strips for all diabetics (previously provided for insulin-dependent diabetics only), effective July 1, 1998; (6) procedures to identify bone mass, detect bone loss, or determine bone quality for certain qualified beneficiaries, at frequencies determined by the Secretary of HHS, effective July 1, 1998.

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

**1999**

The coverage period for immunosuppressive drugs after a transplant is lengthened to 44 months, for individuals who exhaust their 36 months of coverage in 2000. For those exhausting their 36 months of coverage in 2001, at least 8 more months will be covered. (The Secretary of HHS will specify the increase, if any, beyond 8 months.) For those exhausting their 36 months of coverage in 2002, 2003, or 2004, the number of additional months may be more or less than 8. (The Secretary will specify the increase for each of these years.) (See 1993.)

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

**2000**

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

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

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

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

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

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

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



## Medicare Financing

### Hospital Insurance Taxes

See table 2.A3.

### Appropriations from General Revenues

- 1965** For HI costs attributable to transitionally insured beneficiaries.  
For HI costs attributable to noncontributory wage credits granted for military service prior to 1957 (see table 2.A2).  
For the SMI program, an amount equal to participant premiums.
- 1972** For cost of SMI not met by enrollee premiums.
- 1982** For HI costs attributable to beneficiaries having transitional entitlement based on Medicare-qualified federal employment.
- 1983** For HI taxes on noncontributory wage credits granted for military service (a) from the inception of HI program through 1983 and (b) on a current basis, annually, beginning in 1984 (see table 2.A2).

### Participant Premiums

See also table 2.C1.

- 1965** SMI enrollee premium rate (originally \$3 per month) to be established annually such as to pay one-half of program costs.
- 1972** SMI enrollee premium rate increase limited to rate of increase in OASDI cash benefits.  
HI premium (originally \$33 per month) to be established annually. Only individuals not otherwise entitled to HI but desiring voluntary participation need to pay the HI premium.
- 1983** SMI enrollee premiums for July 1983, to Dec. 31, 1983, frozen at premium level of June 30, 1983. Premiums for Jan. 1, 1984, to Dec. 31, 1985, set to cover 25 percent of aged program costs.
- 1984** SMI enrollee premiums for Jan. 1, 1986, to Dec. 31, 1987, will be set to cover 25 percent of aged program costs. Increases in the SMI premium may not exceed the dollar amount of the Social Security cost-of-living adjustment.  
For calculating the amount of SMI premium surcharge for individuals from age 65 up to age 70 not previously enrolled in SMI, the number of years an individual did not enroll because of coverage by employer group health insurance will not be taken into account.
- 1985** Extends through calendar year 1988 the requirement that SMI premiums be set to cover 25 percent of aged program costs and that increases in the SMI premium may not exceed the dollar amount of the Social Security cost-of-living adjustment.  
Premium-paying individuals who do not purchase Part A coverage within a specific time after becoming eligible because of age are subject to a 10-percent penalty for each 12 months they are late in enrolling. There is a cutoff on the length of time these individuals will have to pay an enrollment penalty. The 10-percent premium penalty would be limited to twice the number of years enrollment was delayed. Therefore, if enrollment were delayed 1 year, the penalty would be assessed for 2 years. Individuals in this category and already enrolled will have the length of time the higher premium was paid credited to them.
- 1987** Extends through calendar year 1989 the provisions requiring that the SMI premium be set to cover 25 percent of aged program costs, prohibiting any increase in the premium if there is no Social Security cost-of-living adjustment, and continuing to hold beneficiaries harmless from Social Security check reductions as a result of a premium increase.
- 1988** Increases in the SMI premium may not exceed the dollar amount of the Social Security cost-of-living adjustments for 1989 and beyond.

## Medicare: History of Provisions

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<b>1989</b>	Extends through calendar year 1990 the requirement that SMI premiums be set to cover 25 percent of aged program costs.
<b>1990</b>	The SMI premium are \$29.90 in 1991; \$31.80 in 1992; \$36.60 in 1993; \$41.10 in 1994; and \$46.10 in 1995.
<b>1993</b>	SMI enrollee premiums for Jan. 1, 1996, to Dec. 31, 1998, will be set to cover 25 percent of aged program costs.
<b>1997</b>	The SMI premium is permanently set at 25 percent of program costs.
	<b>Income from Taxation of OASDI Benefits</b>
<b>1993</b>	The additional income tax revenues resulting from the increase in the taxable percentage applicable to OASDI benefits (an increase from 50 percent to 85 percent, see table 2.A31) are transferred to the HI Trust Fund.
	<b>Interfund Borrowing</b>
<b>1981</b>	See table 2.A6.
<b>1983</b>	See table 2.A6.

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## Medicaid

The following summary of the Medicaid program is intended for informational purposes only. It is not an official statement of policy that can be relied upon in lieu of the appropriate law, regulations, and rulings. This narrative is not intended to render legal or other professional advice; therefore, it should not be relied upon for making specific legal decisions. Instead, the law, regulations, and rulings should be consulted for purposes of making such decisions.

### Overview

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

Within broad national guidelines established by federal statutes, regulations, and policies, each state (1) establishes its own eligibility standards; (2) determines the type, amount, duration, and scope of services; (3) sets the rate of payment for services; and (4) administers its own program. Medicaid policies for eligibility, services, and payment are complex and vary considerably, even among states of similar size or geographic proximity. Thus, a person who is eligible for Medicaid in one state may not be eligible in another state, and the services provided by one state may differ considerably in amount, duration, or scope from services provided in a similar or neighboring state. In addition, state legislatures may change Medicaid eligibility and/or services during the year.

### Basis of Eligibility and Maintenance Assistance Status

Medicaid does not provide medical assistance for all poor persons. Under the broadest provisions of the federal statute, Medicaid does *not* provide health care services even for very poor persons *unless* they are in one of the groups designated below. Low income is only one test for Medicaid eligibility for those within these groups; their resources also are tested against threshold levels (as determined by each state within federal guidelines).

States generally have broad discretion in determining which groups their Medicaid programs will cover and the financial criteria for Medicaid eligibility. To be eligible for federal funds, however, states are *required* to provide Medicaid coverage for certain individuals who receive federally assisted income-maintenance payments, as well as for

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

- Individuals are generally eligible for Medicaid if they meet the requirements for the Aid to Families with Dependent Children (AFDC) program that were in effect in their state on July 16, 1996, or—at state option—more liberal criteria.
- Children under age 6 whose family income is at or below 133 percent of the federal poverty level (FPL).
- Pregnant women whose family income is below 133 percent of the FPL (services to these women are limited to those related to pregnancy, complications of pregnancy, delivery, and postpartum care).
- Supplemental Security Income (SSI) recipients in most states (some states use more restrictive Medicaid eligibility requirements that pre-date SSI).
- Recipients of adoption or foster care assistance under title IV of the Social Security Act.
- Special protected groups (typically individuals who lose their cash assistance due to earnings from work or from increased Social Security benefits, but who may keep Medicaid for a period of time).
- All children born after September 30, 1983 who are under age 19, in families with incomes at or below the FPL (this process phases in coverage, so that by the year 2002 all such poor children under age 19 will be covered).
- Certain Medicare beneficiaries (described later).

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

- Infants up to age 1 and pregnant women not covered under the mandatory rules whose family income is no more than 185 percent of the FPL (the percentage amount is set by each state).
- Children under age 21 who meet the AFDC income and resources requirements that were in effect in their state on July 16, 1996.

- Institutionalized individuals eligible under a "special income level" (the amount is set by each state—up to 300 percent of the SSI federal benefit rate).
- Individuals who would be eligible if institutionalized, but who are receiving care under home and community-based services waivers.
- Certain aged, blind, or disabled adults who have incomes above those requiring mandatory coverage, but below the FPL.
- Recipients of state supplementary income payments.
- Certain working-and-disabled persons with family income less than 250 percent of the FPL who would qualify for SSI if they did not work.
- TB-infected persons who would be financially eligible for Medicaid at the SSI income level if they were within a Medicaid-covered category (however, coverage is limited to TB-related ambulatory services and TB drugs).
- "Optional targeted low-income children" included within the State Children's Health Insurance Program (SCHIP) established by the Balanced Budget Act (BBA) of 1997 (Public Law 105-33).
- "Medically needy" persons (described below).

The medically needy (MN) option allows states to extend Medicaid eligibility to additional persons. These persons would be eligible for Medicaid under one of the mandatory or optional groups, except that their income and/or resources are above the eligibility level set by their state. Persons may qualify immediately or may "spend down" by incurring medical expenses that reduce their income to or below their state's MN income level.

Medicaid eligibility and benefit provisions for the *medically needy* do not have to be as extensive as for the *categorically needy*, and may be quite restrictive. Federal matching funds are available for MN programs. However, if a state elects to have a MN program, there are federal requirements that certain *groups* and certain *services* must be included; that is, children under age 19 and pregnant women who are medically needy must be covered, and prenatal and delivery care for pregnant women, as well as ambulatory care for children, must be provided. A state may elect to provide MN eligibility to certain additional groups and may elect to provide certain additional services within its MN program. Currently, 38 states have elected to have a MN program and are providing at least some MN services to at least some MN recipients. All remaining states utilize the "special income level" option to extend Medicaid to the "near poor" in medical institutional settings.

The Personal Responsibility and Work Opportunity Reconciliation Act of 1996 (Public Law 104-193)—known as the "welfare reform" bill—made restrictive changes regarding eligibility for SSI coverage that impacted the Medicaid program. For example, legal resident aliens and

other qualified aliens who entered the United States on or after August 22, 1996 are ineligible for Medicaid for 5 years. Medicaid coverage for most aliens entering before that date and coverage for those eligible after the 5-year ban are state options; emergency services, however, are mandatory for both of these alien coverage groups. For aliens who lose SSI benefits because of the new restrictions regarding SSI coverage, Medicaid can continue only if these persons can be covered for Medicaid under some other eligibility status (again with the exception of emergency services, which are mandatory). Public Law 104-193 also affected a number of disabled children, who lost SSI as a result of the restrictive changes; however, their eligibility for Medicaid was reinstated by Public Law 105-33, the BBA.

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

Title XXI of the Social Security Act, known as the State Children's Health Insurance Program (SCHIP), is a new program initiated by the BBA. In addition to allowing states to craft or expand an existing state insurance program, SCHIP provides more federal funds for states to expand Medicaid eligibility to include a greater number of children who are currently uninsured. With certain exceptions, these are low-income children who would not qualify for Medicaid based on the plan that was in effect on April 15, 1997. Funds from SCHIP also may be used to provide medical assistance to children during a presumptive eligibility period for Medicaid. This is one of several options from which states may select to provide health care coverage for more children, as prescribed within the BBA's Title XXI program.

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

The Ticket to Work and Work Incentives Improvement Act of 1999 (Public Law 106-170) provides or continues

Medicaid coverage to certain disabled beneficiaries who work despite their impairment. Those with higher incomes may pay a sliding scale premium based on income.

### Scope of Medicaid Services

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

- Inpatient hospital services.
- Outpatient hospital services.
- Prenatal care.
- Vaccines for children.
- Physician services.
- Nursing facility services for persons aged 21 or older.
- Family planning services and supplies.
- Rural health clinic services.
- Home health care for persons eligible for skilled-nursing services.
- Laboratory and x-ray services.
- Pediatric and family nurse practitioner services.
- Nurse-midwife services.
- Federally qualified health-center (FQHC) services, and ambulatory services of an FQHC that would be available in other settings.
- Early and periodic screening, diagnostic, and treatment (EPSDT) services for children under age 21.

States may also receive federal matching funds to provide certain *optional* services. Following are the most common of the 34 currently approved optional Medicaid services:

- Diagnostic services.
- Clinic services.
- Intermediate care facilities for the mentally retarded (ICFs/MR).
- Prescribed drugs and prosthetic devices.
- Optometrist services and eyeglasses.
- Nursing facility services for children under age 21.
- Transportation services.
- Rehabilitation and physical therapy services.
- Home and community-based care to certain persons with chronic impairments.

The BBA included a state option known as programs of all-inclusive care for the elderly (PACE). PACE provides an alternative to institutional care for persons aged 55 or older who require a *nursing facility level* of care. The PACE team

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

### Amount and Duration of Services

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

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

### Payment for Services

Medicaid operates as a vendor payment program. States may pay health care providers directly on a fee-for-service basis, or states may pay for Medicaid services through various prepayment arrangements, such as health maintenance organizations (HMOs). Within federally imposed upper limits and specific restrictions, each state for the most part has broad discretion in determining the payment methodology and payment rate for services. Gen-

erally, payment rates must be sufficient to enlist enough providers so that covered services are available at least to the extent that comparable care and services are available to the general population within that geographic area. Providers participating in Medicaid must accept Medicaid payment rates as payment in full. States must make additional payments to qualified hospitals that provide inpatient services to a disproportionate number of Medicaid recipients and/or to other low-income or uninsured persons under what is known as the "disproportionate share hospital" (DSH) adjustment. During 1988–1991, excessive and inappropriate use of the DSH adjustment resulted in rapidly increasing federal expenditures for Medicaid. However, under legislation passed in 1991, 1993, and again within the BBA of 1997, the federal share of payments to disproportionate share hospitals has become increasingly limited.

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

The federal government pays a share of the medical assistance expenditures under each state's Medicaid program. That share, known as the federal medical assistance percentage (FMAP), is determined annually by a formula that compares the state's average per capita income level with the national income average. States with a higher per capita income level are reimbursed a smaller share of their costs. By law, the FMAP cannot be lower than 50 percent or higher than 83 percent. In 2001, the FMAPs varied from 50 percent in 10 states to 76.82 percent in Mississippi, and averaged 57 percent overall. The BBA also permanently raised the FMAP for the District of Columbia from 50 percent to 70 percent and raised the FMAP for Alaska from 50 percent to 59.8 percent through 2000. The Medicare, Medicaid, and SCHIP Benefits Improvement and Protection Act (BIPA) of 2000 (Public Law 106-554) further adjusted Alaska's FMAP to a higher level for 2001–2005. For the children added to Medicaid through the SCHIP program, the FMAP average for all states is about 70 percent, compared to the general Medicaid average of 57 percent.

The federal government also reimburses states for 100 percent of the cost of services provided through facilities of the Indian Health Service, provides financial help to the 12 states that furnish the highest number of emergency services to undocumented aliens, and shares in each state's expenditures for the administration of the Medicaid program. Most administrative costs are matched at 50 percent, although higher percentages are paid for certain activities and functions, such as development of mechanized claims processing systems.

Except for the SCHIP program, the Qualifying Individuals (QI) program (described later), and DSH payments, federal payments to states for medical assistance have no set limit (cap). Rather, the federal government matches (at FMAP rates) state expenditures for the mandatory services, as well as for the optional services that the individual state decides to cover for eligible recipients, and matches (at the appropriate administrative rate) all necessary and proper administrative costs. The Medicare, Medicaid, and SCHIP Balanced Budget Refinement Act of 1999 (as incorporated into Public Law 106-113, the appropriations bill for the District of Columbia for fiscal year 2000) increased the amount that certain states and the territories can spend on DSH and SCHIP payments, respectively. The BIPA set upper payment limits for inpatient and outpatient services provided by certain types of facilities.

### Summary and Trends

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

In most years since its inception, Medicaid has had very rapid growth in expenditures, although the rate of increase has subsided somewhat recently. This rapid growth in Medicaid expenditures has been due primarily to the following factors:

- The increase in size of the Medicaid-covered populations as a result of federal mandates, population growth, and the earlier economic recession. In recent years Medicaid enrollment has declined somewhat.
- The expanded coverage and utilization of services.
- The DSH payment program, coupled with its inappropriate use to increase federal payments to states.
- The increase in the number of very old and disabled persons requiring extensive acute and/or long-term health care and various related services.
- The results of technological advances to keep a greater number of very low-birth-weight babies and other critically ill or severely injured persons alive and in need of continued extensive and very costly care.
- The increase in payment rates to providers of health care services, when compared to general inflation.

As with all health insurance programs, most Medicaid recipients require relatively small average expenditures per person each year, and a relatively small proportion incurs very large costs. Moreover, the average cost varies substantially by type of beneficiary. The data for 1998, for example, indicate that Medicaid payments for services for 20.6 million children, who constitute 51 percent of all Medicaid recipients, average about \$1,150 per child (a relatively small average expenditure per person). Similarly, for 8.6 million adults, who comprise 21 percent of recipients, payments average about \$1,775 per person. However, certain other specific groups have much larger per-person expenditures. Medicaid payments for services for 4 million aged, constituting 11 percent of all Medicaid recipients, average about \$9,700 per person; for 7.2 million disabled, who comprise 18 percent of recipients, payments average about \$8,600 per person. When expenditures for these high- and lower-cost recipients are combined, the 1998 payments to health care vendors for 40.6 million Medicaid recipients average \$3,500 per person.

Long-term care is an important provision of Medicaid that will be increasingly utilized as our nation's population ages. The Medicaid program has paid for almost 45 percent of the total cost of care for persons using nursing facility or home health services in recent years. However, for those persons who use more than 4 months of this long-term care, Medicaid pays for a much larger percentage. The data for 1998 show that Medicaid payments for nursing facility services (excluding ICFs/MR) and home health care totaled \$41.3 billion for more than 3.3 million recipients of these services—an average 1998 expenditure of \$12,375 per long-term care recipient. With the percentage of our population who are elderly or disabled increasing faster than that of the younger groups, the need for long-term care is expected to increase.

Another significant development in Medicaid is the growth in managed care as an alternative service delivery concept different from the traditional fee-for-service system. Under managed care systems, HMOs, prepaid health plans, or comparable entities agree to provide a specific set of services to Medicaid enrollees, usually in return for a predetermined periodic payment per enrollee. Managed care programs seek to enhance access to quality care in a cost-effective manner. Waivers may provide the states with greater flexibility in the design and implementation of their Medicaid managed care programs. Waiver authority under sections 1915(b) and 1115 of the Social Security Act is an important part of the Medicaid program. Section 1915(b) waivers allow states to develop innovative health care delivery or reimbursement systems. Section 1115 waivers allow statewide health care reform experimental demonstrations to cover uninsured populations and to test new delivery systems without increasing costs. Finally, the BBA provided states a new option to use managed care. The number of Medicaid beneficiaries enrolled in some form of

managed care program is growing rapidly, from 14 percent of enrollees in 1993 to 54 percent in 1998.

Medicaid data as reported by the states indicate that more than 41.0 million persons received health care services through the Medicaid program in 1999 (the last year for which recipient data are available). Total outlays for the Medicaid program in 2000 included direct payment to providers of \$146.4 billion, payments for various premiums (for HMOs, Medicare, etc.) of \$33.9 billion, payments to the disproportionate share hospitals of \$14.4 billion, and administrative costs of \$10.6 billion.

The total expenditure for the nation's Medicaid program in 2000, excluding administrative costs, was \$194.7 billion (\$111.1 billion in federal and \$83.6 billion in state funds). With anticipated impacts from the BBA, projections now are that total Medicaid outlays may be \$334.9 billion in fiscal year 2006, with an additional \$4.3 billion expected to be spent for the new SCHIP.

### Medicaid-Medicare Relationship

Medicare beneficiaries who have low incomes and limited resources may also receive help from the Medicaid program. For such persons who are eligible for *full* Medicaid coverage, the Medicare health care coverage is supplemented by services that are available under their state's Medicaid program, according to eligibility category. These additional services may include, for example, nursing facility care beyond the 100-day limit covered by Medicare, prescription drugs, eyeglasses, and hearing aids. For persons enrolled in both programs, any services that are covered by Medicare are paid for by the Medicare program before any payments are made by the Medicaid program, since Medicaid is always the "payer of last resort."

Certain other Medicare beneficiaries may receive help with Medicare premium and cost-sharing payments through their state Medicaid program. Qualified Medicare beneficiaries (QMBs) and specified low-income Medicare beneficiaries (SLMBs) are the best-known categories and the largest in numbers. QMBs are those Medicare beneficiaries who have resources at or below twice the standard allowed under the SSI program, and incomes at or below 100 percent of the FPL. For QMBs, Medicaid pays the Hospital Insurance (HI) and Supplementary Medical Insurance (SMI) premiums and the Medicare coinsurance and deductibles, subject to limits that states may impose on payment rates. SLMBs are Medicare beneficiaries with resources like the QMBs, but with incomes that are higher, though still less than 120 percent of the FPL. For SLMBs, the Medicaid program pays only the SMI premiums. A third category of Medicare beneficiaries who may receive help consists of disabled-and-working individuals. According to the Medicare law, disabled-and-working individuals who previously qualified for Medicare because of disability, but who lost entitlement because of their return to work (despite the disability), are allowed to purchase Medicare

## Medicaid

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HI and SMI coverage. If these persons have incomes below 200 percent of the FPL but do not meet any other Medicaid assistance category, they may qualify to have Medicaid pay their HI premiums as qualified disabled and working individuals (QDWIs). According to CMS estimates, Medicaid currently provides some level of supplemental health coverage for 5 million Medicare beneficiaries within the above three categories.

For Medicare beneficiaries with incomes that are above 120 percent and less than 175 percent of the FPL, the BBA establishes a capped allocation to states, for each of the 5 years beginning January 1998, for payment of all or some of the Medicare SMI premiums. These beneficiaries are known as qualifying individuals (QIs). Unlike QMBs and SLMBs, who may be eligible for other Medicaid benefits in addition to their QMB/SLMB benefits, the QIs cannot be otherwise eligible for medical assistance under a state plan. The payment of this QI benefit is 100 percent federally funded, up to the state's allocation.

*Note: Medicaid data are based on the projections of the Midsession Review of the President's Fiscal Year 2002 Budget and are consistent with data received from the states on the Forms HCFA-2082, HCFA-37, and HCFA-64.*



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## Unemployment Insurance

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

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

In addition, the Social Security Act authorized grants to states to meet the costs of administering the state systems. By July 1937, all 48 states, the then territories of Alaska and Hawaii, and the District of Columbia had passed unemployment insurance laws. Later, Puerto Rico adopted its own unemployment insurance program, which was incorporated in 1961 into the federal-state system. A similar program for workers in the Virgin Islands was added in 1978.

If employers are to receive an offset against federal taxes and if states are to receive federal grants for administration, federal law requires state unemployment insurance programs to meet certain requirements. These requirements are intended to assure that a state participating in the program has an unemployment insurance system that is fairly administered and financially secure.

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

Aside from federal standards, each state has major responsibility for the content and development of its unemployment insurance law. The state itself decides the amount and duration of benefits (except for certain federal requirements concerning Federal-State Extended Bene-

fits), the contribution rates (with limitations), and, in general, the eligibility requirements and disqualification provisions. The states also directly administer the programs—collecting contributions, maintaining wage records (where applicable), taking claims, determining eligibility, and paying benefits to unemployed workers.

### Coverage

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

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

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

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

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

### Eligibility for Benefits

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

### Work Requirements

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

### Benefits

Under all state laws, the weekly benefit amount—that is, the amount payable for a week of total unemployment—varies with the worker's past wages within certain minimum and maximum limits. In most states, the formula is designed to compensate for a fraction of the usual weekly wage, normally about 50 percent, subject to specified dollar maximums.

Three-fourths of the laws use a formula that computes weekly benefits as a fraction of wages in one or more quarters of the base period. Most commonly, the fraction is taken of wages in the quarter during which wages were highest because this quarter most nearly reflects full-time work. In most of these states, the same fraction is used at all benefit levels. The other laws use a weighted schedule that gives a greater proportion of the high-quarter wages to lower paid workers than to those earning more.

Each state establishes a ceiling on the weekly benefit amount and no worker may receive an amount larger than the ceiling. The maximum may be either a fixed dollar amount or a flexible amount. Under the latter arrangement, which has been adopted in 35 jurisdictions, the maximum is adjusted automatically in accordance with the weekly wages of covered employees.

Twelve states provide additional allowances for certain dependents. They all include children under ages 16, 18, or 19 (and, generally, older if incapacitated); 8 states include a nonworking spouse; and 2 states consider other dependent

relatives. The amount allowed per dependent varies considerably by state but generally is \$24 or less per week and, in the majority of states, the amount is the same for each dependent.

All but 7 states require a waiting period of 1 week of total unemployment before benefits can begin. Three states pay benefits retroactively for the waiting period if unemployment lasts a certain period or if the employee returns to work within a specified period.

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

### Extended Benefits

In the 1970s, a permanent federal-state program of Extended Benefits (EB) was established for workers who exhaust their entitlement to regular state benefits during periods of high unemployment. The program is financed equally from federal and state funds. Employment conditions in an individual state trigger Extended Benefits. This happens when the unemployment rate among insured workers in a state averages 5 percent or more over a 13-week period, and is at least 20 percent higher than the rate for the same period in the 2 preceding years. If the insured unemployment rate reaches 6 percent, a state may by state law disregard the 20-percent requirement in initiating Extended Benefits. Once triggered, Extended Benefit provisions remain in effect for at least 13 weeks. When a state's benefit period ends, Extended Benefits to individual workers also end, even if they have received less than their potential entitlement and are still unemployed. Further, once a state's benefit period ends, another statewide period cannot begin for at least 13 weeks.

State law determines most eligibility conditions for Extended Benefits and the weekly benefit payable. However, under federal law a claimant applying for Extended Benefits must have had 20 weeks in full-time employment (or the equivalent in insured wages) and must meet special work requirements. A worker who has exhausted his or her regular benefits is eligible for a 50-percent increase in duration of benefits for a maximum of 13 weeks of Extended Benefits. There is, however, an overall maximum of 39 weeks of regular and Extended Benefits. Extended Benefits are payable at the same rate as the weekly amount under the regular state program.

Prior to the 1992 legislation, the EB program was based on the insured unemployment rate (IUR)—the number of unemployed workers receiving benefits in a state as a percent of the number of persons in unemployment-insurance covered employment in that state. By definition, the IUR does not include workers who have exhausted their benefits but are still unemployed.

The 1992 legislation (P.L. 102-318) provided states the option of adopting an additional formula for triggering the

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

States triggering on to the Extended Benefits program under other triggers would provide the regular 26 weeks of unemployment benefits in addition to 13 weeks of Extended Benefits, (which is the same number of weeks of benefits provided previously). In addition, states that have chosen the total unemployment rate option will also amend their state laws to add an additional 7 weeks of Extended Benefits (for a total of 20 weeks) where the total unemployment rate is at least 8 percent and is 110 percent of the state's total unemployment rate for the same 3 months in either of the 2 preceding years. As of March 4, 2001, Extended Benefits were payable for 13 weeks in Alaska based on the insured unemployment rate.

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## Workers' Compensation

Workers' compensation provides cash benefits and medical care when employees suffer work-related injuries or illnesses, and survivor benefits to the dependents of workers whose deaths result from a work-related incident. In exchange for receiving benefits, workers who receive workers' compensation are generally not allowed to bring a tort suit against their employers for damages of any kind.

Workers' compensation was the first form of social insurance to develop widely in the United States. The federal government was the first to establish a workers' compensation program, covering its civilian employees with an act that was passed in 1908 to provide benefits for workers engaged in hazardous work. The remaining federal workforce was covered in 1916. Nine states enacted workers' compensation laws in 1911. By 1920, all but 7 states and the District of Columbia had workers' compensation laws.

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

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

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

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

### Coverage

In 1999, state and federal workers' compensation laws covered about 123.9 million employees. Covered payroll in 1999—that is, total wages paid to covered workers—was \$4.1 trillion.

Common exemptions from coverage are domestic service, agricultural employment, small employers, and casual labor. However, 39 programs have some coverage for agricultural workers, and 25 programs have some coverage for domestic workers. Many programs exempt employees of nonprofit, charitable, or religious institutions. The coverage of state and local public employees differs widely from one state program to another.

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

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

### Benefits

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

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

#### Temporary and Permanent Total Disability

A large majority of compensation cases involving cash payments involve temporary total disability. That is, the employee is unable to work at all while he or she is recovering from the injury but the worker is expected to recover. When workers' lost time exceeds the waiting period (3 to 7 days, depending on the state) they receive a percentage of their weekly wages—typically two-thirds—up to a maximum weekly amount. The maximum generally is set at some percentage of the state's average weekly wage, ranging from 66-2/3 percent to 200 percent, but typically 100 percent.

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

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

### Permanent Partial Disability

If the permanent disability of a worker is only partial and may or may not lessen work ability, permanent partial disability benefits are payable. The system for determining benefits in these cases is very complex and varies significantly across jurisdictions. Some states provide benefits based on an impairment rating process. The level of impairment, often expressed as a percent of total disability, is used to determine the benefit amount. Some states provide benefits based on the loss of earning capacity. They use impairment ratings with modifications based on vocational factors, such as the worker's education, job experience, and age. Other states use systems that attempt to compensate workers for actual lost wages.

### Death Benefits

Generally, compensation is related to earnings and to the number of dependents payable to the survivors of workers who die from a work related illness or injury. Benefits are capped in 26 states.

### Medical Benefits

All compensation acts require that medical aid be furnished to workers suffering from a work-related injury or illness without delay, whether or not the condition entails work interruption. This care includes first-aid treatment, physician services, surgical and hospital services, nursing, medical drugs and supplies, appliances, and prosthetic devices. Care is typically provided with no co-payment from the worker.

A few state laws contain provisions for nominal contributions by the covered employee for hospital and medical benefits.

## Financing

Workers' compensation programs are financed almost exclusively by employers and are based on the principle that the cost of work-related accidents is a business expense. Depending on state laws, employers can purchase insurance from a private carrier or state fund, or they can self-insure. No program relies on general taxing power to finance workers' compensation. Employers in most programs are permitted to carry insurance against work accidents with commercial insurance companies or to qualify

as self-insurers by giving proof of financial ability to carry their own risk. In seven jurisdictions, however, commercial insurance is not allowed. In four of these areas, including Puerto Rico and the Virgin Islands, employers must insure with an exclusive state fund, and in three others, they must either insure with an exclusive state insurance fund or self-insure. In 19 jurisdictions, state funds have been established that compete with private insurance carriers. Federal employees are provided protection through a federally financed and operated system.

## Workers' Compensation Program Summary

Benefit payments under workers' compensation programs increased 2.5 percent in 1999 to \$43.4, from the 1998 figure of \$42.3 billion. As a percentage of covered wages, however, benefits fell 3.9 percent from 1.09 to 1.05.

In 1999, medical benefits accounted for \$18.0 billion, and wage loss compensation \$25.3 billion. The latter amount includes payments to disabled workers and the survivors of deceased workers.

The \$43.4 billion for workers' compensation benefit payments in 1999 includes nearly \$1 billion in benefits for the Black Lung program. This program is described separately (see tables 9.B1–9.B3).

The employers' cost of providing workers' compensation coverage generally varies according to risk, industrial classification, and experience rating. Nationally, in 1999, such costs were approximately 1.29 percent of covered payroll, or about \$430 for each of the 123.9 million protected employees.

The year 1999 is the seventh in a row that benefits relative to covered wages declined. It is the sixth consecutive year that employer costs declined relative to covered wages. Benefits as a percentage of wages peaked in 1992 at 1.69 percent. Employer costs peaked in 1993 at 2.17 percent of covered wages.

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## Temporary Disability Insurance

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

Federal law does not provide for a federal-state system of short-term disability comparable to the federal-state system of unemployment insurance. However, the Federal Unemployment Tax Act (FUTA) was amended in 1946 to permit states where employees made contributions under the unemployment insurance program to use some or all of these contributions for the payment of disability benefits (but not for administration). Three of the nine states that could have benefited by this provision for initial funding for temporary disability insurance took advantage of it: California, New Jersey, and Rhode Island. The first state law was enacted by Rhode Island in 1942, followed by legislation in California and the railroad industry in 1946. New Jersey in 1948, and New York in 1949. Then came a hiatus of two decades before Puerto Rico and Hawaii passed laws in 1968 and 1969, respectively.

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

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

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

In California, New Jersey, and Puerto Rico, coverage is provided through a state-operated fund, but employers are permitted to "contract out" of the state fund by purchasing group insurance from commercial insurance companies, by

self-insuring, or by negotiating an agreement with a union or employees' association. Coverage by the state fund is automatic unless or until an employer or the employees take positive action by substituting a private plan that meets the standards prescribed in the law and is approved by the administering agency. Premiums (in lieu of contributions) are then paid directly to the private plan, and benefits are paid to the workers affected.

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

### Eligibility for Benefits

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

### Earnings or Employment Requirements

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

### Disability Requirements

The laws generally define disability as inability to perform regular or customary work because of a physical or mental condition. Stricter requirements are imposed for disability during unemployment in New Jersey and New York. All the laws pay full benefits for disability due to pregnancy.

## Disqualifying Income

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

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

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

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

## Financing and Administration

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

Five of the seven temporary disability insurance programs are administered by the same agency that administers unemployment insurance. Under these five programs, the unemployment insurance administrative machinery is used to collect contributions, to maintain wage records, to determine eligibility, and to pay benefits to workers under the state-operated funds. The New York law is administered by the state Workers' Compensation Board, and the Hawaii law is administered separately in the Department of Labor and Industrial Relations.

By way of contrast, claims in New York and Hawaii are filed with and paid by the employer, the insurance carrier, or the union health and welfare fund that is operating the private plan. The state agency limits its functions with respect to employed workers to exercising general supervision over private plans, to setting standards of performance, and to adjudicating disputed claims arising between claimants and carriers. A similar situation applies to claimants under private plans in California, New Jersey, and Puerto Rico.

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## Black Lung Benefits

The Black Lung benefit program established by the Federal Coal Mine Health and Safety Act of 1969 provides monthly benefit payments to coal miners totally disabled as a result of pneumoconiosis, to the widows of coal miners who died as a result of pneumoconiosis, and to their dependents. The Social Security Administration (SSA) was responsible for the payment and administration of these Part B benefits (miner, survivor, and dependent) with respect to claims filed through June 30, 1973 (and certain survivor cases, before December 31, 1973).

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

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

Under the law, the basic Black Lung benefit rate is 37-1/2 percent of the monthly pay rate for federal employees in the first step of grade GS-2. The basic rate to a miner or widow may be increased according to the number of qualified dependents—50 percent of the basic benefit rate if one dependent qualifies, 75 percent for two dependents, and 100 percent for three or more dependents.

Since Black Lung payments are tied directly to federal employee salary scales, increases are automatically payable when federal salaries are increased.

Reflecting a 2.7 percent adjustment, monthly benefit rates effective January 1, 2001 are:

Miner or widow \$500.50  
Miner or widow and one dependent \$750.80  
Miner or widow and 2 dependents \$875.90  
Miner or widow and 3 or more dependents  
(family benefit) \$1,001.00

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

Under the 1972 amendments to the law, payments were extended to full orphans, parents, brothers, and sisters of deceased miners. Under earlier law, survivor payments were limited to widows and their dependent children (if the miner and spouse were both deceased, no benefits were payable to surviving children). The 1972

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

Significant program data under Part B in 2000 included the following:

- Between December 1999 and 2000, the total number of Black lung beneficiaries dropped from 99,000 to 89,400. The beneficiaries included 11,600 miners, 61,500 widows, and 16,200 dependents.
- Total annual payments declined from \$541.2 million in 1999 to \$509.3 million in 2000.
- The average monthly benefit for miners in December 2000 was \$652.00 and \$495.50 for widows.
- Ninety-seven percent of miners and widows were aged 65 or older in 2000.
- Seventy-three percent of all Black Lung beneficiaries resided in five states in 2000: Pennsylvania, West Virginia, Kentucky, Virginia, and Ohio.



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## Veterans' Benefits

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

### Monetary Benefits

Two major cash benefit programs are available for veterans. The first program provides benefits to veterans with service-connected disabilities and, on the veteran's death, benefits are paid to the eligible spouse and children. These benefits are not means tested—that is, they are payable regardless of other income or resources. The second program provides benefits to needy veterans who have non-service-connected disabilities. These benefits are means tested.

#### Compensation for Service-connected Disabilities

The disability compensation program pays monthly benefits to veterans whose disabilities resulted from injury or disease incurred while in, or aggravated by, active military duty, whether in wartime or peacetime. Individuals discharged or separated from military service under dishonorable conditions are not eligible for compensation payments. The amount of monthly compensation depends on the degree of disability, rated as the percentage of normal function lost. Payments in 2001 range from \$101 a month for a 10-percent disability to \$2,107 a month for total disability. Veterans who have at least a 30-percent service-connected disability are entitled to an additional dependent's allowance. The amount is based on the number of dependents and degree of disability.

#### Pension for Non-service-connected Disabilities

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

Effective December 1, 2000, maximum benefit amounts for non-service-connected disabilities range from \$775 per month for a veteran without a dependent spouse or child to \$1,533 per month for a veteran who is in need of regular aid and attendance and who has one dependent.

For each additional dependent child, the pension is raised by \$132 per month.

#### Benefits for Survivors

The dependency and indemnity compensation (DIC) program provides monthly benefits to the surviving spouse, children (under age 18, disabled, or students), and certain parents of service persons or veterans who die as the result of an injury or disease incurred while in or aggravated by active duty or training, or from a disability otherwise compensable under laws administered by the Department of Veterans Affairs.

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

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

The monthly benefit amount payable to surviving spouses of veterans, who died before January 1, 1993, depends on the last pay rate of the deceased service person or veteran. In 2001, for pay grades E-1 through E-6, a flat monthly rate of \$911 is paid to surviving spouses. Monthly benefits for grades E-7 through E-9 range between \$942 and \$1,038. For veterans who died after January 1, 1993, surviving spouses receive a flat \$911 a month. An additional \$197 a month will be paid to supplement the basic rate if the deceased veteran had been entitled to receive 100-percent service-connected compensation for at least 8 years immediately preceding death. The amounts payable to eligible parents are lower and depend on: (1) the number of parents eligible, (2) their income, and (3) their marital status.

#### Pensions for Non-service-connected Death

Pensions are paid based on need to surviving spouses and dependent children (under age 18, disabled or students) of deceased veterans of the wartime periods specified in the disability pension program. For a pension to be payable, the veteran generally must have met the same service requirements established for the non-service-connected disability pension program, and the surviving spouse must meet the same marriage requirements as under the dependency and indemnity compensation program.

The pension amount depends on the composition of the surviving family and the physical condition of the surviving spouse. In 2001, pensions range from \$519 a month for a surviving spouse without dependent children to \$991 a month for a spouse who is in need of regular aid and attendance and who has a dependent child. The pension is raised by \$132 a month for each additional dependent child.

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

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

#### **Enrollment - Provisions of Hospitalization and Outpatient Medical Care to Veterans**

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

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

#### **Eligibility Requirements**

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

#### **Care for Dependents and Survivors**

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

Defense for dependents of active duty personnel and military retirees and their dependents.

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

#### **Nursing Home Care**

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

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

#### **Other Medical Benefits**

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

### **Educational Assistance**

The post-Vietnam Veterans' Educational Assistance Program (VEAP) is a voluntary contributory matching program for persons entering service after December 31, 1976. To be eligible, the servicemember must have initially contributed to VEAP before April 1, 1987. The Montgomery GI Bill-Active Duty program provides education benefits for individuals entering military service after June 30, 1985, and for certain other individuals. Servicemembers entering active duty have their basic pay reduced \$100 a month for

the first 12 months of their service unless they specifically elect not to participate. An educational assistance program is also available for individuals who enter the Selected Reserve after June 30, 1985.

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

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## Temporary Assistance for Needy Families

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

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

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

### Highlights

#### Work Requirements

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

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

#### Work Activities

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

#### Five-Year Time Limit

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

#### State Maintenance of Effort Requirements

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

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

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

### Additional Funding

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

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

### Penalties

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

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

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

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

### Personal Employability Plans

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

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

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

### State Plans

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

### Job Subsidies

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

### Waivers

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

## Temporary Assistance for Needy Families

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### Effective Dates

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

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

### Tribal Programs

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

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

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

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## Food Stamps

The Food Stamp program was designed to provide a means for persons with no or little income to obtain a nutritionally adequate diet. Under this program, single persons and individuals living in households meeting nationwide standards for income and assets may receive coupons redeemable for food for human consumption and garden seeds and plants. The benefits, which are in the form of coupons or Electronic Benefit Transfer (EBT) payments, are accepted at most retail food stores.

The value of the benefits that a unit receives each month is determined by household size, income, and deductible expenses. Households without income receive an amount equal to 100 percent of the June monthly cost of the Thrifty Food Plan (TFP—a nutritionally adequate diet) for a reference family of four adjusted for household size and economies of scale. This amount is updated every October for the new fiscal year to account for food price increases. As of October 2000, an eligible four-person household in the continental United States with no income receives \$434 per month in food stamps. Households with income receive food stamps valued at the difference between the maximum allotment and 30 percent of their income, after certain allowable deductions.

To qualify for the program, a household must have (1) less than \$2,000 in disposable assets (\$3,000, if one member is aged 60 or older), (2) gross income below 130 percent of the poverty guidelines for the household size, and (3) net income, after subtracting the six deductions listed below, of less than 100 percent of the poverty guidelines. Households with a person aged 60 or older or a disabled person receiving either Supplemental Security Income (SSI), Social Security (OASDI), state general assistance, or veterans' disability benefits (or interim disability assistance pending approval of any of the above programs) may have gross income exceeding 130 percent of the poverty guidelines, if, after subtracting the deductions listed below, the income is lower than 100 percent of the poverty guidelines. One- and two-person households that meet the applicable standard receive at least \$10 a month in food stamps. All households in which all members receive Temporary Assistance to Needy Families (TANF) or SSI are categorically eligible for food stamps without meeting these income or resource criteria.

Net income is computed by deducting the following from monthly gross income:

- (1) Twenty percent of earned income.
- (2) A standard deduction of \$134 for fiscal year 2000.
- (3) The amount paid for dependent care (up to \$200 a month per child under age 2 and \$175 for all other dependents) while the dependent's caretaker is working or looking for work.

- (4) Any out-of-pocket medical expenses in excess of a \$35 deductible for a person aged 60 or older or a disabled person. If more than one person in the household is aged or disabled, \$35 is subtracted once before deducting combined medical expenses.
- (5) A child-support deduction for legally obligated child support paid for a nonhousehold member.
- (6) An excess shelter deduction, which is total shelter costs including utilities minus 50 percent of income after all the above deductions have been subtracted. Effective October 1, 2000, the limit was \$300. For households whose certification period began after March 1, 2001, the limit rose to \$340. Households with an aged or disabled person do not have a limit on this deduction.

Households are certified to receive food stamps for varying lengths of time, depending on their income sources and individual circumstances. Recertification is required at least annually. Households whose sole income is from SSI payments or Social Security benefits are certified for a 1-year period. Moreover, households must report monthly income or expense changes of \$25 or more or other changes in circumstances that would affect eligibility. Families with income or food loss resulting from disaster situations such as tornadoes or floods may be eligible for food stamps for up to 1 month if they meet the special disaster income and asset limits.

Special provisions allow the homeless, drug addicts, alcoholics, blind, or disabled residents in certain group living arrangements, residents of shelters for battered spouses and children, and persons aged 60 or older to use their coupons for meals prepared at a nonprofit facility. The elderly and homeless may also use their coupons to purchase concession-priced meals from authorized restaurants. Households with members who are elderly (aged 60 or older), disabled, or lack transportation to the food stamp office may be certified for food stamps through a telephone interview or a home visit.

Initiated on a pilot basis in 1961, the Food Stamp program was formally established by the Food Stamp Act of 1964, with 22 states operating 43 projects, serving 350,000 people. The Food Stamp Act of 1977, as amended (P.L. 95-113), has been extended to all 50 states, the District of Columbia, Guam, and the Virgin Islands. Authorization for this program extends through September 30, 2002. (Since July 1982, Puerto Rico receives a block grant for nutrition assistance rather than participating in the Food Stamp program.) The Food Stamp program is administered nationally by the Food and Nutrition Service of the Department of Agriculture (USDA) and operates through local welfare offices and the nation's food marketing and banking systems. Since August 1, 1980, persons receiving or applying for SSI payments have been permitted to apply for food

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

### History of Provisions

Originally, food stamp coupons were purchased by participants. The difference between the face value of the coupons and the amount the participant paid was known as the "bonus value." The amount paid for coupons varied according to household income.

Legislation in 1971 established uniform national eligibility standards and uniform national benefit levels, required family allotments large enough to purchase a nutritionally adequate diet, provided free food stamps to the poorest recipients, required automatic cost-of-living increases in food stamp allotments, and established work-registration requirements for able-bodied adult household members up to age 65 (except students and those needed at home to care for children under age 18). Legislation in 1973 expanded the program (while phasing out the family food distribution program), provided for semi-annual allotments of coupon adjustments, and broadened the categories of persons eligible to participate. The 1973 legislation extended the program nationwide, requiring all states to participate in the Food Stamp program.

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

Legislation in 1979 provided a medical deduction to aged and disabled persons, removed the limit on their shelter deduction, and tightened fraud provisions.

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

The Omnibus Budget Reconciliation Act and the Food Stamp and Commodity Distribution Amendments of 1981 mandated further changes in the Food Stamp program. For the first time, a "gross income" eligibility standard was applied to all households not containing an aged or disabled person. The earnings deduction was lowered to 18 percent. The updates to the TFP to account for inflation

were postponed until October 1982 and the deduction limits were postponed until July 1983. For new participants, benefits for the first month were prorated from the day the application was filed. Boarders and persons who take part in strikes were excluded from the program and the definition of what constitutes a household was tightened. Provisions facilitating claims and overpayment collection and fraud recovery were also enacted. The program in Puerto Rico was replaced by a block grant and monthly reporting/retrospective accounting systems were made mandatory for all states effective October 1983. However, households composed solely of all aged or disabled persons, as defined above, were exempted from the monthly reporting requirements, and migrant households were exempted from both requirements.

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

The Food Stamp program authorization was extended for 5 years by the Food Security Act of 1985 (P.L. 99-198). Among the revisions enacted, the definition of disability for food stamp purposes was again extended to include recipients of State supplementary SSI payments, government disability benefits, and Railroad Retirement disability payments. Households in which all members receive AFDC or SSI were made categorically eligible for food stamps. The earned income, childcare, excess shelter cost deductions, and asset limits were increased as of May 1986. Portions of the income received under the Job Training Partnership Act were now considered countable income. Further, all states were required to implement an employment and training program for food stamp recipients by April 1987.

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



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

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

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

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

The Omnibus Budget Reconciliation Act of 1993 (Mickey Leland Childhood Hunger Relief Act) made a number of program revisions including the following.

- The earnings of elementary or high school students who were aged 21 or younger were disregarded.
- Households that had breaks in participation of less than a month were allowed to receive a full month's benefit for the period of the break.
- The children of drug addicts and alcoholics living in treatment centers were permitted to qualify for food stamps.
- Food stamp households participating in demonstration projects were permitted to accumulate up to \$10,000 in resources.
- The shelter cap was raised to \$231 beginning July 1, 1994, then to \$247 beginning October 1995, and was to be eliminated entirely on January 1, 1997.
- The deduction for care of a child or other dependent was raised to \$200 per month for a child under age 2, and \$175 per month for all other dependents, effective September 1, 1994.
- State agencies were given the option to provide deductions for legally binding child support payments made to persons outside the household, effective

September 1, 1994. This deduction became mandatory October 1, 1995.

- The definition of a food stamp household was simplified to allow adult siblings who lived together and adult children who lived with their parents to form separate households if they purchased or prepared food separately.
- The amount of the Fair Market Value of a household's first vehicle that is excluded from the asset test was increased from \$4,500 to \$4,550, effective September 1, 1995. The limit was to have been raised to \$5,000, effective October 1, 1996, and indexed thereafter.

Legislation enacted in 1994 primarily provided means to combat fraud in the coupon redemption process. Legislation enacted in 1995, prevented a one-time decrease of food stamp allotments in Alaska for the year beginning October 1, 1994, even though the cost of the TFP for Alaska had declined slightly.

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

- Legal immigrants became ineligible for benefits, unless they met one of the following criteria: were naturalized citizens, had worked and paid taxes in the country for 40 quarters (or were the spouse or minor child of someone who had met the work requirement), had served in the U.S. Armed Forces (or were the spouse or child or a veteran) or were refugees, asylees, or persons granted a stay of deportation when admitted and have lived in the United States for less than 5 years. Legal immigrants currently receiving benefits were allowed to receive benefits until their first recertification after April 1, 1997, or until August 22, 1997, whichever date came first.
- Time limits were imposed for childless unemployed adults aged 18-50. Those who are not disabled are limited to receiving 3 months of benefits in any 36-month period, unless they are working 20 hours per week, participating in a work training program for at least 20 hours per week, or participating in work fare. States may request waivers for areas with at least 10-percent unemployment or insufficient jobs.

Other key provisions included the following:

- The maximum allotment was set at 100 percent of the Thrifty Food Plan, effective October 1, 1996.
- The standard deduction was frozen at \$134.
- The excess shelter deduction cap was set at \$250, effective January 1, 1997 (instead of being lifted), to be raised to \$275 on October 1, 1998, and \$300 on October 1, 2000.

## Food Stamps

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

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

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

Other provisions reduced the funding for Employment and Training Programs by \$100 million in 1999 and by \$45 million in 2000 and reduced payments for Food Stamp program administrative costs.

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

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

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

An estimated 17.2 million persons per month participated in the Food Stamp program during fiscal year 2000. The average monthly value of food stamps per person was about \$72.79 and the total value of benefits issued during the year was \$15.0 billion. Total federal government costs for this program were \$17.1 billion.

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## Low-Income Home Energy Assistance Program

The Omnibus Budget Reconciliation Act of 1981 (P.L. 97-35), signed into law by the President on August 13, 1981, authorized seven block grants to be administered by the Department of Health and Human Services (HHS).<sup>1</sup> As one of HHS' block grants, the Low-Income Home Energy Assistance Program (LIHEAP) is administered by the Administration of Children and Families' Office of Community Services. Title XXVI of the Act authorized LIHEAP for fiscal years 1982–84. Title VI of the Human Services Reauthorization Act of 1984 (P.L. 98-88) reauthorized and amended LIHEAP for fiscal years 1985–86. Title V of the Human Services Reauthorization Act of 1986 (P.L. 99-425) reauthorized and amended LIHEAP for fiscal years 1987–90. Title VII of the Augustus F. Hawkins Human Services Reauthorization Act of 1990 (P.L. 101-501) reauthorized and amended LIHEAP for fiscal years 1991–94. Title XX of the National Institutes of Health Revitalization Act of 1993 (P.L. 103-43) reauthorized LIHEAP for fiscal year 1995. Title III of the Human Services Amendments of 1994 (P.L. 103-252) reauthorized and amended LIHEAP for fiscal years 1995–99. Title III of the Coats Human Services Reauthorization Act of 1996 (P.L. 105-285) reauthorized and amended LIHEAP for fiscal years 2000–04.

Reauthorizing the LIHEAP program for fiscal year 1995 through fiscal year 1999, the Human Services Amendments of 1994, Public Law 103-252, made a number of revisions to the LIHEAP statute.<sup>2</sup> There were no new provisions that became effective in fiscal years 1997–99.

Under LIHEAP, grants are provided to the states to assist eligible households to meet the costs of home energy. In addition to the 50 states and the District of Columbia, grants were provided in:

- fiscal year 1997 to 6 insular areas, and 121 Indian tribes or tribal organizations;
- fiscal year 1998 to 6 insular areas, and 128 Indian tribes or tribal organizations; and
- fiscal year 1999 to 5 insular areas, and 130 Indian tribes or tribal organizations. Fiscal year 1999 represents the nineteenth year that an energy assistance program has been administered at the federal level by HHS.

In accordance with the act, the Secretary of HHS has left maximum policy discretion to the states. The federal information collection and reporting requirements for states were substantially reduced to require only information

essential to federal administration and congressional oversight. State decisions, directed by public participation in the development of grant applications, largely replaced federal regulations in shaping the program for fiscal years 1982–99.

### Funding

For fiscal year 1997, \$1 billion was appropriated under P.L. 104-298, including the set aside of \$25 million for leveraging incentive awards. The President released an additional \$215 million in emergency contingency funds in response to an extraordinary cold wave and increases in bulk fuel prices during the 1996–97 winter. Fiscal year 1997 funds were distributed approximately as follows:

- (1) \$965 million in block grants to the 50 states and the District of Columbia;
- (2) \$9 million in direct block grants to 121 Indian tribes and tribal organizations;
- (3) \$1.3 million in block grants to the Commonwealth of Puerto Rico, Virgin Islands, America Samoa, Guam, the Commonwealth of the Northern Mariana Islands, and the Trust Territory of the Pacific Islands/Palau; and
- (4) \$18.8 million in leveraging incentive awards to 39 states, and 26 tribes and tribal organizations
- (5) \$6.2 million in REACH awards to 6 states, 3 tribes and tribal organizations;
- (6) \$212 million in emergency contingency funds to 50 states and the District of Columbia, \$3 million to 121 Indian tribes and tribal organizations, \$200,000 to 6 insular areas; and
- (7) \$0.3 million for training and technical assistance.

For fiscal year 1998, \$1 billion was appropriated as advanced funding under P.L. 104-208, including the set aside of \$25 million for leveraging incentive awards. The President released an additional \$160 million in emergency contingency funds in response to an extraordinary heat wave and a disastrously low salmon run in Alaska. Fiscal year 1998 funds were distributed approximately as follows:

- (1) \$965 million in block grants to the 50 states and the District of Columbia;
- (2) \$9 million in direct block grants to 128 Indian tribes and tribal organizations;
- (3) \$1.3 million in block grants to the Commonwealth of Puerto Rico, Virgin Islands, America Samoa, Guam, the Commonwealth of the Northern Mariana Islands, and the Trust Territory of the Pacific Islands/Palau; and
- (4) \$18.8 million in leveraging incentive awards to 39 states, 26 tribes and tribal organizations;

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

<sup>2</sup> The 1994 amendments provided that up to 25 percent of leveraging incentive funds may be set aside for the Residential Energy Assistance Challenge (REACH) program, which was funded for the first time in fiscal year 1996.

- (5) \$5.8 million in REACH awards to 7 states, \$400,000 to 6 Indian tribes and tribal organizations;
- (6) \$151 million in emergency contingency funds to 12 states and \$9 million to 33 Indian tribes and tribal organizations; and
- (7) \$0.3 million for training and technical assistance.

For fiscal year 1999, \$1.1 billion in advance funding was appropriated under P.L. 105-78, including the set aside of \$27.5 million for leveraging incentive awards. The President released an additional \$175.3 million in emergency contingency funds in response to an extraordinary heat wave and relief for energy-related damage caused by severe flooding in North Carolina. Fiscal year 1999 LIHEAP funds were distributed approximately as follows:

- (1) \$1.06 billion in block grants to the 50 states and the District of Columbia;
- (2) \$9.6 million in direct block grants to 130 Indian tribes and tribal organizations;
- (3) \$1.5 million in block grants to the Commonwealth of Puerto Rico, Virgin Islands, American Samoa, Guam, and the Commonwealth of the Northern Mariana Islands; and
- (4) \$20.6 million in leveraging incentive awards to 33 states, 23 tribes;
- (5) \$5.6 million in REACH awards to 5 states, \$681,000 to 6 Indian tribes and tribal organizations, \$124,000 to 1 insular area, and \$512,000 for states' second and third year REACH administrative costs;
- (6) \$174.6 million in emergency contingency funds to 26 states and \$699,000 to 18 Indian tribes and tribal organizations; and
- (7) \$0.3 million for training and technical assistance.

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

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

- (1) use funds only for the purposes of the statute;
- (2) make payments only to eligible low-income households;

- (3) conduct outreach activities;
- (4) coordinate LIHEAP activities with similar and related programs;
- (5) provide, in a timely manner, that the highest level of assistance will be furnished to those households with the lowest incomes and highest energy costs in relation to income, taking into account family size, except that the state may not differentiate between categorically eligible and income eligible households;
- (6) give consideration to agencies that have previously managed the program when designating local agencies to carry out the purposes of the program;
- (7) assure that energy suppliers receiving benefits directly on behalf of eligible households not treat assisted households adversely;
- (8) treat owners and renters equitably;
- (9) use not more than 10 percent of its allotment for planning and administration;
- (10) establish fiscal control and accounting procedures for proper disbursement of and accounting for federal funds, establish procedures for monitoring assistance provided, and prepare an annual audit;
- (11) permit and cooperate with federal investigations;
- (12) provide for public participation in the development of its plan;
- (13) provide an opportunity for a fair administrative hearing to individuals whose claims for assistance are denied or not acted on with reasonable promptness;
- (14) cooperate with HHS in collecting and reporting data under section 2610 of the statute;
- (15) provide outreach and intake through additional state and local government entities or community-based organizations under certain circumstances; and
- (16) use no more than 5 percent of funds to encourage and enable households to reduce their home energy needs.

### Eligibility

The unit of eligibility for energy assistance is the household, defined as any individual or group of individuals who are living together as one economic unit for which residential energy is customarily purchased in common, either directly or through rent. The Act limits payments to those households with incomes under the greater of 150 percent of the income guidelines or 60 percent of the state's median income; or to those households with members receiving benefits from the Temporary Assistance for Needy Families (TANF) program, SSI, food stamps, or need-tested veterans' benefits. No household may be

excluded from eligibility on the basis of income alone if household income is less than 110 percent of the poverty guidelines. States are permitted to set more restrictive criteria as well.

### **Payments**

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

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**CONTACT:** Leon Litow (202) 401-5304 for further information.

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

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

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

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

Year enacted	Coverage election or waiver if any	Category of worker
1984 .....	Elective by employer or by employer and employee	<p>Employees of nonprofit organizations placed under compulsory coverage; nonprofit organizations prohibited from terminating coverage of their employees on or after Mar. 31, 1983.</p> <p>States prohibited from terminating coverage of employees (after Apr. 20, 1983) and permitted to reinstate coverage for a terminated group.</p> <p>Rehired federal employees whose previous service was covered.</p> <p>Persons exercising reemployment rights to noncovered federal employment retain exemption after a period (not limited to 365 or fewer days) of military or national guard service or work for an international organization.</p> <p>Generally, all legislative branch employees except those who were participating on Dec. 31, 1983, and are also currently participating in the Civil Service Retirement System or another federal retirement system.</p> <p>Employees of nonprofit organizations who are also participating on a mandatory basis in the Civil Service Retirement System are treated like federal employees for Social Security tax and coverage purposes. They are therefore not covered unless hired on or after Jan. 1, 1984, or reemployed after a break in service of more than 365 days.</p>
1986 .....	Elective by employer	<p>Churches or church-related organizations may elect irrevocably to have services performed by their employees excluded from covered employment. Their employees are then treated as self-employed for Social Security purposes.</p> <p>State and local government employees hired after Mar. 31, 1986—Hospital Insurance (Part A) program only.</p>
1987 .....	Elective by individual	<p>Members of the clergy and of religious orders who filed an application for exemption from coverage may revoke the exemption if the revocation is filed before the due date of the individual's federal income tax return for the first taxable year beginning after Oct. 22, 1986.</p>
1990 .....		<p>Members of uniformed services reserve components on inactive duty training. Irregularly employed farm workers (if employer's annual expenditures for farm labor is at least \$2,500). Services performed in trade or business of spouse or by children aged 18 or older in trade or business of parent. For employers, the full amount of covered tips.</p>
1994 .....		<p>State and local government employees not under a state or local government retirement system. Exception: (1) students employed by the educational institution they attend and (2) election workers paid less than the mandated amount (\$100), unless either group covered under a State's Section 218 agreement.</p>
		<p>Threshold for exclusion of wages paid to election workers raised from \$100 to \$1,000 annually beginning Jan. 1, 1995, and will be indexed for wage increases each year after Dec. 31, 1999.</p> <p>Police and fire fighters under a public retirement system can be covered for Social Security in all states.</p> <p>Threshold for coverage of domestic employees' earnings raised from \$50 per calendar quarter to \$1,000 per calendar year per employer; amount subject to annual automatic adjustments. Domestic workers no longer covered for years in which they were under age 18, unless they are no longer in school and domestic employment is their principal occupation. Coverage of earnings of domestic workers on farms becomes subject to new annual threshold for domestic workers instead of annual threshold for agricultural employees.</p>

CONTACT: Greg Diez/Curt Pauzenga (410) 965-0153/7210 for further information.

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

Table 2.A2.—Noncontributory wage credits

Year enacted	Provision
1946 .....	Fully insured status and average monthly wage of \$160 for World War II veterans who died within 3 years after discharge.
1950 .....	Wage credits of \$160 per month of military service during World War II period (Sept. 16, 1940–July 24, 1947).
1952 .....	Same military wage credits to Dec. 31, 1953.
1953 .....	Same military wage credits to June 30, 1955.
1954 .....	Same military wage credits to Mar. 31, 1956.
1956 .....	Same military wage credits to Dec. 31, 1956.
1967 .....	For uniformed services, wage credits of \$100 for each \$100 (or fraction thereof) of basic pay not in excess of \$300 per calendar quarter, beginning in 1968.
1972 .....	For uniformed services, wage credits of \$300 per calendar quarter of service after 1956. (Supersedes 1967 provision.) For U.S. citizens of Japanese ancestry, wage credits for the period they were interned by the U.S. government during World War II period (Dec. 7, 1941–Dec. 31, 1946) and were aged 18 or older.
1977 .....	For uniformed services, wage credits of \$100 for each \$300 of basic pay up to maximum credit of \$1,200 per calendar year after 1977.

CONTACT: Greg Diez/Curt Pauzenga (410) 965-0153/7210 for further information.



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

Table 2.A3.—Annual maximum taxable earnings and actual contribution rates, 1937–2001 and thereafter

Year	Annual maximum taxable earnings		Contribution rate (percent)								
			Employer and employee, each				Self-employed person				
	OASDI	HI	Total	OASI	DI	HI	Total	OASI	DI	HI	
1937–49.....	\$3,000	...	1.0	1.0	...	...	...	...	...	...	...
1950.....	3,000	...	1.5	1.5	...	...	...	...	...	...	...
1951–53.....	3,600	...	1.5	1.5	...	...	...	...	...	...	...
1954.....	3,600	...	2.0	2.0	...	...	3.0	3.0	...	...	...
1955–56.....	4,200	...	2.0	2.0	...	...	3.0	3.0	...	...	...
1957–58.....	4,200	...	2.25	2.0	0.25	...	3.375	3.0	0.375	...	...
1959.....	4,800	...	2.5	2.25	.25	...	3.75	3.375	.375	...	...
1960–61.....	4,800	...	3.0	2.75	.25	...	4.5	4.125	.375	...	...
1962.....	4,800	...	3.125	2.875	.25	...	4.7	4.325	.375	...	...
1963–65.....	4,800	...	3.625	3.375	.25	...	5.4	5.025	.375	...	...
1966.....	6,600	\$6,600	4.2	3.5	.35	0.35	6.15	5.275	.525	0.35	0.35
1967.....	6,600	6,600	4.4	3.55	.35	.5	6.4	5.375	.525	.5	.5
1968.....	7,800	7,800	4.4	3.325	.475	.6	6.4	5.0875	.7125	.6	.6
1969.....	7,800	7,800	4.8	3.725	.475	.6	6.9	5.5875	.7125	.6	.6
1970.....	7,800	7,800	4.8	3.65	.55	.6	6.9	5.475	.825	.6	.6
1971.....	7,800	7,800	5.2	4.05	.55	.6	7.5	6.075	.825	.6	.6
1972.....	9,000	9,000	5.2	4.05	.55	.6	7.5	6.075	.825	.6	.6
1973.....	10,800	10,800	5.85	4.3	.55	1.0	8.0	6.205	.795	1.0	1.0
1974.....	13,200	13,200	5.85	4.375	.575	.9	7.9	6.185	.815	.9	.9
1975.....	114,100	114,100	5.85	4.375	.575	.9	7.9	6.185	.815	.9	.9
1976.....	115,300	115,300	5.85	4.375	.575	.9	7.9	6.185	.815	.9	.9
1977.....	116,500	116,500	5.85	4.375	.575	.9	7.9	6.185	.815	.9	.9
1978.....	117,700	117,700	6.05	4.275	.775	1.0	8.1	6.01	1.09	1.0	1.0
1979.....	22,900	22,900	6.13	4.33	.75	1.05	8.1	6.01	1.04	1.05	1.05
1980.....	25,900	25,900	6.13	4.52	.56	1.05	8.1	6.2725	.7775	1.05	1.05
1981.....	29,700	29,700	6.65	4.7	.65	1.3	9.3	7.025	.975	1.3	1.3
1982.....	132,400	132,400	6.7	4.575	.825	1.3	9.35	6.8125	1.2375	1.3	1.3
1983.....	135,700	135,700	6.7	4.775	.625	1.3	9.35	7.1125	.9375	1.3	1.3
1984.....	137,800	137,800	<sup>2</sup> 7.0	5.2	.5	1.3	<sup>2</sup> 14.0	10.4	1.0	2.6	2.6
1985.....	139,600	139,600	7.05	5.2	.5	1.35	<sup>2</sup> 14.1	10.4	1.0	2.7	2.7
1986.....	142,000	142,000	7.15	5.2	.5	1.45	<sup>2</sup> 14.3	10.4	1.0	2.9	2.9
1987.....	143,800	143,800	7.15	5.2	.5	1.45	<sup>2</sup> 14.3	10.4	1.0	2.9	2.9
1988.....	145,000	145,000	7.51	5.53	.53	1.45	<sup>2</sup> 15.02	11.06	1.06	2.9	2.9
1989.....	148,000	148,000	7.51	5.53	.53	1.45	<sup>2</sup> 15.02	11.06	1.06	2.9	2.9
1990.....	<sup>3</sup> 51,300	<sup>3</sup> 51,300	7.65	5.6	.6	1.45	15.3	11.2	1.2	2.9	2.9
1991.....	<sup>3</sup> 53,400	<sup>4</sup> 125,000	7.65	5.6	.6	1.45	15.3	11.2	1.2	2.9	2.9
1992.....	<sup>3</sup> 55,500	<sup>3</sup> 130,200	7.65	5.6	.6	1.45	15.3	11.2	1.2	2.9	2.9
1993.....	<sup>1</sup> 57,600	<sup>1</sup> 135,000	7.65	5.6	.6	1.45	15.3	11.2	1.2	2.9	2.9
1994.....	<sup>1</sup> 60,600	(5)	7.65	5.26	.94	1.45	15.3	10.52	1.88	2.9	2.9
1995.....	<sup>1</sup> 61,200	(5)	7.65	5.26	.94	1.45	15.3	10.52	1.88	2.9	2.9
1996.....	<sup>1</sup> 62,700	(5)	7.65	5.26	.94	1.45	15.3	10.52	1.88	2.9	2.9
1997.....	<sup>1</sup> 65,400	(5)	7.65	5.35	.85	1.45	15.3	10.7	1.7	2.9	2.9
1998.....	<sup>1</sup> 68,400	(5)	7.65	5.35	.85	1.45	15.3	10.7	1.7	2.9	2.9
1999.....	<sup>1</sup> 72,600	(5)	7.65	5.35	.85	1.45	15.3	10.7	1.7	2.9	2.9
2000.....	<sup>1</sup> 76,200	(5)	7.65	5.3	.9	1.45	15.3	10.6	1.8	2.9	2.9
2001.....	<sup>1</sup> 80,400	(5)	7.65	5.3	.9	1.45	15.3	10.6	1.8	2.9	2.9
Future schedule: 2002 and thereafter..	(1)	(5)	7.65	5.3	.9	1.45	15.3	10.6	1.8	2.9	2.9

<sup>1</sup> Based on automatic adjustment, under 1972 legislation (as modified by 1973 legislation), in proportion to increases in average wage level.

<sup>2</sup> Includes tax credit, see table 2.A5.

<sup>3</sup> Based on automatic adjustment, under 1972 legislation (as modified by 1973 legislation), using a transitional rule, specified by the Omnibus Budget Reconciliation Act (OBRA) of 1989, for computing a "deemed" average annual wage for 1988, 1989, and 1990.

<sup>4</sup> Based on 1990 legislation.

<sup>5</sup> Upper limit on earnings subject to HI taxes was repealed by OBRA 1993.

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

Table 2.A4.—Maximum annual amount of contribution, 1937–2001

Year	Employee					Self-employed person				
	Total OASDHI	Total OASDI	OASI	DI	HI	Total OASDHI	Total OASDI	OASI	DI	HI
1937–49.....	\$30.00	\$30.00	\$30.00	...	...	...	...	...	...	...
1950.....	45.00	45.00	45.00	...	...	...	...	...	...	...
1951–53.....	54.00	54.00	54.00	...	...	\$81.00	\$81.00	\$81.00	...	...
1954.....	72.00	72.00	72.00	...	...	108.00	108.00	108.00	...	...
1955–56.....	84.00	84.00	84.00	...	...	126.00	126.00	126.00	...	...
1957–58.....	94.50	94.50	84.00	\$10.50	...	141.75	141.75	126.00	\$15.75	...
1959.....	120.00	120.00	108.00	12.00	...	180.00	180.00	162.00	18.00	...
1960–61.....	144.00	144.00	132.00	12.00	...	216.00	216.00	198.00	18.00	...
1962.....	150.00	150.00	138.00	12.00	...	225.60	225.60	207.60	18.00	...
1963–65.....	174.00	174.00	162.00	12.00	...	259.20	259.20	241.20	18.00	...
1966.....	277.20	254.10	231.00	23.10	\$23.10	405.90	382.80	348.15	34.65	\$23.10
1967.....	290.40	257.40	234.30	23.10	33.00	422.40	389.40	354.75	34.65	33.00
1968.....	343.20	296.40	259.35	37.05	46.80	499.20	452.40	396.825	55.575	46.80
1969.....	374.40	327.60	290.55	37.05	46.80	538.20	491.40	435.825	55.575	46.80
1970.....	374.40	327.60	284.70	42.90	46.80	538.20	491.40	427.05	64.35	46.80
1971.....	405.60	358.80	315.90	42.90	46.80	585.00	538.20	473.85	64.35	46.80
1972.....	468.00	414.00	364.50	49.50	54.00	675.00	621.00	546.75	74.25	54.00
1973.....	631.80	523.80	464.40	59.40	108.00	864.00	756.00	670.14	85.86	108.00
1974.....	772.20	653.40	577.50	75.90	118.80	1,042.80	924.00	816.42	107.58	118.80
1975.....	824.85	697.95	616.875	81.075	126.90	1,113.90	987.00	872.085	114.915	126.90
1976.....	895.05	757.35	669.375	87.975	137.70	1,208.70	1,071.00	946.305	124.695	137.70
1977.....	965.25	816.75	721.875	94.875	148.50	1,303.50	1,155.00	1,020.525	134.475	148.50
1978.....	1,070.85	893.85	756.675	137.175	177.00	1,433.70	1,256.70	1,063.77	192.93	177.00
1979.....	1,403.77	1,163.32	991.59	171.75	240.45	1,854.90	1,614.45	1,376.29	238.16	240.45
1980.....	1,587.67	1,315.72	1,170.68	145.04	271.95	2,097.90	1,825.95	1,624.58	201.37	271.95
1981.....	1,975.05	1,588.95	1,395.90	193.05	386.10	2,762.10	2,376.00	2,086.43	289.57	386.10
1982.....	2,170.80	1,749.60	1,482.30	267.30	421.20	3,029.40	2,608.20	2,207.25	400.95	421.20
1983.....	2,391.90	1,927.80	1,704.675	223.125	464.10	3,337.95	2,873.85	2,539.1625	334.6875	464.10
1984 <sup>1</sup> .....	2,646.00	2,154.60	1,965.60	189.00	491.40	5,292.00	4,309.20	3,931.20	378.00	982.80
1985 <sup>1</sup> .....	2,791.80	2,257.20	2,059.20	198.00	534.60	5,583.60	4,514.40	4,118.40	396.00	1,069.20
1986 <sup>1</sup> .....	3,003.00	2,394.00	2,184.00	210.00	609.00	6,006.00	4,788.00	4,368.00	420.00	1,218.00
1987 <sup>1</sup> .....	3,131.70	2,496.60	2,277.60	219.00	635.10	6,263.40	4,993.20	4,555.20	438.00	1,270.20
1988 <sup>1</sup> .....	3,379.50	2,727.00	2,488.50	238.50	652.50	6,759.00	5,454.00	4,977.00	477.00	1,305.00
1989 <sup>1</sup> .....	3,604.80	2,908.80	2,654.40	254.40	696.00	7,209.60	5,817.60	5,308.80	508.80	1,392.00
1990.....	3,924.45	3,180.60	2,872.80	307.80	743.85	7,848.90	6,361.20	5,745.60	615.60	1,487.70
1991.....	5,123.30	3,310.80	2,990.40	320.40	1,812.50	10,246.60	6,621.60	5,980.80	640.80	3,625.00
1992.....	5,328.90	3,441.00	3,108.00	333.00	1,887.90	10,657.80	6,882.00	6,216.00	666.00	3,775.80
1993.....	5,528.70	3,571.20	3,225.60	345.60	1,957.50	11,057.40	7,142.40	6,451.20	691.20	3,915.00
1994.....	(2)	3,757.20	3,187.56	569.64	(2)	(2)	7,514.40	6,375.12	1,139.28	(2)
1995.....	(2)	3,794.40	3,219.12	575.28	(2)	(2)	7,588.80	6,438.24	1,150.56	(2)
1996.....	(2)	3,887.40	3,298.02	589.38	(2)	(2)	7,774.80	6,596.04	1,178.76	(2)
1997.....	(2)	4,054.80	3,498.90	555.90	(2)	(2)	8,109.60	6,997.80	1,111.80	(2)
1998.....	(2)	4,240.80	3,659.40	581.40	(2)	(2)	8,481.60	7,318.80	1,162.80	(2)
1999.....	(2)	4,501.20	3,884.10	617.10	(2)	(2)	9,002.40	7,768.20	1,234.20	(2)
2000.....	(2)	4,724.40	4,038.60	685.80	(2)	(2)	9,448.80	8,077.20	1,371.60	(2)
2001.....	(2)	4,984.80	4,261.20	723.60	(2)	(2)	9,969.60	8,522.40	1,447.20	(2)

<sup>1</sup> Includes tax credit, see table 2.A5.

<sup>2</sup> Upper limit on earnings subject to HI taxes was repealed by the Omnibus Budget Reconciliation Act (OBRA) of 1993.

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

**Table 2.A5.—Tax credits, 1983–1989 <sup>1</sup>**

Year enacted	Group	Tax payable under—	Percent of earnings	Tax credit, effective with respect to—
1983 .....	Employee	Federal Insurance Contributions Act (FICA)	0.3	Remuneration paid in calendar year 1984
	Self-employed	Self-Employment Contributions Act (SECA)	2.7 2.3 2.0	Self-employment income for taxable years beginning in 1984 Self-employment income for taxable years beginning in 1985 Self-employment income for taxable years beginning in 1986, 1987, 1988, and 1989

<sup>1</sup> During this period, scheduled taxes were credited to the Social Security trust funds, monies for tax credits were paid from the Treasury, and the reduced tax rates were paid by employees and the self-employed.

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

Year enacted	Type of transaction	Provision
1935 .....	Appropriations from general revenues	Annual appropriations to the old-age reserve account to provide payments; direct appropriation to pay for administrative expenses.
1939 .....		Trust fund created from which benefits and administrative expenses were to be paid.
1944 .....		General authorization to finance benefits and payments.
1947 .....		For cost of gratuitous military service wage credits.
1950 .....		General authorization repealed.
1951 .....		Railroad interchange provisions enacted.
1956 .....		For cost of gratuitous military service wage credits.
1966 .....		For cost of transitional uninsured monthly benefits for those aged 72 and older with fewer than 3 quarters of coverage.
1972 .....		For cost of gratuitous wage credits for Japanese-American internees.
1983 .....		A lump-sum payment to the OASDI trust funds equal to (1) the present value of the estimated additional benefits arising from the gratuitous military service wage credits for service before 1957 and (2) the amount of the combined employer-employee OASDI taxes on the gratuitous wage credits for service after 1956 and before 1984 but less any amounts previously transferred. After 1983, the trust funds will be reimbursed on a current basis for employer-employee taxes on such wage credits for service after 1983.
		A lump-sum payment to the OASDI trust funds representing the amount of uncashed benefit checks (including interest) issued in the past. In the future, the trust funds will be credited on a regular basis. All transfers made for uncashed benefit checks will be subject to the annual appropriation process.
		Transfers in each year from the Treasury Department to the OASDI trust funds amounts equal to income tax receipts attributable to inclusion of Social Security benefits in taxable income.
1993 .....		For tax credits for part of the 1984 employment FICA tax and part of the tax on self-employment income under SECA for 1984–89, see table 2.A5.
	Transfers in each year from the Treasury Department to the HI trust fund of amounts equal to income tax receipts attributable to the increased portions of Social Security benefits included in taxable income under the 1993 Act.	
1981 .....	Interfund borrowing	Interfund borrowing permitted among OASI, DI, and HI trust funds as needed until Dec. 31, 1982. For all or part of any loan to be repaid, the managing trustee determines if assets of borrowing trust fund(s) are sufficient for that purpose. Interest with respect to any outstanding loan balance at a rate equal to the rate earned by lending trust fund is transferred from time to time.
1983 .....		Interfund borrowing reauthorized among OASI, DI, and HI trust funds for calendar years 1983–87, with provisions for scheduled repayment, no later than Dec. 31, 1989, of principal and interest (including amounts borrowed in 1982). No borrowing permitted from any fund that has been reduced to specified levels.

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

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

Year enacted	Eligibility concept	Provision	
1939 .....	Quarter of coverage (QC)	Calendar quarter in which \$50 of wages is earned. Four QC are credited for covered earnings equal to maximum limitation for the year.	
1946 .....		Calendar quarter in which \$50 of wages is paid.	
1950 .....		Calendar quarter credited with \$100 of self-employment income (reported annually).	
1954 .....		Calendar quarter credited with \$100 of agricultural wages (reported annually).	
1977 .....		Calendar quarters of coverage (up to 4) for each \$250 of annual earnings, effective Jan. 1, 1978 (effective on Jan. 1 of each year, dollar amount subject to automatic increase).	
			<i>Amount</i> <span style="float: right;"><i>Year</i></span>
			\$260..... 1979
			290..... 1980
			310..... 1981
			340..... 1982
			370..... 1983
			390..... 1984
			410..... 1985
			440..... 1986
			460..... 1987
			470..... 1988
			500..... 1989
			520..... 1990
			540..... 1991
			570..... 1992
		590..... 1993	
		620..... 1994	
		630..... 1995	
		640..... 1996	
		670..... 1997	
		700..... 1998	
		740..... 1999	
		780..... 2000	
		830..... 2001	
1954 .....	Disability definition	Inability to engage in substantial gainful activity because of any medically determinable permanent physical or mental impairment.	
1965 .....		Disability lasting at least 12 months. For blind persons aged 55–64, inability to engage in usual occupation.	
1967 .....		Disability that precludes engagement in any substantial gainful work existing in the national economy. For surviving spouse, disability precludes any gainful activity.	
1990 .....		More restrictive definition for surviving spouse eliminated.	
1954 .....	Period of disability	Continuous period of at least 6 months as defined above or of blindness.	
1972 .....		At least 5 months of disability.	
1935 .....	Fully insured	Cumulative wages of \$2,000 and employment in each of 5 years after 1936 and before attainment of age 65.	
1939 .....		QC equal to one-half the quarters elapsed after 1936 (or quarter in which age 21 attained) and before quarter of death or attainment of age 65. Minimum 6 QC, maximum 40 QC.	
1950 .....		Elapsed period measured after 1950 (QC earned at any time are used).	
1954 .....		Period of disability excluded from elapsed period. Alternatively, QC earned in all quarters after 1954 and before quarter in which age 65 attained (minimum 6 QC).	
1956 .....		Elapsed period measured to age 62 for women. Alternatively, QC earned in all except 4 quarters after 1954 and before quarter in which age 65 attained (62 for women).	
1960 .....		QC reduced to 1/3 the elapsed quarters.	
1961 .....		QC equal to years elapsed after 1950 (or year age 21 attained) and before year of death or age 65 (62 for women).	
1972 .....		Elapsed period for men reaching age 62 after 1972, measured to age 62 or to 1975, if later.	
1983 .....		Any person aged 55 or older on Jan. 1, 1984, and employed by a nonprofit organization to whose employees coverage is extended solely by reason of the new compulsory coverage provision, will be deemed fully insured upon subsequently acquiring 6 QC if aged 60 or older on Jan. 1, 1984; 8 QC if aged 59; 12 QC if aged 58; 16 QC if aged 57; and 20 QC if aged 55 or 56.	

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

Year enacted	Eligibility concept	Provision
1939 .....	Currently insured	6 QC earned in 12 quarters before quarter of death.
1946 .....		6 QC earned in preceding 13 quarters, including quarter of death.
1950 .....		Including quarter of retirement added.
1954 .....		Including quarter of disablement added.
1954 .....	Disability insured	20 QC earned in last 40 quarters, including quarter of disablement, and currently insured.
1956 .....		Fully insured requirement added.
1958 .....		Currently insured requirement eliminated.
1960 .....		Alternatively, 20 QC earned before quarter of disablement (not necessarily in last 40 quarters) but QC earned in all quarters after 1950, with minimum of 6 QC.
1965 .....		Alternatively, for blind under age 31, QC earned in one-half the quarters elapsed after age 21, with minimum of 6 QC. For blind under age 24, 6 QC earned in preceding 12 quarters.
1967 .....		For all disabled under age 31, same alternative.
1972 .....		For blind, requirement for recent QC eliminated.
1983 .....		For those who become disabled again at age 31 or older and who were previously disabled before age 31, same alternative as that for those under age 31.
1965 .....	Transitionally insured	Same as fully insured, but minimum reduced to 3 QC.
1966 .....	Requirement for special age-72 monthly benefit	3 QC for each year elapsed after 1966 and before attainment of age 72. (No QC if aged 72 before 1968.)

CONTACT: Joseph Bondar/Curt Pauzenga (410) 965-0162/7210 for further information.

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

Table 2.A8.—Factors for indexing earnings, 1951–2001

Year	Annual maximum taxable earnings	Average annual wage <sup>1</sup>	Factors <sup>2</sup> for workers who were first eligible (attained age 62, became disabled, or died) in—						
			1988	1989	1990	1991	1992	1993	1994
1951	\$3,600	\$2,799.16	6.1882208	6.5828713	6.9070864	7.1805649	7.5122465	7.7921948	8.1936795
1952	3,600	2,973.32	5.8257503	6.1972845	6.5025090	6.7599687	7.0722223	7.3357728	7.7137409
1953	3,600	3,139.44	5.5174872	5.8693621	6.1584359	6.4022724	6.6980035	6.9476085	7.3055768
1954	3,600	3,155.64	5.4891623	5.8392307	6.1268205	6.3694053	6.6636182	6.9119418	7.2680724
1955	4,200	3,301.44	5.2467469	5.5813554	5.8562445	6.0881161	6.3693358	6.6066928	6.9470958
1956	4,200	3,532.36	4.9037527	5.2164870	5.4734059	5.6901194	5.9529550	6.1747953	6.4929452
1957	4,200	3,641.72	4.7564942	5.0598371	5.3090408	5.5192464	5.7741891	5.9893677	6.2979636
1958	4,200	3,673.80	4.7149600	5.0156541	5.2626817	5.4710518	5.7237683	5.9370679	6.2429691
1959	4,200	3,855.80	4.4924062	4.7789071	5.0142746	5.2128093	5.4535972	5.6568287	5.9482909
1960	4,800	4,007.12	4.3227605	4.5984423	4.8249216	5.0159591	5.2476542	5.4432111	5.7236669
1961	4,800	4,086.76	4.2385215	4.5088310	4.7308968	4.9182115	5.1453915	5.3371375	5.6121279
1962	4,800	4,291.40	4.0364030	4.2938225	4.5052990	4.6836813	4.9000280	5.0826304	5.3445076
1963	4,800	4,396.64	3.9397858	4.1910436	4.3974581	4.5715706	4.7827386	4.9609702	5.2165790
1964	4,800	4,576.32	3.7850981	4.0264907	4.2248007	4.3920770	4.5949540	4.7661877	5.0117605
1965	4,800	4,658.72	3.7181500	3.9552731	4.1500756	4.3143932	4.5136819	4.6818869	4.9231162
1966	6,600	4,938.36	3.5076058	3.7313015	3.9150730	4.0700860	4.2580897	4.4167699	4.6443394
1967	6,600	5,213.44	3.3225318	3.5344245	3.7084996	3.8553335	4.0334175	4.1837251	4.3992872
1968	7,800	5,571.76	3.1088597	3.3071256	3.4700059	3.6073969	3.7740283	3.9146697	4.1163690
1969	7,800	5,893.76	2.9390101	3.1264439	3.2804254	3.4103102	3.5678378	3.7007954	3.8914751
1970	7,800	6,186.24	2.8000563	2.9786284	3.1253298	3.2490738	3.3991536	3.5258251	3.7074895
1971	7,800	6,497.08	2.6660931	2.8361218	2.9758045	3.0936282	3.2365278	3.3571389	3.5301120
1972	9,000	7,133.80	2.4281337	2.5829866	2.7102021	2.8175096	2.9476548	3.0575009	3.2150355
1973	10,800	7,580.16	2.2851523	2.4308867	2.5506111	2.6515997	2.7740813	2.8774591	3.0257171
1974	13,200	8,030.76	2.1569341	2.2944914	2.4074982	2.5028204	2.6184296	2.7160070	2.8559464
1975	14,100	8,630.92	2.0069494	2.1349416	2.2400903	2.3287842	2.4363544	2.5271466	2.6573552
1976	15,300	9,226.48	1.8774029	1.9971333	2.0954947	2.1784635	2.2790902	2.3640218	2.4858256
1977	16,500	9,779.44	1.7712487	1.8842091	1.9770089	2.0552864	2.1502233	2.2303527	2.3452693
1978	17,700	10,556.03	1.6409408	1.7455909	1.8315636	1.9040823	1.9920349	2.0662692	2.1727316
1979	22,900	11,479.46	1.5089403	1.6051722	1.6842290	1.7509142	1.8317917	1.9000545	1.9979529
1980	25,900	12,513.46	1.3842550	1.4725352	1.5450595	1.6062344	1.6804289	1.7430511	1.8328600
1981	29,700	13,773.10	1.2576559	1.3378622	1.4037537	1.4593338	1.5267427	1.5836377	1.6652330
1982	32,400	14,531.34	1.1920318	1.2680530	1.3305063	1.3831863	1.4470778	1.5010040	1.5783417
1983	35,700	15,239.24	1.1366590	1.2091489	1.2687011	1.3189339	1.3798575	1.4312787	1.5050239
1984	37,800	16,135.07	1.0735510	1.1420161	1.1982619	1.2457058	1.3032469	1.3518132	1.4214639
1985	39,600	16,822.51	1.0296811	1.0953484	1.1492958	1.1948009	1.2499906	1.2965723	1.3633768
1986	42,000	17,321.82	1.0000000	1.0637745	1.1161668	1.1603602	1.2139590	1.2591979	1.3240768
1987	43,800	18,426.51	1.0000000	1.0000000	1.0492513	1.0907953	1.1411808	1.1837076	1.2446969
1988	45,000	19,334.04	1.0000000	1.0000000	1.0000000	1.0395939	1.0876144	1.1281450	1.1862715
1989	48,000	20,099.55	1.0000000	1.0000000	1.0000000	1.0000000	1.0461916	1.0851785	1.1410912
1990	51,300	21,027.98	1.0000000	1.0000000	1.0000000	1.0000000	1.0000000	1.0372656	1.0907096
1991	53,400	21,811.60	1.0000000	1.0000000	1.0000000	1.0000000	1.0000000	1.0000000	1.0515240
1992	55,500	22,935.42	1.0000000	1.0000000	1.0000000	1.0000000	1.0000000	1.0000000	1.0000000
1993	57,600	23,132.67	1.0000000	1.0000000	1.0000000	1.0000000	1.0000000	1.0000000	1.0000000
1994	60,600	23,753.53	1.0000000	1.0000000	1.0000000	1.0000000	1.0000000	1.0000000	1.0000000
1995	61,200	24,705.66	1.0000000	1.0000000	1.0000000	1.0000000	1.0000000	1.0000000	1.0000000
1996	62,700	25,913.90	1.0000000	1.0000000	1.0000000	1.0000000	1.0000000	1.0000000	1.0000000
1997	65,400	27,426.00	1.0000000	1.0000000	1.0000000	1.0000000	1.0000000	1.0000000	1.0000000
1998	68,400	28,861.44	1.0000000	1.0000000	1.0000000	1.0000000	1.0000000	1.0000000	1.0000000
1999	72,600	30,469.84	1.0000000	1.0000000	1.0000000	1.0000000	1.0000000	1.0000000	1.0000000
2000	76,200	...	1.0000000	1.0000000	1.0000000	1.0000000	1.0000000	1.0000000	1.0000000
2001	80,400	...	1.0000000	1.0000000	1.0000000	1.0000000	1.0000000	1.0000000	1.0000000

See footnotes at end of table.







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

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

Year enacted	Earnings measure	Provision	
1939 .....	AMW	Computed using creditable earnings after 1936 and before year of death or retirement, divided by months after 1936 and before quarter of death or retirement, excluding months before age 22 in quarters not QC.	
1950 .....		Alternatively, computed using creditable earnings after 1950 (or year aged 21, if later) and before year of death, year of retirement or subsequent year, or year age 65 attained if then insured, divided by number of months in those years.	
1954 .....		Earnings and months in 4 years may be excluded in all cases, 5 years if worker has 20 QC. Period of disability may be excluded.	
1956 .....		Earnings and months in 5 years may be excluded in all cases. Computation period may end at age 62 for women then insured.	
1960 .....		Earnings may be used for any year after 1950 and before year of retirement but including year of death with the number of years equal to the years elapsed after 1955 (or year age 26 attained) and before year of death or age 65 attained (62 for women).  Same method may be used for earnings after 1936 and year elapsed after 1941.	
1972 .....		Number of years for men reaching age 62 after 1972, measured to age 62 or to 1975, if later.	
1977 .....		For workers who attain age 62, become disabled, or die after 1978, excludes earnings in year of attainment of age 62 and later, computed using creditable earnings after 1936.  For workers who attain age 62 after 1978 and before 1984, excludes earnings in year of attainment of age 62 and later, computed using creditable earnings after 1950.	
1977 .....		AIME	For workers who attain age 62, become disabled, or die after 1978, AIME is computed by using indexed earnings after 1950 for the same computation period applicable in calculating the AMW. Indexed earnings for a given year equal actual creditable earnings multiplied by the national average wage for the second year before worker attains age 62, becomes disabled, or dies, divided by the national average wage for the given year, except that for years after the second year before the worker attains age 62, becomes disabled, or dies, indexed earnings equal actual creditable earnings.
1980 .....			For disabled workers, the number of years of earnings used equals the number of years elapsed after 1950 (or year age 21 attained, if later) and before year of disability, minus dropout years equal to one-fifth of the number of elapsed years rounded to the next lower integer (to a maximum of 5 dropout years). However, the number of years of earnings used is at least 2. <i>Effective for initial entitlement after June 1980.</i>  Disabled workers who receive less than 3 dropout years under the one-fifth rule may be credited with additional dropout years based on child care, up to a total of 3 dropout years. (To receive this credit, a worker must have had no earnings in that year and have been living with a child under age 3.) However, the number of years of earnings used is at least 2. <i>Effective for July 1981.</i>
1983 .....			For workers who die after 1978 but before attaining age 62, indexed earnings for a given year equal actual creditable earnings, multiplied by the national average wage for the earlier of (1) the year in which the worker reached or would have reached age 60 or (2) the second year before the survivor becomes eligible for aged or disabled widow(er) benefits, and then divided by the national average wage for the given year. This computation method applies only if it results in a higher benefit. <i>Effective for surviving spouses newly eligible after 1984.</i>

CONTACT: Joseph Bondar/Curt Pauzenga (410) 965-0162/7210 for further information.

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

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

Year enacted	Year of first eligibility	Percentage of AIME applicable to PIA			First applicable cost-of-living adjustment		Minimum PIA based on indexed earnings
		90 percent of first—	Plus 32 percent of next—	Plus 15 percent above—	Effective for—	Percentage increase	
1977 <sup>1</sup>	2 1979	\$180	\$905	\$1,085	June 1979	9.9	<sup>3</sup> \$122
	2 1980	194	977	1,171	1980	14.3	<sup>3</sup> 122
1981 <sup>4</sup>	2 1981	211	1,063	1,274	1981	11.2	<sup>3</sup> 122
	2 1982	230	1,158	1,388	1982	7.4	(4)
1983	2 1983	254	1,274	1,528	Dec. 1983	3.5	(4)
	1984	267	1,345	1,612	1984	3.5	(4)
	1985	280	1,411	1,691	1985	3.1	(4)
	1986	297	1,493	1,790	1986	1.3	(4)
	1987	310	1,556	1,866	1987	4.2	(4)
	1988	319	1,603	1,922	1988	4.0	(4)
	1989	339	1,705	2,044	1989	4.7	(4)
	1990	356	1,789	2,145	1990	5.4	(4)
	1991	370	1,860	2,230	1991	3.7	(4)
	1992	387	1,946	2,333	1992	3.0	(4)
	1993	401	2,019	2,420	1993	2.6	(4)
	1994	422	2,123	2,545	1994	2.8	(4)
	1995	426	2,141	2,567	1995	2.6	(4)
	1996	437	2,198	2,635	1996	2.9	(4)
	1997	455	2,286	2,741	1997	2.1	(4)
	1998	477	2,398	2,875	1998	1.3	(4)
	1999	505	2,538	3,043	1999	<sup>5</sup> 2.4	(4)
	2000	531	2,671	3,202	2000	3.5	(4)
	2001	561	2,820	3,381	2001	...	(4)

<sup>1</sup> The 1977 amendments provided for annual automatic adjustments of bend points (AIME brackets) in benefit formula in proportion to increases in average wage level. As a result, separate formulas are applicable to workers who were first eligible (attained age 62, became disabled, or died) in successive calendar years. The legislation also "froze" the minimum PIA at \$122.

<sup>2</sup> For workers who attained age 62 in the 1979–1983 period, PIA cannot be less than that derived from PIA table in effect in December 1978 (approximated by PIA formula in table 2.A16) based on provisions in effect before 1979 but excluding earnings after year aged 61 in computations of AMW, and including any general benefit increase after year aged 61.

<sup>3</sup> Not subject to automatic adjustments until earlier of year of attainment of age 65 or year of first receipt of benefits.

<sup>4</sup> Minimum PIA eliminated by 1981 legislation for workers who attain age 62 or die after 1981 (after 1991 for members of certain religious orders). August 1981 legislation would have eliminated the minimum PIA effective March 1982 for workers who attained age 62 before November 1981 or who died (before attaining age 62) before March 1982; for all others, the minimum would have been eliminated effective November 1981. This legislation was superseded by December 1981 legislation that restored the minimum PIA for workers who attained age 62 or died (before attaining age 62) before 1982.

<sup>5</sup> The December 1999 cost-of-living adjustment (COLA) was originally determined to be 2.4 percent, based on the consumer price index (CPI). The underlying CPI was later recomputed by the Bureau of Labor Statistics; a 2.5 percent COLA would have been consistent with the recomputed CPI. Pursuant to P.L. 106–554, benefits will be calculated and paid in August 2001 and later as if the December 1999 COLA had been 2.5 percent. Affected beneficiaries will receive a one-time payment to cover the shortfall that occurred before August 2001.

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

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

Year enacted	Effective	Provision																								
1983 .....	1986	<p>Workers first eligible for pensions based on noncovered employment<sup>1</sup> and disability or retired workers after Dec. 31, 1985. The benefit computation formula uses a reduced factor of the usual first AIME bendpoint.</p> <table style="margin-left: auto; margin-right: auto;"> <thead> <tr> <th style="text-align: left;"><i>Factor</i></th> <th style="text-align: left;"><i>Year eligible</i></th> </tr> </thead> <tbody> <tr><td>80%</td><td>1986</td></tr> <tr><td>70%</td><td>1987</td></tr> <tr><td>60%</td><td>1988</td></tr> <tr><td>50%</td><td>1989</td></tr> <tr><td>40%</td><td>1990 and later</td></tr> </tbody> </table> <p>WEP is not applicable to persons who were federal employees or nonprofit employees on Jan. 1, 1984 and who were covered by Social Security on that date; to federal employees who switched to the Federal Employees Retirement System (FERS) during a special enrollment period and who have worked under FERS for 5 years; to persons with Railroad Retirement pensions; or to workers with 30 years of substantial Social Security earnings. Workers with 26–29 years of coverage have less than full WEP applied.<sup>2</sup> For benefits payable before January 1989:</p> <table style="margin-left: auto; margin-right: auto;"> <thead> <tr> <th style="text-align: left;"><i>Factor</i></th> <th style="text-align: left;"><i>Years of coverage</i></th> </tr> </thead> <tbody> <tr><td>80%</td><td>29</td></tr> <tr><td>70%</td><td>28</td></tr> <tr><td>60%</td><td>27</td></tr> <tr><td>50%</td><td>26</td></tr> </tbody> </table>	<i>Factor</i>	<i>Year eligible</i>	80%	1986	70%	1987	60%	1988	50%	1989	40%	1990 and later	<i>Factor</i>	<i>Years of coverage</i>	80%	29	70%	28	60%	27	50%	26		
<i>Factor</i>	<i>Year eligible</i>																									
80%	1986																									
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80%	29																									
70%	28																									
60%	27																									
50%	26																									
1988 .....	1989	<p>5% added to factor for each year of coverage over 20.</p> <table style="margin-left: auto; margin-right: auto;"> <thead> <tr> <th style="text-align: left;"><i>Factor</i></th> <th style="text-align: left;"><i>Years of coverage</i></th> </tr> </thead> <tbody> <tr><td>85%</td><td>29</td></tr> <tr><td>80%</td><td>28</td></tr> <tr><td>75%</td><td>27</td></tr> <tr><td>70%</td><td>26</td></tr> <tr><td>65%</td><td>25</td></tr> <tr><td>60%</td><td>24</td></tr> <tr><td>55%</td><td>23</td></tr> <tr><td>40%</td><td>22</td></tr> <tr><td>45%</td><td>21</td></tr> </tbody> </table>	<i>Factor</i>	<i>Years of coverage</i>	85%	29	80%	28	75%	27	70%	26	65%	25	60%	24	55%	23	40%	22	45%	21				
<i>Factor</i>	<i>Years of coverage</i>																									
85%	29																									
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40%	22																									
45%	21																									
	1991	<p>Earnings required for a year of substantial coverage (decoupled from the definition of a year of coverage for special minimum PIA).<sup>2</sup></p> <table style="margin-left: auto; margin-right: auto;"> <thead> <tr> <th style="text-align: left;"><i>Year</i></th> <th style="text-align: left;"><i>Earnings</i></th> </tr> </thead> <tbody> <tr><td>1991</td><td>\$9,900</td></tr> <tr><td>1992</td><td>10,350</td></tr> <tr><td>1993</td><td>10,725</td></tr> <tr><td>1994</td><td>11,250</td></tr> <tr><td>1995</td><td>11,325</td></tr> <tr><td>1996</td><td>11,625</td></tr> <tr><td>1997</td><td>12,150</td></tr> <tr><td>1998</td><td>12,675</td></tr> <tr><td>1999</td><td>13,425</td></tr> <tr><td>2000</td><td>14,175</td></tr> <tr><td>2001</td><td>14,925</td></tr> </tbody> </table>	<i>Year</i>	<i>Earnings</i>	1991	\$9,900	1992	10,350	1993	10,725	1994	11,250	1995	11,325	1996	11,625	1997	12,150	1998	12,675	1999	13,425	2000	14,175	2001	14,925
<i>Year</i>	<i>Earnings</i>																									
1991	\$9,900																									
1992	10,350																									
1993	10,725																									
1994	11,250																									
1995	11,325																									
1996	11,625																									
1997	12,150																									
1998	12,675																									
1999	13,425																									
2000	14,175																									
2001	14,925																									

<sup>1</sup> Reduction in PIA will not be greater than one-half of the periodic payment based on noncovered employment performed after 1956.

<sup>2</sup> See table 2.A12. Before 1991, a year of substantial coverage for WEP was the same amount as for the minimum PIA (25 percent of the “old law” contribution and benefit base). For 1991 and following, a year of substantial coverage under WEP provisions remains 25 percent of the old law base, while the criterion for computing the special minimum PIA was changed to 15 percent of the base.

**2.A OASDI: Benefit Computation & Automatic Adjustments**

Table 2.A12.—Special minimum PIA <sup>1</sup> (formula applies to years of coverage)

Year enacted	Years of coverage		PIA computation		
	Applicable period	Number	Amount <sup>2</sup> per year of coverage over 10 years	Maximum amount <sup>2</sup> for workers with 30 or more years of coverage	Effective for—
1972 .....	1937–1950	The number (disregarding any remainder and not exceeding 14) obtained by dividing total creditable wages in 1937–1950 by \$900	\$8.50	\$170.00	January 1973
	After 1950	Number of years with creditable earnings equal to at least 25% of the effective annual maximum taxable earnings, that is:			
		1951–1954 .....	\$900		
		1955–1958 .....	1,050		
		1959–1965 .....	1,200		
		1966–1967 .....	1,650		
		1968–1971 .....	1,950		
		1972 .....	2,250		
		1973 .....	2,700		
		1974 .....	3,300		
		1975 .....	3,525		
		1976 .....	3,825		
		1977 .....	4,125		
		1978 .....	4,425		
1973 .....	.....	.....	9.00	180.00	March 1974
1977 <sup>3</sup> .....	After 1978	Number of years with creditable earnings equal to at least 25% of what the annual taxable maximum would have been if the statutory increases in the maximum under the 1977 amendments had not been enacted (the "old law" contribution and benefit base), that is:	11.50	230.00	January 1979
		1979 .....	\$4,725		
		1980 .....	5,100		
		1981 .....	5,500		
		1982 .....	6,075		
		1983 .....	6,675		
		1984 .....	7,050		
		1985 .....	7,425		
		1986 .....	7,875		
		1987 .....	8,175		
		1988 .....	8,400		
		1989 .....	8,925		
		1990 .....	9,525		
			<sup>4</sup> 12.64	252.80	June 1979
			<sup>4</sup> 14.45	289.00	June 1980
			<sup>4</sup> 16.07	321.40	June 1981
			<sup>4</sup> 17.26	345.10	June 1982
			<sup>4</sup> 17.86	357.10	December 1983
			<sup>4</sup> 18.49	369.50	December 1984
			<sup>4</sup> 19.06	380.90	December 1985
			<sup>4</sup> 19.31	385.80	December 1986
			<sup>4</sup> 20.12	402.00	December 1987
			<sup>4</sup> 20.92	418.00	December 1988
			<sup>4</sup> 21.90	437.60	December 1989
			<sup>4</sup> 23.08	461.20	December 1990
			<sup>4</sup> 23.93	478.20	December 1991
			<sup>4</sup> 24.65	492.50	December 1992
			<sup>4</sup> 25.29	505.30	December 1993
			<sup>4</sup> 26.00	519.40	December 1994
			<sup>4</sup> 26.68	532.90	December 1995
			<sup>4</sup> 27.45	548.30	December 1996
			<sup>4</sup> 28.03	559.80	December 1997
			<sup>4</sup> 28.39	567.00	December 1998
			<sup>4</sup> 29.07	<sup>5</sup> 580.60	December 1999
			<sup>4</sup> 30.09	<sup>5</sup> 600.90	December 2000

See footnotes at end of table.

**2.A OASDI: Benefit Computation & Automatic Adjustments**

Table 2.A12.—Special minimum PIA <sup>1</sup> (formula applies to years of coverage)—*Continued*

Year enacted	Years of coverage		PIA computation		
	Applicable period	Number	Amount <sup>2</sup> per year of coverage over 10 years	Maximum amount <sup>2</sup> for workers with 30 or more years of coverage	Effective for—
1990 .....	After 1990	Number of years with creditable earnings equal to at least 25% of what the annual taxable maximum would have been if the statutory increases in the maximum under the 1977 amendments had not been enacted <sup>6</sup> (the "old law" contribution and benefit base), that is:	...	...	...
		1991 .....		\$5,940	
		1992 .....		6,210	
		1993 .....		6,435	
		1994 .....		6,750	
		1995 .....		6,795	
		1996 .....		6,975	
		1997 .....		7,290	
		1998 .....		7,605	
		1999 .....		8,055	
		2000 .....		8,505	
		2001 .....		8,955	

<sup>1</sup> Alternative PIA applicable when it exceeds the regularly computed PIA. The usual rates of actuarial reduction apply for retirement before age 65. No delayed retirement credits are applicable to the benefit derived from the special minimum PIA. However, the resulting retirement benefit will be raised if necessary to equal the benefit derived from the regularly computed PIA plus any delayed retirement credits.

<sup>2</sup> The amount effective for a given month applies, as of that month, to all workers from the date of entitlement to benefits.

<sup>3</sup> Provision for future automatic cost-of-living increases of amount per year of coverage (and maximum amount), beginning with the June 1979 increase.

<sup>4</sup> Factors were obtained by applying cost-of-living increases to initial 1979 factor of \$11.50 and rounding each one to nearest cent. An approximate PIA may be computed by multiplying factor in year of entitlement by the number of years of coverage in excess of 10 with a maximum of 20. Actual PIA's are published yearly in the *Federal Register*.

<sup>5</sup> The December 1999 cost-of-living adjustment (COLA) was originally determined to be 2.4%, based on the Consumer Price Index (CPI). The underlying CPI was later recomputed by the Bureau of Labor Statistics; a 2.5% COLA would have been consistent with the recomputed CPI. Pursuant to P.L. 106-554, benefits will be calculated and paid in August 2001 and later as if the December 1999 COLA had been 2.5%. Affected beneficiaries will receive a one-time payment to cover the shortfall that occurred before August 2001. The recomputed special minimum PIA for 1999 and 2000 are \$581.10 and \$601.40, respectively.

<sup>6</sup> For 1991, and following, a year of substantial coverage under the Windfall Elimination Provision remains 25% of the old law base, while the criterion for the special minimum PIA was changed to 15% of the base.

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

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

Year enacted	Year of first eligibility	Percentage of PIA applicable to maximum family benefit				First applicable cost-of-living adjustment	
		150 percent of first—	Plus 272 percent of next—	Plus 134 percent of next—	Plus 175 percent above—	Effective for—	Percentage increase
1977 <sup>1</sup>	1979	\$230	\$102	\$101	\$433	June 1979	9.9
	1980	248	110	109	467	1980	14.3
	1981	270	120	118	508	1981	11.2
	1982	294	131	129	554	1982	7.4
	1983	324	144	142	610	Dec. 1983	3.5
	1984	342	151	150	643	1984	3.5
	1985	358	159	158	675	1985	3.1
	1986	379	169	166	714	1986	1.3
	1987	396	175	174	745	1987	4.2
	1988	407	181	179	767	1988	4.0
	1989	433	193	190	816	1989	4.7
	1990	455	201	200	856	1990	5.4
	1991	473	209	208	890	1991	3.7
	1992	495	219	217	931	1992	3.0
	1993	513	227	226	966	1993	2.6
	1994	539	240	237	1,016	1994	2.8
	1995	544	241	239	1,024	1995	2.6
	1996	559	247	246	1,052	1996	2.9
	1997	581	258	255	1,094	1997	2.1
	1998	609	271	267	1,147	1998	1.3
	1999	645	286	283	1,214	1999	<sup>2</sup> 2.4
2000	679	301	298	1,278	2000	3.5	
2001	717	317	315	1,349	2001	...	

<sup>1</sup> The 1977 amendments provided for annual automatic adjustments of bend points (PIA brackets) in maximum family benefit formula in proportion to increases in average wage level. As a result, separate formulas are applicable to workers first eligible in successive calendar years.

<sup>2</sup> The December 1999 cost-of-living adjustment (COLA) was originally determined to be 2.4 percent, based on the consumer price index (CPI). The underlying CPI was later recomputed by the Bureau of Labor Statistics; a 2.5 percent COLA would have been consistent with the recomputed CPI. Pursuant to P.L. 106-554, benefits will be calculated and paid in August 2001 and later as if the December 1999 COLA had been 2.5 percent. Affected beneficiaries will receive a one-time payment to cover the shortfall that occurred before August 2001.

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

Year enacted	Year of first eligibility	Formula for maximum family benefit
1977 <sup>1</sup>	1979 <sup>2</sup>	150% of first \$230 of PIA + 272% of next \$102 of PIA + 134% of next \$101 of PIA + 175% of PIA over \$433 <sup>3</sup>
	1980 <sup>2</sup>	150% of first \$248 of PIA + 272% of next \$110 of PIA + 134% of next \$109 of PIA + 175% of PIA over \$467 <sup>3</sup>
1980 <sup>4</sup>	1979 or later	Smaller of (1) 85% of the AIME (or 100% of PIA, if larger) and (2) 150% of PIA <sup>5</sup>

<sup>1</sup> The 1977 amendments provided for annual automatic adjustments of bend points (PIA brackets) in maximum family benefit formula in proportion to increases in average wage level. As a result, separate formulas are applicable to workers first eligible in successive calendar years.

<sup>2</sup> Applicability of formula limited to workers with initial entitlement before July 1980, as a result of 1980 amendments.

<sup>3</sup> Calculated amount subject to cost-of-living adjustments beginning with the one effective for June of the year of first eligibility.

<sup>4</sup> Formula for computing maximum family benefit revised effective for workers with initial entitlement in or after July 1980. New formula remains unchanged for workers eligible in successive calendar years because it has no bend points requiring adjustments.

<sup>5</sup> Calculated amount subject to cost-of-living adjustments beginning with the one effective in year of first eligibility (or in 1981, if later).

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

Table 2.A15.—Formulas for computing PIA<sup>1</sup> from creditable earnings after 1936

Year enacted	Formula	Special provisions	Limited to—	Effective for—
Formula applied to cumulative wages after 1936:				
1935 .....	1/2 of 1% of first \$3,000 of wages plus 1/12 of 1% of next \$42,000 of wages plus 1/24 of 1% of next \$84,000 of wages	...	...	January 1942, but never applicable; superseded by new formula under 1939 Act.
Formula applied to AMW based on earnings after 1936:				
1939 .....	40% of first \$50 of AMW plus 10% of next \$200 of AMW	Sum increased by 1% for each increment year—year with at least \$200 of creditable wages—to obtain primary insurance benefit (PIB).	...	January 1940
1950 .....	...	Number of increment years limited to 14 for years before 1951. Conversion table in the law, reflecting 1950 benefit increase, introduced for determining PIA from PIB.	...	September 1950
1960 .....	...	...	Workers with at least 1 QC before 1951 and, if age 22 attained after 1950, with fewer than 6 QC after 1950.	Applications for benefits and recomputations filed after 1960.
1967 .....	...	1967 simplified old-start formula: Total creditable wages for 1937–1950 distributed over 9–14 years, with 14 increment years assumed.	Workers with at least 1 QC before 1951 who attained age 21 before 1937 or attained age 21 after 1950 but with fewer than 6 QC. <sup>2</sup>	Applications for benefits and recomputations filed after Jan. 2, 1968.
1977 .....	...	1977 simplified old-start formula: Total creditable wages for 1937–1950 distributed over 1–14 years. Number of increment years equal to total 1937–1950 wages, divided by \$1,650, with 4–14 increment years credited.	Workers with at least 1 QC before 1951 who either attained age 22 after 1936 and before 1950 or attained age 22 after 1950, but have fewer than 6 QC after 1950. <sup>3</sup>	Workers first eligible after 1977.
1990 .....	...	...	Applicability of pre-1977 formulas terminated. 1977 old-start formula expanded to apply to all workers with pre-1951 earnings.	Persons becoming newly entitled after May 1992.

<sup>1</sup> Old-age benefit under 1935 Act and a primary insurance benefit (PIB) under 1939 Act. Effective for September 1950, the PIB became an intermediate step in benefit computations based on creditable earnings after 1936; a conversion table was introduced into the law for determining the PIA from the PIB. Each time a benefit increase becomes effective (see table 2.A16 for benefit increases since 1950), a new conversion table incorporating the increase takes effect.

<sup>2</sup> Under this computation method, a period of disability that began before 1951 is not taken into account. Earlier provisions remained in effect for workers who attained age 21 after 1936 and before 1951 or for whom consideration of a period of disability that began before 1951 resulted in a higher PIA.

<sup>3</sup> Under this computation method, a period of disability that began before 1951 is not taken into account. The 1967 simplified old-start method remained in effect for workers with first eligibility before 1978. The pre-1967 old-start formula remained in effect only for workers, irrespective of date of first eligibility, for whom consideration of a period of disability that began before 1951 resulted in a higher PIA.

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

Table 2.A16.—Formulas for computing PIA from AMW based on earnings after 1950, and percentage increases in PIA

Effective for .....	Apr. 1952	Sept. 1952	Sept. 1954	Jan. 1959	Jan. 1965	Feb. 1968	Jan. 1970	Jan. 1971	Sept. 1972
Percentage increase in PIA .....	<sup>1</sup> 77.0	<sup>2</sup> 12.5	<sup>3</sup> 13.0	<sup>4</sup> 7.0	<sup>5</sup> 7.0	13.0	15.0	10.0	20.0
AMW	Percentage of AMW applicable to PIA								
First \$110 .....	<sup>6</sup> 50.00	<sup>6</sup> 55.00	55.00	58.85	62.97	71.16	81.83	90.01	108.01
Next 290 .....	<sup>7</sup> 15.00	<sup>7</sup> 15.00	<sup>8</sup> 20.00	21.40	22.90	25.88	29.76	32.74	39.29
Next 150 .....	...	...	...	...	21.40	24.18	27.81	30.59	36.71
Next 100 .....	...	...	...	...	...	28.43	32.69	35.96	43.15
Next 100 .....	...	...	...	...	...	...	...	20.00	24.00
Next 250 .....	...	...	...	...	...	...	...	...	<sup>9</sup> 20.00
Effective for .....	June 1974	June 1975	June 1976	June 1977	June 1978	June 1979	June 1980	June 1981	June 1982
Percentage increase in PIA .....	<sup>10</sup> 11.0	<sup>11</sup> 8.0	6.4	5.9	6.5	9.9	14.3	11.2	7.4
AMW	Percentage of AMW applicable to PIA								
First \$110 .....	119.89	129.48	137.77	145.90	155.38	170.76	195.18	217.04	233.10
Next 290 .....	43.61	47.10	50.10	53.06	56.51	62.10	70.98	78.93	84.77
Next 150 .....	40.75	44.01	46.82	49.58	52.81	58.04	66.34	73.77	79.23
Next 100 .....	47.90	51.73	55.05	58.30	62.09	68.24	78.00	86.74	93.16
Next 100 .....	26.64	28.77	30.61	32.42	34.53	37.95	43.38	48.24	51.81
Next 250 .....	22.20	23.98	25.51	27.02	28.78	31.63	36.15	40.20	43.17
Next 175 .....	<sup>12</sup> 20.00	21.60	22.98	24.34	25.92	28.49	32.56	36.21	38.89
Next 100 .....	...	20.00	21.28	22.54	24.01	26.39	30.16	33.54	36.02
Next 100 .....	...	...	20.00	21.18	22.56	24.79	28.33	31.50	33.83
Next 100 .....	...	...	...	20.00	21.30	23.41	26.76	29.76	31.96
Next 435 .....	...	...	...	...	20.00	21.98	25.12	27.93	30.00
Next 250 .....	...	...	...	...	...	20.00	22.86	25.42	27.30
Next 315 .....	...	...	...	...	...	...	20.00	22.24	23.89
Next 225 .....	...	...	...	...	...	...	...	20.00	21.48
Next 275 .....	...	...	...	...	...	...	...	...	20.00
Effective for .....	Dec. 1983	Dec. 1984	Dec. 1985	Dec. 1986	Dec. 1987	Dec. 1988	Dec. 1989	Dec. 1990	Dec. 1991
Percentage increase in PIA .....	3.5	3.5	3.1	1.3	4.2	4.0	4.7	5.4	3.7
AMW	Percentage of AMW applicable to PIA								
First \$110 .....	241.26	249.70	257.44	260.79	271.74	282.61	295.89	311.87	323.41
Next 290 .....	87.74	90.81	93.62	94.84	98.82	102.77	107.60	113.42	117.62
Next 150 .....	82.00	84.87	87.50	88.64	92.36	96.05	100.56	105.99	109.91
Next 100 .....	96.42	99.79	102.88	104.22	108.60	112.94	118.25	124.64	129.25
Next 100 .....	53.62	55.50	57.22	57.96	60.39	62.81	65.76	69.31	71.87
Next 250 .....	44.68	46.24	47.67	48.29	50.32	52.33	54.79	57.75	59.89
Next 175 .....	40.25	41.66	42.95	43.51	45.34	47.15	49.37	52.04	53.97
Next 100 .....	37.28	38.58	39.78	40.30	41.99	43.67	45.72	48.19	49.97
Next 100 .....	35.01	36.24	37.36	37.85	39.44	41.02	42.95	45.27	46.94
Next 100 .....	33.08	34.24	35.30	35.76	37.26	38.75	40.57	42.76	44.34
Next 435 .....	31.05	32.14	33.14	33.57	34.98	36.38	38.09	40.15	41.64
Next 250 .....	28.26	29.25	30.16	30.55	31.83	33.10	34.66	36.53	37.88
Next 315 .....	24.73	25.60	26.39	26.73	27.85	28.96	30.32	31.96	33.14
Next 225 .....	22.23	23.01	23.72	24.03	25.04	26.04	27.26	28.73	29.79
Next 275 .....	20.70	21.42	22.08	22.37	23.31	24.24	25.38	26.75	27.74
Next 175 .....	20.00	20.70	21.34	21.62	22.53	23.43	24.53	25.85	26.81
Next 150 .....	...	20.00	20.63	20.90	21.78	22.65	23.71	24.99	25.91
Next 200 .....	...	...	20.00	20.26	21.11	21.95	22.98	24.22	25.12
Next 150 .....	...	...	...	20.00	20.84	21.67	22.69	23.92	24.81
Next 100 .....	...	...	...	...	20.00	20.80	21.78	22.96	23.81
Next 250 .....	...	...	...	...	...	20.00	20.94	22.07	22.89
Next 275 .....	...	...	...	...	...	...	20.00	21.08	21.86
Next 175 .....	...	...	...	...	...	...	20.00	21.08	20.74
Next 175 .....	...	...	...	...	...	...	...	...	20.00

See footnotes at end of table.



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

Table 2.A16.—Formulas for computing PIA from AMW based on earnings after 1950, and percentage increases in PIA—*Continued*

Effective for .....	Dec. 1992	Dec. 1993	Dec. 1994	Dec. 1995	Dec. 1996	Dec. 1997	Dec. 1998	Dec. 1999	Dec. 2000
Percentage increase in PIA .....	3.0	2.6	2.8	2.6	2.9	2.1	1.3	1 <sup>3</sup> 2.4	3.5
AMW	Percentage of AMW applicable to PIA								
First \$110 .....	333.11	341.77	351.34	360.47	370.93	378.72	383.64	392.85	406.60
Next 290 .....	121.15	124.30	127.78	131.10	134.90	137.73	139.52	142.87	147.87
Next 150 .....	113.21	116.15	119.40	122.50	126.06	128.71	130.38	133.51	138.18
Next 100 .....	133.13	136.59	140.41	144.06	148.24	151.35	153.32	157.00	162.50
Next 100 .....	74.03	75.95	78.08	80.11	82.43	84.16	85.26	87.30	90.36
Next 250 .....	61.69	63.29	65.06	66.75	68.69	70.13	71.04	72.75	75.30
Next 175 .....	55.59	57.04	58.64	60.16	61.91	63.21	64.03	65.57	67.86
Next 100 .....	51.47	52.81	54.29	55.70	57.32	58.52	59.28	60.71	62.83
Next 100 .....	48.35	49.61	51.00	52.33	53.84	54.97	55.69	57.02	59.02
Next 100 .....	45.67	46.86	48.17	49.42	50.86	51.93	52.60	53.87	55.75
Next 435 .....	42.89	44.01	45.24	46.42	47.76	48.76	49.40	50.58	52.35
Next 250 .....	39.02	40.03	41.15	42.22	43.44	44.35	44.93	46.01	47.62
Next 315 .....	34.13	35.02	36.00	36.94	38.01	38.81	39.31	40.26	41.67
Next 225 .....	30.68	31.48	32.36	33.20	34.16	34.88	35.33	36.18	37.44
Next 275 .....	28.57	29.31	30.13	30.91	31.81	32.48	32.90	33.69	34.87
Next 175 .....	27.61	28.33	29.12	29.88	30.74	31.39	31.79	32.56	33.70
Next 150 .....	26.69	27.38	28.15	28.88	29.72	30.34	30.74	31.48	32.58
Next 200 .....	25.87	26.54	27.28	27.99	28.80	29.40	29.79	30.50	31.57
Next 150 .....	25.55	26.21	26.94	27.64	28.44	29.04	29.41	30.12	31.17
Next 100 .....	24.52	25.16	25.86	26.53	27.30	27.87	28.24	28.91	29.93
Next 250 .....	23.58	24.19	24.87	25.52	26.26	26.81	27.16	27.81	28.79
Next 275 .....	22.52	23.11	23.76	24.38	25.08	25.61	25.94	26.56	27.49
Next 175 .....	21.36	21.92	22.53	23.12	23.79	24.29	24.61	25.20	26.08
Next 175 .....	20.60	21.14	21.73	22.29	22.94	23.42	23.73	24.30	25.15
Next 175 .....	20.00	20.52	21.09	21.64	22.27	22.74	23.03	23.59	24.41
Next 250 .....	...	20.00	20.56	21.09	21.71	22.17	22.45	22.99	23.80
Next 50 .....	...	...	20.00	20.52	21.12	21.56	21.84	22.37	23.15
Next 125 .....	...	...	...	20.00	20.58	21.01	21.29	21.80	22.56
Next 225 .....	...	...	...	...	20.00	20.42	20.69	21.18	21.92
Next 250 .....	...	...	...	...	...	20.00	20.26	20.75	21.47
Next 350 .....	...	...	...	...	...	...	20.00	20.48	21.20
Next 300 .....	...	...	...	...	...	...	...	20.00	20.70
Next 350 .....	...	...	...	...	...	...	...	...	20.00

<sup>1</sup> Average increase in benefits of about 77%—from 100% at the lowest level to 50% at the highest level.

<sup>2</sup> Increase of 12.5% or \$5, if larger.

<sup>3</sup> Average increase of about 13%, with minimum increase of \$5.

<sup>4</sup> Increase of 7% or \$3, if larger.

<sup>5</sup> Increase of 7% or \$4, if larger.

<sup>6</sup> Applied to first \$100 of AMW.

<sup>7</sup> Applied to next \$200 of AMW.

<sup>8</sup> Applied to next \$190 before 1955 and to next \$240 effective for January 1955.

<sup>9</sup> Applied to next \$150 effective for January 1973 and to next \$350 effective for January 1974.

<sup>10</sup> Increase effective in two steps: 7% for March–May and other 4% for June.

<sup>11</sup> Beginning June 1975 all benefit increases are based on automatic cost-of-living adjustments

<sup>12</sup> Applied to next \$100 before January 1975.

<sup>13</sup> The December 1999 cost-of-living adjustment (COLA) was originally determined to be 2.4%, based on the Consumer Price Index (CPI). The underlying CPI was later recomputed by the Bureau of Labor Statistics; a 2.5% COLA would have been consistent with the recomputed CPI. Pursuant to P.L. 106–554, benefits will be calculated and paid in August 2001 and later as if the December 1999 COLA had been 2.5%. Affected beneficiaries will receive a one-time payment to cover the shortfall that occurred before August 2001.

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

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

Year enacted	Effective for—	Minimum PIA <sup>1</sup>	Maximum family benefit	
			Percentage of AMW	But not less than—
1935 .....	...	\$10.00	...	...
1939 .....	...	...	Lesser of 80%, \$85, or 200% of PIA	\$20.00
1950 .....	September 1950	20.00	80% of first \$187.50	40.00
1952 .....	September 1952	25.00	80% of first \$210.93	45.00
1954 .....	September 1954	30.00	80% of first \$250	50.00 or 150% of PIA
1958 .....	January 1959	33.00	80% of first \$317.50	20.00 + PIA or 150% of PIA
1961 .....	August 1961	40.00	...	150% of PIA
1965 .....	January 1965	44.00	80% of first \$370 + 40% of next \$180	...
1967 .....	February 1968	55.00	80% of first \$436 + 40% of next \$214	...
1969 .....	January 1970	64.00	...	...
1971 .....	January 1971	70.40	88% of first \$436 + 44% of next \$191 <sup>2</sup>	...
1972 .....	September 1972	84.50	105.6% of first \$436 + 52.8% of next \$191 <sup>2</sup>	...
1973 <sup>3</sup> .....	June 1974	89.50	111.8% of first \$436 + 55.9% of next \$191 <sup>2</sup>	...
1973 <sup>4</sup> .....	March 1974	90.50	113.0% of first \$436 + 56.5% of next \$191 <sup>2</sup>	...
	June 1974	93.80	117.2% of first \$436 + 58.6% of next \$191 <sup>2</sup>	...
	June 1975	101.40	126.6% of first \$436 + 63.3% of next \$191 <sup>2</sup>	...
	June 1976	107.90	134.7% of first \$436 + 67.3% of next \$191 <sup>2</sup>	...
	June 1977	114.30	142.6% of first \$436 + 71.3% of next \$191 <sup>2</sup>	...
	June 1978	121.80	151.9% of first \$436 + 76.0% of next \$191 <sup>2</sup>	...
	June 1979	133.90	167.0% of first \$436 + 83.5% of next \$191 <sup>2</sup>	...
	June 1980	153.10	190.9% of first \$436 + 95.4% of next \$191 <sup>2</sup>	...
1981 <sup>5</sup> .....	June 1981	170.30	212.2% of first \$436 + 106.1% of next \$191 <sup>2</sup>	...
	March 1982	(6)	...	...
1981 .....	June 1982	182.90	227.9% of first \$436 + 114.0% of next \$191 <sup>2</sup>	...
	December 1983	189.30	235.9% of first \$436 + 118.0% of next \$191 <sup>2</sup>	...
	December 1984	195.90	244.2% of first \$436 + 122.1% of next \$191 <sup>2</sup>	...
	December 1985	201.90	251.8% of first \$436 + 125.9% of next \$191 <sup>2</sup>	...
	December 1986	204.50	255.1% of first \$436 + 127.5% of next \$191 <sup>2</sup>	...
	December 1987	213.00	265.8% of first \$436 + 132.9% of next \$191 <sup>2</sup>	...
	December 1988	221.50	276.4% of first \$436 + 138.2% of next \$191 <sup>2</sup>	...
	December 1989	231.90	289.4% of first \$436 + 144.7% of next \$191 <sup>2</sup>	...
	December 1990	244.40	305.0% of first \$436 + 152.5% of next \$191 <sup>2</sup>	...
	December 1991	253.40	316.3% of first \$436 + 158.1% of next \$191 <sup>2</sup>	...
	December 1992	261.00	325.8% of first \$436 + 162.8% of next \$191 <sup>2</sup>	...
	December 1993	267.70	334.3% of first \$436 + 167.0% of next \$191 <sup>2</sup>	...
	December 1994	275.10	343.7% of first \$436 + 171.7% of next \$191 <sup>2</sup>	...
	December 1995	282.20	352.6% of first \$436 + 176.2% of next \$191 <sup>2</sup>	...
	December 1996	290.30	362.8% of first \$436 + 181.3% of next \$191 <sup>2</sup>	...
	December 1997	296.30	370.4% of first \$436 + 185.1% of next \$191 <sup>2</sup>	...
December 1998	300.10	375.2% of first \$436 + 187.5% of next \$191 <sup>2</sup>	...	
December 1999 <sup>7</sup>	307.30	384.2% of first \$436 + 192.0% of next \$191 <sup>2</sup>	...	
December 2000	318.00	397.6% of first \$436 + 198.7% of next \$191 <sup>2</sup>	...	

<sup>1</sup> Based on earnings; subject to reduction if claimed before age 65.

<sup>2</sup> For AMW of \$628 or more, 175 percent of PIA.

<sup>3</sup> Superseded by 1973 legislation.

<sup>4</sup> Beginning in 1975, minimum PIA and percentages in maximum family benefit formula subject to automatic cost-of-living increases. (Superseded 1972 legislation for automatic increases beginning in 1974.)

<sup>5</sup> Superseded by 1981 legislation that restored the minimum PIA for these groups.

<sup>6</sup> Minimum PIA eliminated by 1981 legislation.

<sup>7</sup> The December 1999 cost-of-living adjustment (COLA) was originally determined to be 2.4 percent, based on the consumer price index (CPI). The underlying CPI was later recomputed by the Bureau of Labor Statistics; a 2.5 percent COLA would have been consistent with the recomputed CPI. Pursuant to P.L.106-554, benefits will be calculated and paid in August 2001 and later as if the December 1999 COLA had been 2.5 percent. Affected beneficiaries will receive a one-time payment to cover the shortfall that occurred before August 2001.

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

Table 2.A18.—Automatic adjustment provisions

Year enacted	Adjustment of—	Provision
1977 .....	Quarter of coverage	Mandatory annual determination, beginning in 1978, as to whether or not an adjustment is required in the amount of wages and self-employment earnings an individual needs in order to be credited with a quarter of coverage (QC) in the succeeding year. The amount required for a QC is the product of \$250 (in effect in 1978) multiplied by the following quotient: the national average wage for the year before the year of determination, divided by the average wage for 1976 (see column 2 in table 2.A8 for average annual wages after 1950). The resulting product, rounded to the nearest multiple of \$10, is the new amount required for a QC. In no case, however, is the new amount reduced below the amount in effect in the year of determination.
1972 .....	Maximum amount of taxable and creditable earnings	<p>The 1972 Act (as modified by the 1973 legislation) mandated a determination in 1974, and in every subsequent year in which a cost-of-living benefit increase is established, as to whether or not an adjustment is required in the maximum amount of annual earnings that will be taxed and credited toward benefits.</p> <p>The determination in the years after 1975 is made by multiplying the "maximum" in effect in the year of determination by the following quotient: the national average wage for the year before the year of determination, divided by the average wage for the year before the most recent year in which an automatic determination was made that resulted in an increase or in which an increase in the maximum was enacted. (See column 2 in table 2.A8 for annual amounts of the average wage after 1950). The resulting product, rounded to the nearest multiple of \$300, is the new maximum amount of taxable and creditable earnings, effective with respect to remuneration paid after the year of determination and with respect to taxable years beginning after that year. In no case, however, is the maximum reduced to an amount below the maximum in the year of determination.</p>
1976 .....		In the 1974 and 1975 determinations the quotient was the average wage for the year of determination, estimated from data for the first calendar quarter, divided by the corresponding amount for the year before the year of determination. Public Law 94-202 (signed Jan. 2, 1976) revised the adjustment method by increasing by a year the lag in average wages used in the computation. Thus, for example, the 1976 determination was based on the percentage increase in the average wage from 1974 to 1975.
1977 .....		Statutory in lieu of automatic increases in the maximum instituted for 1979, 1980, and 1981. Also, for purposes of establishing a "year of coverage" used in the computation of the special minimum PIA, annual maximum taxable and creditable earnings after 1978 are the amounts that would have been determined under the automatic adjustment provisions if the statutory increases in the maximum under the 1977 Act had not been enacted (see table 2.A12).
1989 .....		Automatic increases in the maximum for 1990, 1991, and 1992 determined under a transitional rule, specified by the Omnibus Budget Reconciliation Act of 1989, for computing "deemed" average annual wage for 1988, 1989, and 1990. The purpose of the legislation was to include contributions to certain "deferred compensation" plans, most importantly sections 401(k) pension plans, in the average annual average wage.
1994 .....		The determination for years after 1994 is made by multiplying \$60,600, the "maximum" for 1994, by the following quotient: the national average wage index for the year before the year in which the determination is made, divided by the national average wage index for 1992. (See column 2 in table 2.A8 for annual amounts of the national average wage index.) The resulting product, rounded to the nearest \$300, is the new maximum amount of taxable and creditable earnings, effective with respect to remuneration paid in (and taxable years beginning in) the year following the year the determination is made. In no case, however, is the new maximum reduced to an amount below the maximum in the year of determination.
1977 .....	Benefits: Computation	New benefit computation method based on average indexed monthly earnings (AIME) after 1950, effective for workers first eligible after 1978. Provision for automatic adjustment of the dollar amounts, or bend points, defining (1) the AIME brackets in the PIA formula (see table 2.A11) and (2) the PIA brackets in the maximum family benefit formula (see table 2.A13). New bend points are established by multiplying the bend points in effect in 1979—\$180 and \$1,085 for the PIA formula and \$230, \$332, and \$433 for the maximum family benefit formula—by the following quotient: the national average wage for the second year before the year for which the determination was made, divided by the average wage for 1977 (see column 2 in table 2.A8 for average annual wages after 1950). The resulting products, rounded to the nearest dollar, are the new bend points.
1980 .....		Modified maximum family benefit formula applicable to workers with initial entitlement to disability benefits in or after July 1980 (see table 2.A14). New formula for disabled workers has no bend points subject to automatic adjustment.
1972 .....	Benefits: Cost-of-living increase	Under the original provisions (based on 1972 and 1973 legislation), the arithmetical mean of the consumer price index (CPI) for January, February, and March in the year of determination was compared with the arithmetical mean of the CPI for the later of (a) January, February, and March of the year in which the last effective cost-of-living increase was established or (b) the 3 months of the calendar quarter in which the effective month of the last general benefit increase occurred. (Before the introduction, in 1977, of the alternative CPI series for "all urban consumers," or the CPI-U, the CPI-W was referred to as the CPI.) If the percentage increase in the CPI, rounded to the nearest one-tenth of 1 percent, was at least 3.0 (the triggering requirement), a cost-of-living benefit increase was established and the level of benefits increased by the same percentage, effective for June of the year in which the determination was made.
1983 .....		The 1983 Act moved the effective date for a cost-of-living benefit increase from June to December, beginning in 1983, and eliminated the "triggering requirement" for the 1983 increase only. Effective with the determination made in 1984, the two periods used in calculating the CPI-W percentage increase were shifted from the first to the third quarter.

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

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

Year enacted	Adjustment of—	Provision
		<p>The 1983 Act also introduced an alternative method for determining the size of a cost-of-living adjustment. This method, called the stabilizer provision, is applied when the ratio of the combined OASDI trust fund assets to estimated outgo falls below a certain percentage. The "triggering" percentage is 15 percent for 1985–1988 and 20 percent for years after 1988. Under these circumstances, the cost-of-living adjustment is based on the lesser of the CPI-W percentage increase determined above or the increase in average wages. The latter increase is the percentage, rounded to the nearest one-tenth of 1 percent by which the national average wage for the year before the year of determination exceeds the average wage for the year before the most recent year in which either a cost-of-living increase or a general benefit increase occurred. (See column 2 in table 2.A8 for the annual amount of the average wage after 1950 and footnote 1 in table 2.A8 for the underlying data sources.)</p> <p>The 1983 legislation also included a provision for making up any benefit increases that are based on a lower wage increase rather than on the increase in the cost of living. When the fund ratio is greater than 32 percent, additional increases will be provided so that benefits are increased to the level at which they would have been if all increases had been based on the CPI-W. (See table 2.A19 for the cumulative effect of statutory and automatic increases in benefits.)</p>
1986 .....		Triggering requirement eliminated for cost-of-living increases in and after 1986 by P.L. 99–509 (signed Oct. 21, 1986).
2001 .....		The December 1999 cost-of-living adjustment (COLA) was originally determined to be 2.4 percent, based on the consumer price index (CPI). The underlying CPI was later recomputed by the Bureau of Labor Statistics; a 2.5 percent COLA would have been consistent with the recomputed CPI. Pursuant to P.L. 106-554, benefits will be calculated and paid in August 2001 and later as if the December 1999 COLA had been 2.5 percent. Affected beneficiaries will receive a one-time payment to cover the shortfall that occurred before August 2001.
1972 .....	Earnings test	<p>The 1972 Act (as modified by the 1973 Acts) mandated a determination in 1974, and in every subsequent year in which a cost-of-living increase is established, as to whether or not an adjustment in the exempt amount—the amount of earnings permitted without reduction in benefits—is required.</p> <p>The determination in the years after 1975 is made by multiplying the monthly exempt amount in effect in the year of determination by the following quotient: the national average wage for the year before the year of determination, divided by the average wage for the year before the most recent year in which an automatic determination was made that resulted in an increase or in which an increase in the exempt amount was enacted. (See column 2 in table 2.A8 for annual amounts of the average wage after 1950). The resulting product, rounded to the nearest multiple of \$10, is the new monthly exempt amount, effective with respect to remuneration paid after the year of determination and with respect to taxable year beginning after that year. In no case, however, is the new exempt amount reduced below the exempt amount in the year of determination. The new annual exempt amount is determined by multiplying the new monthly amount by 12.</p>
1976 .....		In the 1974 and 1975 determinations the quotient was the average wage for the year of determination, estimated from data for the first calendar quarter, divided by the corresponding amount for the year before the year of determination. Public Law 94–202 (signed Jan. 2, 1976) revised the adjustment method by increasing by a year the lag in average wages used in the computation. Thus, for example, the 1976 determination was based on the percentage increase in the average wage from 1974 to 1975.
1994 .....		The determination for years after 1994 is made by multiplying the monthly exempt amounts in effect for 1994 (\$930 for beneficiaries who have, \$670 for beneficiaries who have not yet, reached "full retirement age" See footnote 6 in table 2.A29) by the following quotient: the national average wage index for the year before the year in which the determination is made, divided by the national average wage index for 1992. (See column 2 in table 2.A8 for annual amounts of the national average wage index.) The resulting products, rounded to the nearest \$10, are the new monthly exempt amounts effective for the year following the year the determination is made. The new annual exempt amounts are determined by multiplying the new monthly amounts by 12.
1996 .....		Public Law 104–121, enacted Mar. 29, 1996, suspended the automatic indexing of the exempt amounts through the year 2002 for workers aged 65–69. It legislated ad hoc increases in the annual exempt amounts to \$12,500 in 1996; \$13,500 in 1997; \$14,500 in 1998; \$15,500 in 1999; \$17,000 in 2000; \$25,000 in 2001; and \$30,000 in 2002. Thereafter, the exempt amounts will increase automatically based on the annual increase in the national average wage index as under the 1994 legislation.
2000 .....		Public Law 106–182, enacted Apr. 7, 2000, eliminated the earnings test beginning with the month a beneficiary reaches full retirement age (FRA). The annual earnings test that applies in the year of attainment of FRA is based on the annual limits established under P.L. 104–121 (including the \$1 for \$3 withholding rate). In determining annual earnings for purposes of the annual earnings test under this legislation, only earnings before the month of attainment of FRA will be considered. Public Law 106–182 did not change the annual exempt amount for beneficiaries who are under FRA throughout the year, which continues to be pegged to increases in the average wage.

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2.A OASDI: Benefit Computation & Automatic Adjustments

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

Base dates/ COLA	Illustrated benefit growth (Cost-of-living adjustment (COLA) increases only. Rounded to nearest dollar)												
	Aug. 1950 ...	Sept. 1950 77.0	Sept. 1952 12.5	Sept. 1954 13.0	Jan. 1959 7.0	Jan. 1965 7.0	Feb. 1968 13.0	Jan. 1970 15.0	Jan. 1971 10.0	Sept. 1972 20.0	June 1974 11.0	June 1975 8.0	June 1976 6.4
Aug. 1950.....	\$100	\$177	\$199	\$225	\$241	\$258	\$291	\$335	\$368	\$442	\$491	\$530	\$564
Sept. 1950.....	...	100	113	127	136	146	164	189	208	250	277	299	318
Sept. 1952.....	...	...	100	113	121	129	146	168	185	222	246	266	283
Sept. 1954.....	...	...	...	100	107	114	129	149	164	196	218	235	250
Jan. 1959.....	...	...	...	...	100	107	121	139	153	184	204	220	234
Jan. 1965.....	...	...	...	...	...	100	113	130	143	172	190	206	219
Feb. 1968.....	...	...	...	...	...	...	100	115	127	152	168	182	194
Jan. 1970.....	...	...	...	...	...	...	...	100	110	132	147	158	168
Jan. 1971.....	...	...	...	...	...	...	...	...	100	120	133	144	153
Sept. 1972.....	...	...	...	...	...	...	...	...	...	100	111	120	128
June 1974.....	...	...	...	...	...	...	...	...	...	...	100	108	115
June 1975.....	...	...	...	...	...	...	...	...	...	...	...	100	106
June 1976.....	...	...	...	...	...	...	...	...	...	...	...	...	100
	June 1977 5.9	June 1978 6.5	June 1979 9.9	June 1980 14.3	June 1981 11.2	June 1982 7.4	Dec. 1983 3.5	Dec. 1984 3.5	Dec. 1985 3.1	Dec. 1986 1.3	Dec. 1987 4.2	Dec. 1988 4.0	Dec. 1989 4.7
Aug. 1950.....	\$597	\$636	\$699	\$799	\$888	\$954	\$987	\$1,022	\$1,053	\$1,067	\$1,112	\$1,156	\$1,211
Sept. 1950.....	337	359	395	451	502	539	558	577	595	603	628	653	684
Sept. 1952.....	300	319	351	401	446	479	496	513	529	536	558	581	608
Sept. 1954.....	265	283	310	355	395	424	439	454	468	474	494	514	538
Jan. 1959.....	248	264	290	332	369	396	410	424	437	443	462	480	503
Jan. 1965.....	232	247	271	310	345	370	383	397	409	414	432	449	470
Feb. 1968.....	205	218	240	274	305	328	339	351	362	367	382	397	416
Jan. 1970.....	178	190	209	239	265	285	295	305	315	319	332	345	362
Jan. 1971.....	162	173	190	217	241	259	268	277	286	290	302	314	329
Sept. 1972.....	135	144	158	181	201	216	223	231	238	241	252	262	274
June 1974.....	122	130	142	163	181	194	201	208	215	218	227	236	247
June 1975.....	113	120	132	151	168	180	186	193	199	201	210	218	229
June 1976.....	106	113	124	142	158	169	175	181	187	189	197	205	215
June 1977.....	100	107	117	134	149	160	165	171	176	179	186	194	203
June 1978.....	...	100	110	126	140	150	155	161	166	168	175	182	190
June 1979.....	...	...	100	114	127	137	141	146	151	153	159	166	173
June 1980.....	...	...	...	100	111	119	124	128	132	134	139	145	152
June 1981.....	...	...	...	...	100	107	111	115	119	120	125	130	136
June 1982.....	...	...	...	...	...	100	104	107	110	112	117	121	127
Dec. 1983.....	...	...	...	...	...	...	100	104	107	108	113	117	123
Dec. 1984.....	...	...	...	...	...	...	...	100	103	104	109	113	118
Dec. 1985.....	...	...	...	...	...	...	...	...	100	101	106	110	115
Dec. 1986.....	...	...	...	...	...	...	...	...	...	100	104	108	113
Dec. 1987.....	...	...	...	...	...	...	...	...	...	...	100	104	109
Dec. 1988.....	...	...	...	...	...	...	...	...	...	...	...	100	105
Dec. 1989.....	...	...	...	...	...	...	...	...	...	...	...	...	100

See footnotes at end of table.

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

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

Base dates/ COLA	Illustrated benefit growth (Cost-of-living adjustment (COLA) increases only. Rounded to nearest dollar)										
	Dec. 1990 5.4	Dec. 1991 3.7	Dec. 1992 3.0	Dec. 1993 2.6	Dec. 1994 2.8	Dec. 1995 2.6	Dec. 1996 2.9	Dec. 1997 2.1	Dec. 1998 1.3	Dec. 1999 12.4	Dec. 2000 3.5
Aug. 1950.....	\$1,276	\$1,323	\$1,363	\$1,398	\$1,437	\$1,475	\$1,518	\$1,549	\$1,570	\$1,608	\$1,664
Sept. 1950.....	721	748	770	790	812	833	857	875	887	908	940
Sept. 1952.....	641	665	684	702	722	741	762	778	788	807	835
Sept. 1954.....	567	588	606	621	639	655	674	689	698	715	740
Jan. 1959.....	530	550	566	581	597	613	630	644	652	668	691
Jan. 1965.....	495	514	529	543	558	573	589	601	609	624	645
Feb. 1968.....	438	455	468	480	494	507	521	532	539	552	571
Jan. 1970.....	381	395	407	418	429	441	453	463	469	480	497
Jan. 1971.....	347	359	370	380	390	401	412	421	426	436	451
Sept. 1972.....	289	299	308	316	325	334	343	351	355	364	376
June 1974.....	260	270	278	285	293	301	309	316	320	328	339
June 1975.....	241	250	257	264	271	278	286	292	296	303	314
June 1976.....	226	235	242	248	255	262	269	275	278	285	295
June 1977.....	214	222	228	234	241	247	254	260	263	269	279
June 1978.....	201	208	214	220	226	232	239	244	247	253	262
June 1979.....	183	189	195	200	206	211	217	222	225	230	238
June 1980.....	160	166	171	175	180	185	190	194	197	202	209
June 1981.....	144	149	153	157	162	166	171	174	177	181	188
June 1982.....	134	139	143	147	151	155	159	162	165	169	175
Dec. 1983.....	129	134	138	142	146	149	154	157	159	163	169
Dec. 1984.....	125	130	133	137	141	144	149	152	154	158	163
Dec. 1985.....	121	126	129	133	136	140	144	147	149	153	158
Dec. 1986.....	120	124	128	131	135	138	142	145	147	151	156
Dec. 1987.....	115	119	123	126	129	133	137	139	141	144	149
Dec. 1988.....	110	114	118	121	124	128	131	134	136	139	144
Dec. 1989.....	105	109	113	116	119	122	125	128	130	133	138
Dec. 1990.....	<b>100</b>	104	107	110	113	116	119	121	123	126	130
Dec. 1991.....	...	<b>100</b>	103	106	109	111	115	117	119	122	126
Dec. 1992.....	...	...	<b>100</b>	103	105	108	111	114	115	118	122
Dec. 1993.....	...	...	...	<b>100</b>	103	105	109	111	112	115	119
Dec. 1994.....	...	...	...	...	<b>100</b>	103	106	108	109	112	116
Dec. 1995.....	...	...	...	...	...	<b>100</b>	103	105	106	109	112
Dec. 1996.....	...	...	...	...	...	...	<b>100</b>	102	103	105	109
Dec. 1997.....	...	...	...	...	...	...	...	<b>100</b>	101	103	107
Dec. 1998.....	...	...	...	...	...	...	...	...	<b>100</b>	102	106
Dec. 1999.....	...	...	...	...	...	...	...	...	...	<b>100</b>	104
Dec. 2000.....	...	...	...	...	...	...	...	...	...	...	<b>100</b>

<sup>1</sup> The December 1999 cost-of-living adjustment (COLA) was originally determined to be 2.4 percent, based on the consumer price index (CPI). The underlying CPI was later recomputed by the Bureau of Labor Statistics; a 2.5 percent COLA would have been consistent with the recomputed CPI. Pursuant to P.L. 106-554, benefits will be calculated and paid in August 2001 and later as if the December 1999 COLA had been 2.5 percent. Affected beneficiaries will receive a one-time payment to cover the shortfall that occurred before August 2001.

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

Type of benefit	Year enacted	Age	Percent of PIA	Condition or qualification																																
Retired worker	1935	65 or older	...	<i>Fully insured.</i> Amount based on cumulative wages.																																
	1939	...	100	Amount based on PIA.																																
	1956	Women: 62–64	...	Reduced 5/9 of 1% for each month under age 65.																																
	1961	Men: 62–64	...	Reduced 5/9 of 1% for each month under age 65.																																
	1972	...	...	Increased 1/12 of 1% for each month between ages 65 and 72 for which no benefits received after 1970 (PIA based on AMW only). Applicable only to worker whose benefit has not been actuarially reduced.																																
	1977	...	...	Increased 1/4 of 1% for each month after 1981 and between ages 65 and 72 in which no benefits received. Requirement for nonreceipt of actuarially reduced benefit removed.																																
	1983	100% of PIA payable at:	...	Applicable to workers who attain age 62 in year:																																
		65 and 2 months	...	2000																																
		65 and 4 months	...	2001																																
		65 and 6 months	...	2002																																
		65 and 8 months	...	2003																																
		65 and 10 months	...	2004																																
		66	...	2005–2016																																
		66 and 2 months	...	2017																																
		66 and 4 months	...	2018																																
		66 and 6 months	...	2019																																
		66 and 8 months	...	2020																																
	66 and 10 months	...	2021																																	
	67	...	2022 and later																																	
	62–66	...	Reduced 5/9 of 1% for each of the first 36 months of receipt of benefits immediately preceding the age at which 100% of PIA is payable, plus 5/12 of 1% for each of up to 24 earlier months of benefit receipt.																																	
	...	...	Increased by the following percentage for each month between the age at which 100% of PIA is payable and age 70 in which no benefits are received:																																	
			<table border="0"> <thead> <tr> <th><i>Age 62 in years—</i></th> <th><i>Rate of increase</i></th> <th><i>Annual rate</i></th> </tr> </thead> <tbody> <tr> <td>1987–1988.....</td> <td>7/24 of 1%</td> <td>3 1/2%</td> </tr> <tr> <td>1989–1990.....</td> <td>1/3 of 1%</td> <td>4%</td> </tr> <tr> <td>1991–1992.....</td> <td>9/24 of 1%</td> <td>4 1/2%</td> </tr> <tr> <td>1993–1994.....</td> <td>10/24 of 1%</td> <td>5%</td> </tr> <tr> <td>1995–1996.....</td> <td>11/24 of 1%</td> <td>5 1/2%</td> </tr> <tr> <td>1997–1998.....</td> <td>1/2 of 1%</td> <td>6%</td> </tr> <tr> <td>1999–2000.....</td> <td>13/24 of 1%</td> <td>6 1/2%</td> </tr> <tr> <td>2001–2002.....</td> <td>14/24 of 1%</td> <td>7%</td> </tr> <tr> <td>2003–2004.....</td> <td>15/24 of 1%</td> <td>7 1/2%</td> </tr> <tr> <td>2005 and later.....</td> <td>2/3 of 1%</td> <td>8%</td> </tr> </tbody> </table>	<i>Age 62 in years—</i>	<i>Rate of increase</i>	<i>Annual rate</i>	1987–1988.....	7/24 of 1%	3 1/2%	1989–1990.....	1/3 of 1%	4%	1991–1992.....	9/24 of 1%	4 1/2%	1993–1994.....	10/24 of 1%	5%	1995–1996.....	11/24 of 1%	5 1/2%	1997–1998.....	1/2 of 1%	6%	1999–2000.....	13/24 of 1%	6 1/2%	2001–2002.....	14/24 of 1%	7%	2003–2004.....	15/24 of 1%	7 1/2%	2005 and later.....	2/3 of 1%	8%
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2003–2004.....	15/24 of 1%	7 1/2%																																		
2005 and later.....	2/3 of 1%	8%																																		
	...	...	No further increases for months of nonreceipt of benefits after age 70, effective 1984.																																	
	...	...	Partial offset for receipt of pension based on noncovered employment, phased in over a 5-year period beginning in 1986 for individuals first eligible for Social Security and noncovered pension after 1985 (see table 2.A11).																																	
Disabled worker	1956	50–64	100	<i>Disability insured.</i> Waiting period of 6 calendar months. Reduced by amount of workers' compensation.																																
	1958	...	...	Reduction for workers' compensation eliminated.																																
	1960	Under 50	...	...																																
	1965	...	...	Reduced if benefits plus workers' compensation exceed 80% of the higher of AMW or high-5 year average taxable earnings in covered employment. Adjusted periodically for rises in wage levels.																																
	1967	...	...	Reduced if benefits plus workers' compensation exceed 80% of the higher of AMW or high 5-year average earnings in covered employment, regardless of taxable limit.																																
	1972	...	...	Reduced if benefits plus workers' compensation exceed 80% of the highest of (a) AMW, (b) high 5-year average earnings or (c) highest annual earnings in the period consisting of year of disability onset and 5 preceding years in covered employment. Waiting period reduced to 5 full calendar months.																																
	1983	...	...	Partial offset for receipt of pension based on noncovered employment phased in over a 5-year period beginning in 1986 for individuals first eligible for Social Security and noncovered pension after 1985.																																

CONTACT: Curt Pauzenga/Joseph Bondar (410) 965-7210/0162 for further information.

## 2.A OASDI: Benefits Types and Levels

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

Type of benefit	Year enacted	Age	Percent of PIA	Condition or qualification	
Wife .....	1939	65 or older	50	<i>Fully insured.</i>	
	1956	62–64	...	Reduced 25/36 of 1% for each month under age 65.	
	1967	...	...	Maximum \$105.	
	1969	...	...	Maximum eliminated.	
	1977	...	...	Reduced by full amount of pension payable based on own earnings in noncovered governmental employment (noncovered pension offset). Reduction does not apply if eligible for such pension before December 1982.	
	1983	...	...	Noncovered pension offset not applicable if first eligible for such pension before July 1983 and dependent. Reduced by only two-thirds of such pension if first eligible for it after June 1983.	
		65 and 2 months–67	...	Beginning in year 2000, the age at which 50% of PIA is payable will be gradually increased (see table 2.A20).	
		62–66	...	Reduced 25/36 of 1% for each of the first 36 months under the age at which 50% of PIA is payable, plus 5/12 of 1% for each of up to 24 earlier months of benefit receipt.	
	1984	...	...	Noncovered pension offset limited to two-thirds of such pension.	
	Divorced wife .....	1965	65 or older	50	<i>Fully insured.</i> Dependent. Married 20 years. Not counted toward family maximum.
		62–64	...	Reduced 25/36 of 1% for each month under age 65.	
1967		...	...	Maximum \$105.	
1969		...	...	Maximum eliminated.	
1972		...	...	Dependency requirement eliminated.	
1977		...	...	Married 10 years.	
		...	...	Reduced by full amount of pension payable based on own earnings in noncovered governmental employment (noncovered pension offset). Reduction does not apply if eligible for such pension before December 1982 and married 20 years.	
1983		...	...	Noncovered pension offset not applicable if first eligible for such pension before July 1983 and dependent. Reduced by only two-thirds of such pension if first eligible for it after June 1983.	
		...	...	Can be independently entitled to benefits if divorced for 2 years or more (after marriage of 10 or more years) and worker could be entitled to benefits if he applied. Effective with benefits for months after December 1984.	
		65 and 2 months–67	...	Beginning in year 2000, the age at which 50% of PIA is payable will be gradually increased (see table 2.A20).	
	62–66	...	Reduced 25/36 of 1% for each of the first 36 months under the age at which 50% of PIA is payable, plus 5/12 of 1% for each of up to 24 earlier months of benefit receipt.		
1984	...	...	Noncovered pension offset limited to two-thirds of such pension.		
Wife (mother) .....	1950	Under 65	50	<i>Fully insured.</i> Caring for eligible child.	
	1965	...	...	Eligible child excludes student aged 18–21.	
	1967	...	...	Maximum \$105.	
	1969	...	...	Maximum eliminated.	
	1977	...	...	Reduced by full amount of pension payable based on own earnings in noncovered governmental employment (noncovered pension offset). Reduction does not apply if eligible for such pension before December 1982.	
	1981	...	...	Eligible child excludes nondisabled child aged 16–17.	
	1983	...	...	Noncovered pension offset not applicable if first eligible for such pension before July 1983 and dependent. Reduced by only two-thirds of such pension if first eligible for it after June 1983.	
	1984	...	...	Noncovered pension offset limited to two-thirds of such pension.	
	Child .....	1939	Under 18	50	<i>Fully insured.</i> <sup>1</sup>
		1965	18–21	...	Full-time student.
1972		...	...	Benefits extended to end of quarter or semester in which 22nd birthday occurs while undergraduate student.	

See footnotes at end of table.



2.A OASDI: Benefits Types and Levels

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

Type of benefit	Year enacted	Age	Percent of PIA	Condition or qualification
Child (cont.) .....		...	...	Includes grandchild under certain circumstances.
	1981	18–22	...	Student benefits eliminated (to be phased out gradually for those entitled before May 1982), except for elementary or secondary school students under age 19.
	1996	...	...	Stepchildren must be dependent on worker.
Disabled child .....	1956	18 or older	50	<i>Fully insured.</i> <sup>1</sup> Disabled before age 18.
	1972	...	...	Disabled before age 22.
Husband .....		...	...	Includes grandchild under certain circumstances.
	1950	65 or older	50	<i>Fully and currently insured.</i> Dependent.
	1961	62–64	...	Reduced 25/36 of 1% for each month under age 65.
	1967	...	...	<i>Currently insured</i> requirement eliminated. Maximum \$105.
	1969	...	...	Maximum eliminated.
	1977	...	...	Dependency requirement eliminated.
		...	...	Reduced by full amount of pension payable based on own earnings in noncovered governmental employment (noncovered pension offset). Reduction does not apply if eligible for such pension before December 1982 and dependent.
	1983	...	...	Noncovered pension offset provision not applicable if first eligible for such pension before July 1983 and dependent. Reduced by only two-thirds of such pension if first eligible for it after June 1983.
		65 and 2 months–67	...	Beginning in year 2000, the age at which 50% of PIA is payable will be gradually increased (see table 2.A20).
		62–66	...	Reduced 25/36 of 1% for each of the first 36 months under the age at which 50% of PIA is payable, plus 5/12 of 1% for each of up to 24 earlier months of benefit receipt.
Divorced husband....	1984	...	...	Noncovered pension offset limited to two-thirds of such pension.
	1977 <sup>2</sup>	65 or older	50	<i>Fully insured.</i> Married 10 years. Not counted toward family maximum.
		62–64	...	Reduced 25/36 of 1% for each month under age 65.
		...	...	Reduced by full amount of pension payable based on own earnings in noncovered governmental employment (noncovered pension offset).
	1983	...	...	Noncovered pension offset not applicable if first eligible for such pension before July 1983 and dependent. Reduced by only two-thirds of such pension if first eligible after June 1983.
		...	...	Can be independently entitled to benefits if divorced for 2 years or more (after marriage of 10 or more years) and worker could be entitled to benefits if she applied. Effective with benefits for months after December 1984.
		65 and 2 months–67	...	Beginning in year 2000, the age at which 50% of PIA is payable will be gradually increased (see table 2.A20).
		62–66	...	Reduced 25/36 of 1% for each of the first 36 months under the age at which 50% of PIA is payable, plus 5/12 of 1% for each of up to 24 earlier months of benefit receipt.
	1984	...	...	Noncovered pension offset limited to two-thirds of such pension.
	Husband (father).....	1978 <sup>3</sup>	Under 65	50
1981		...	...	Eligible child excludes nondisabled child aged 16–17.
1983		...	...	Noncovered pension offset not applicable if first eligible for such pension before July 1983 and dependent. Reduced by only two-thirds of such pension if first eligible for it after June 1983.
1984		...	...	Noncovered pension offset limited to two-thirds of such pension.

<sup>1</sup> Under 1939 Act, generally not available to child of married female worker. Under 1950 Act, available if female worker is *fully and currently insured*. Currently insured requirement eliminated by 1967 Act.

<sup>2</sup> Northern District of California District Court decision in *Oliver v. Califano*, June 24, 1977. Statutory change enacted in 1983.

<sup>3</sup> Eastern District of Pennsylvania District Court decision in *Cooper v. Califano*, Dec. 29, 1978. Statutory change enacted in 1983.

CONTACT: Curt Pauzenga/Joseph Bondar (410) 965-7210/0162 for further information.

## 2.A OASDI: Benefit Types and Levels

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

Type of benefit	Year enacted	Age	Percent of PIA	Condition or qualification
Widow.....	1939	65 or older	75	<i>Fully insured.</i>
	1956	62–64	...	...
	1961	...	82 1/2	...
	1965	60–61	...	Reduced 5/9 of 1% for each month under age 62.
	1972	65 or older	100	Limited, if husband retired before age 65, to amount husband would be receiving if still living, but not less than 82 1/2% of PIA.
		60–64	...	Reduced 19/40 of 1% each month under age 65. In addition, for a widow aged 62–64 whose husband retired before age 65 limited to amount he would be receiving if still living, but not less than 82 1/2% of PIA.
	1977	...	...	Increased by any delayed retirement credit husband would be receiving.
		...	...	Reduced by full amount of pension payable based on own earnings in noncovered governmental employment (noncovered pension offset). Reduction does not apply if eligible for such pension before December 1982.
	1983	...	...	Noncovered pension offset not applicable if first eligible for such pension before July 1983 and dependent. Reduced by only two-thirds of such pension if first eligible for it after June 1983.
		100% of PIA payable at:	...	Applicable to widows who attain age 60 in year:
		65 and 2 months	...	2000
		65 and 4 months	...	2001
		65 and 6 months	...	2002
		65 and 8 months	...	2003
		65 and 10 months	...	2004
		66	...	2005–2016
		66 and 2 months	...	2017
		66 and 4 months	...	2018
		66 and 6 months	...	2019
		66 and 8 months	...	2020
66 and 10 months		...	2021	
67		...	2022 and later	
60–66	...	The percent of reduction for each month depends on the age at which 100% of PIA is payable. The percentage is adjusted so that the total reduction, in equal monthly steps, is always 28 1/2% at age 60.		
1984	...	...	Noncovered pension offset limited to two-thirds of such pension.	
Disabled widow .....	1967	50–59	82 1/2	<i>Fully insured.</i> Reduced 13 1/3%, plus 43/198 of 1% for each month under age 60. Includes divorced wife, dependent and married 20 years.
	1972	...	100	Reduced 28 1/2%, plus 43/240 of 1% for each month under age 60.
	1977	...	...	Increased by any delayed retirement credit husband would be receiving.
		...	...	Reduced by full amount of pension payable based on own earnings in noncovered governmental employment (noncovered pension offset). Reduction does not apply if eligible for such pension before December 1982.
	1983	...	...	Noncovered pension offset not applicable if first eligible for such pension before July 1983 and dependent. Reduced by only two-thirds of such pension if first eligible for it after June 1983.
		...	...	Additional reduction for each month under age 60 eliminated.
1984	...	...	Noncovered pension offset limited to two-thirds of such pension.	
Surviving divorced wife.....	1965	60 or older	82 1/2	<i>Fully insured.</i> Dependent. Married 20 years. Not counted toward family maximum. Reduced 5/9 of 1% for each month under age 62.
	1972	65 or older	100	Limited, if former husband retired before age 65, to amount he would be receiving if still living, but not less than 82 1/2% of PIA.
		60–64	...	Reduced 19/40 of 1% for each month under age 65. In addition, for widow aged 62–64 whose former husband retired before age 65, limited to amount he would be receiving if still living, but not less than 82 1/2% of PIA.
	1977	...	...	Dependency requirement eliminated.

See footnotes at end of table.

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

Type of benefit	Year enacted	Age	Percent of PIA	Condition or qualification	
Surviving divorced wife (cont.) .....		...	...	Increased by any delayed retirement increment former husband would be receiving.	
		...	...	Married 10 years.	
		...	...	Reduced by full amount of pension payable based on own earnings in noncovered governmental employment (noncovered pension offset). Reduction does not apply if eligible for such pension before December 1982 and married 20 years.	
	1983	...	...	Noncovered pension offset provision not applicable if first eligible for such pension before July 1983 and dependent. Reduced by only two-thirds of such pension if first eligible for it after June 1983.	
		65 and 2 months–67	...	Beginning in year 2000, the age at which 100% of PIA is payable will be increased gradually (see <i>Widow age</i> ).	
Disabled surviving divorced wife .....		60–66	...	The percent of reduction for each month depends on the age at which 100% of PIA is payable. The percentage is adjusted so that the total reduction, in equal monthly steps, is always 28 1/2% at age 60.	
	1984	...	...	Noncovered pension offset limited to two-thirds of such pension.	
	1967	50–59	82 1/2	<i>Fully insured.</i> Dependent. Married 20 years. Not counted toward family maximum. Reduced 13 1/3%, plus 43/198 of 1% for each month under age 62.	
	1972	...	100	Reduced 28 1/2%, plus 43/240 of 1% for each month under age 60.	
		...	...	Dependency requirement eliminated.	
	1977	...	...	Increased by any delayed retirement increment husband (or former husband) would be receiving.	
		...	...	Married 10 years.	
		...	...	Reduced by full amount of pension payable based on own earnings in noncovered governmental employment (noncovered pension offset). Reduction does not apply if eligible for such pension before December 1982 and married 20 years.	
	1983	...	...	Noncovered pension offset not applicable if first eligible for such pension before July 1983 and dependent. Reduced by only two-thirds of such pension if first eligible for it after June 1983.	
		...	...	Additional reduction for each month under age 60 eliminated.	
Widowed mother .....	1984	...	...	Noncovered pension offset limited to two-thirds of such pension.	
	1939	Under 65	75	<i>Fully or currently insured.</i> Caring for eligible child.	
	1965	...	...	Eligible child excludes student over age 18.	
	1977	...	...	Reduced by full amount of pension payable based on own earnings in noncovered governmental employment (noncovered pension offset). Reduction does not apply if eligible for such pension before December 1982.	
	1981	...	...	Eligible child excludes nondisabled child aged 16–17.	
	1983	...	...	Noncovered pension offset not applicable if first eligible for such pension before July 1983 and dependent. Reduced by only two-thirds of such pension if first eligible for it after June 1983.	
	1984	...	...	Noncovered pension offset limited to two-thirds of such pension.	
	Surviving divorced mother .....	1950	Under 65	75	<i>Fully or currently insured.</i> Caring for eligible child. Dependent. Not counted toward family maximum.
1965		...	...	Eligible child excludes student over age 18.	
1972		...	...	Dependency requirement eliminated.	
1977		...	...	Reduced by full amount of pension payable based on own earnings in noncovered governmental employment (noncovered pension offset). Reduction does not apply if eligible for such pension before December 1982.	
1981		...	...	Eligible child excludes nondisabled child aged 16–17.	
1983		...	...	Noncovered pension offset not applicable if first eligible for such pension before July 1983 and dependent. Reduced by only two-thirds of such pension if first eligible for it after June 1983.	
1984		...	...	Noncovered pension offset limited to two-thirds of such pension.	
Child .....		1939	Under 18	50	<i>Fully or currently insured.</i> <sup>1</sup> Student aged 16–17

See footnotes at end of table.

## 2.A OASDI: Benefit Types and Levels

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

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

See footnotes at end of table.

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

Type of benefit	Year enacted	Age	Percent of PIA	Condition or qualification	
Disabled widower (cont.)...	1983	...	...	Noncovered pension offset not applicable if first eligible for such pension before July 1983 and dependent. Reduced by only two-thirds of such pension if first eligible for it after June 1983.	
		...	...	Additional reduction for each month under age 60 eliminated.	
Surviving divorced husband.....	1984	...	...	Noncovered pension offset limited to two-thirds of such pension.	
	1980 <sup>2</sup>	65 or older	100	<i>Fully insured.</i> Married 10 years. Increased by any delayed retirement credit former wife would be receiving. Limited, if former wife retired before age 65, to amount she would be receiving if still living, but not less than 82 1/2% of PIA. Not counted toward family maximum. Reduced by full amount of pension payable based on own earnings in noncovered governmental employment (noncovered pension offset).	
		60–64	...	Reduced 19/40 of 1% for each month under age 65. In addition, for a widower aged 62–64 whose wife retired before age 65, limited to amount she would be receiving if still living, but not less than 82 1/2% of PIA.	
	1983	...	...	Noncovered pension offset provision not applicable if first eligible for such pension before July 1983 and dependent. Reduced by only two-thirds of such pension if first eligible for it after June 1983.	
		65 and 2 months–67	...	Beginning in year 2000, the age at which 50% of PIA is payable will be gradually increased (see Retired-Worker age).	
	62–66	...	Reduced 24/36 of 1% for each of the first 36 months under the age at which 50% of PIA is payable, plus 5/12 of 1% for each of up to 24 earlier months of benefit receipt.		
1984	...	...	Noncovered pension offset limited to two-thirds of such pension.		
Disabled surviving divorced husband.....	1980 <sup>2</sup>	50–59	100	<i>Fully insured.</i> Married 10 years. Increased by any delayed retirement credit former wife would be receiving. Reduced 28 1/2%, plus 43/240 of 1% for each month under age 60. Not counted toward family maximum. Reduced by full amount of pension payable based on own earnings in noncovered employment (noncovered pension offset).	
		...	...	Noncovered pension offset provision not applicable if first eligible for such pension before July 1983 and dependent. Reduced by only two-thirds of such pension if first eligible for it after June 1983.	
	1983	...	...	Additional reduction for each month under age 60 eliminated.	
		...	...	Noncovered pension offset limited to two-thirds of such pension.	
Widowed father .....	1975 <sup>3</sup>	Under 65	75	<i>Fully or currently insured.</i> Caring for eligible child under age 18.	
	1977	...	...	Reduced by full amount of pension payable based on own earnings in noncovered governmental employment (noncovered pension offset). Reduction does not apply if eligible for such pension before December 1982.	
		...	...	Eligible child excludes nondisabled child aged 16–17.	
	1983	...	...	Noncovered pension offset provision not applicable if first eligible for such pension before July 1983 and dependent. Reduced by only two-thirds of such pension if first eligible for it after June 1983.	
		...	...	Noncovered pension offset to two-thirds of such pension.	
	Surviving divorced father...	1979 <sup>4</sup>	Under 65	75	<i>Fully or currently insured.</i> Caring for eligible child under age 18. Reduced by full amount of pension payable based on own earnings in noncovered governmental employment (noncovered pension offset).
			...	...	Eligible child excludes nondisabled child aged 16–17.
1983		...	...	Noncovered pension offset provision not applicable if first eligible for such pension before July 1983 and dependent. Reduced by only two-thirds of such pension if first eligible for it after June 1983.	
		...	...	Noncovered pension offset limited to two-thirds of such pension.	

<sup>1</sup> Under 1939 Act, generally not available to child of married female worker. Under 1950 Act, available if female worker is fully and currently insured; currently insured requirement eliminated by 1967 Act.

<sup>2</sup> Oregon District Court decision in *Ambrose v. Harris*, July 17, 1980. Statutory change enacted in 1983.

<sup>3</sup> Supreme Court decision in *Weinberger v. Wiesenfeld*, Mar. 19, 1975. Statutory change enacted in 1983.

<sup>4</sup> Western District Court decision in *Yates v. Califano*, Jan. 28, 1979. Statutory change enacted in 1983.

## 2.A OASDI: Benefits Types and Levels

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

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

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

Year enacted	Age	Amount <sup>1</sup>		Effective for—
		Individual	Couple	
1966 .....	72	\$35.00	\$52.50	October 1966
1967 .....	...	40.00	60.00	February 1968
1969 .....	...	46.00	69.00	January 1970
1971 .....	...	48.30	72.50	January 1971
1972 <sup>2</sup> .....	...	58.00	87.00	September 1972
1973 <sup>3</sup> .....	...	61.50	92.30	June–December 1974
1973 <sup>4</sup> .....	...	62.10	93.20	March 1974
	...	64.40	96.60	June 1974
	...	69.50	104.40	June 1975
	...	74.10	111.20	June 1976
	...	78.50	117.80	June 1977
	...	83.70	125.60	June 1978
	...	92.00	138.10	June 1979
	...	105.20	157.90	June 1980
	...	117.00	175.70	June 1981
	...	125.60	188.60	June 1982
	1983 <sup>5</sup> .....	...	129.90	...
...		134.40	...	December 1984
...		138.50	...	December 1985
...		140.30	...	December 1986
...		146.10	...	December 1987
...		151.90	...	December 1988
...		159.00	...	December 1989
1990 .....	72 before 1972 <sup>6</sup>	167.50	...	December 1990
	...	173.60	...	December 1991
	...	178.80	...	December 1992
	...	183.40	...	December 1993
	...	188.50	...	December 1994
	...	193.40	...	December 1995
	...	199.00	...	December 1996
	...	203.10	...	December 1997
	...	205.70	...	December 1998
	...	210.60	...	<sup>7</sup> December 1999
	...	217.90	...	December 2000

<sup>1</sup> Monthly benefit reduced by amount of any government pension excluding workers' compensation benefits and veterans' compensation for service-connected disability or death. Not available for persons receiving assistance.

<sup>2</sup> Provision for future automatic cost-of-living adjustments.

<sup>3</sup> Suspended by 1973 legislation.

<sup>4</sup> Beginning June 1975, subject to automatic cost-of-living adjustments. Benefits no longer available to persons receiving payments under Supplemental Security Income program.

<sup>5</sup> Separate rate for couples eliminated. Rate for individuals applied to all beneficiaries.

<sup>6</sup> Effective for applications after Nov. 5, 1990p

<sup>7</sup> The December 1999 cost-of-living adjustment (COLA) was originally determined to be 2.4 percent, based on the consumer price index (CPI). The underlying CPI was later recomputed by the Bureau of Labor Statistics; a 2.5 percent COLA would have been consistent with the recomputed CPI. Pursuant to P.L. 106-554, benefits will be calculated and paid in August 2001 and later as if the December 1999 COLA had been 2.5 percent. Affected beneficiaries will receive a one-time payment to cover the shortfall that occurred before August 2001.

CONTACT: Curt Pauzenga/Joseph Bondar (410) 965-7210/0162 for further information.

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

Year enacted	Type of benefit	Provision
1935 .....	Lump-sum refund	Persons not insured at age 65 eligible for lump-sum refund equal to 3 1/2 percent of cumulative wage credits.
1939 .....		Lump-sum refund eliminated.
1935 .....	Lump-sum death payment	Under age 65: 3 1/2 percent of cumulative wage credits. Aged 65 or older and fully insured: 3 1/2 percent of cumulative wage credits, less monthly benefits received.
1939 .....		Fully and currently insured: 6 times PIA if no survivor eligible for monthly benefits.
1950 .....		3 times PIA for all deaths.
1954 .....		3 times PIA with maximum of \$255.
1981 .....		Payable only to a widow or widower who was living with the worker at time of the death or to a widow, widower, or children eligible for monthly benefits. Amount of lump sum fixed at \$255.
1965 .....	Vocational rehabilitation services	Available to selected disabled individuals. Costs of services payable from OASDI trust funds to state vocational rehabilitation agencies. Reimbursement in any year may not exceed 1 percent of the total amount of OASDI disability benefits disbursed in the prior year.
1972 .....		Maximum annual reimbursement increased to 1.25 percent for fiscal year ending June 30, 1973 and 1.50 percent thereafter.
1981 .....		Reimbursement from trust funds for cost of rehabilitation services made if the services result in the disabled individual's return to work (performance of substantial gainful activity for 9 consecutive months).
1999 .....		Enhancements including expanded beneficiary choice of service providers and extended health care for beneficiaries who return to work.

## 2.A OASDI: Benefit Types and Levels

Table 2.A26.—Monthly benefit amount for selected beneficiary families with first eligibility in 2000, by average indexed monthly earnings for selected wage levels, effective December 2000

Beneficiary family	Worker with yearly earnings equal to—				
	Federal minimum wage <sup>1</sup>	75% of average wage	Average wage <sup>2</sup>	150% of average wage	Maximum taxable earnings <sup>3</sup>
Retired-worker families <sup>4</sup>					
Average indexed monthly earnings.....	\$1,152.00	\$1,806.00	\$2,408.00	\$3,487.00	\$4,775.00
Primary insurance amount.....	700.20	916.90	1,116.20	1,423.40	1,623.30
Maximum family benefit.....	1,050.40	1,636.50	2,038.10	2,491.00	2,840.90
Monthly benefit amount:					
Retired worker claiming benefits at age 62:					
Worker alone.....	554.00	725.00	883.00	1,126.00	1,285.00
Worker with spouse claiming benefits at—					
Age 65 or older.....	904.00	1,183.00	1,441.00	1,837.00	2,096.00
Age 62.....	813.00	1,065.00	1,296.00	1,653.00	1,886.00
Survivor families <sup>5</sup>					
Average indexed monthly earnings.....	\$963.00	\$1,811.00	\$2,415.00	\$3,623.00	\$5,865.00
Primary insurance amount.....	637.60	918.50	1,118.50	1,444.50	1,792.60
Maximum family benefit.....	956.40	1,641.00	2,041.10	2,527.90	3,137.00
Monthly benefit amount:					
Survivor of worker deceased at age 40:					
1 surviving child.....	478.00	688.00	838.00	1,083.00	1,344.00
Widowed mother or father and 1 child.....	956.00	1,376.00	1,676.00	2,166.00	2,688.00
Widowed mother or father and 2 children.....	954.00	1,641.00	2,040.00	2,526.00	3,135.00
Disabled-worker families <sup>6</sup>					
Average indexed monthly earnings.....	\$1,064.00	\$1,808.00	\$2,410.00	\$3,616.00	\$5,530.00
Primary insurance amount.....	671.00	917.50	1,116.80	1,443.50	1,740.60
Maximum family benefit <sup>7</sup> .....	936.00	1,376.20	1,675.20	2,165.20	2,610.90
Monthly benefit amount:					
Disabled worker age 50:					
Worker alone.....	671.00	917.00	1,116.00	1,443.00	1,740.00
Worker, spouse, and 1 child.....	935.00	1,375.00	1,674.00	2,163.00	2,610.00

<sup>1</sup> Annual earnings are calculated by multiplying the federal minimum wage by 2,080 hours (see table 3.B3). Increases in the minimum wage during the year are prorated.

<sup>2</sup> See table 2.A8, column 2.

<sup>3</sup> See table 2.A9, column 1.

<sup>4</sup> Assumes the worker began to work at age 22, retired at age 62 in 2000 with maximum reduction, and had no prior period of disability.

<sup>5</sup> Assumes the deceased worker began to work at age 22, died in 2000 at age 40, had no earnings in that year, and had no prior period of disability.

<sup>6</sup> Assumes the worker began to work at age 22, became disabled at age 50 in 2000, had no earnings in that year, and had no prior period of disability.

<sup>7</sup> The 1980 Amendments to the Social Security Act provide for a different family maximum amount in disability cases. For disabled workers entitled after June 1980, the maximum is the smaller of (1) 85 percent of the worker's AIME (or 100 percent of the PIA, if larger) or (2) 150 percent of the PIA.



Table 2.A27.—Minimum and maximum monthly retired-worker benefits payable to individuals who retired at age 62, <sup>1</sup> 1957–2001

Year of attainment of age 62 <sup>2</sup>	Minimum benefit		Maximum benefit			
	Payable at time of retirement	Payable effective December 2000 <sup>3</sup>	Payable at time of retirement		Payable effective December 2000 <sup>3</sup>	
			Men	Women	Men	Women
1957.....	\$24.00	\$299.50	...	\$86.80	...	\$738.10
1958.....	24.00	299.50	...	86.80	...	738.10
1959.....	26.40	299.50	...	92.80	...	738.10
1960.....	26.40	298.20	...	95.20	...	757.20
1961.....	26.40	296.60	...	96.00	...	762.60
1962.....	32.00	295.60	\$93.60	96.80	\$743.90	769.40
1963.....	32.00	294.10	94.40	97.60	749.00	774.40
1964.....	32.00	294.10	95.20	98.40	753.60	779.60
1965.....	35.20	293.70	102.80	105.40	757.90	777.90
1966.....	35.20	291.40	102.80	106.20	755.30	780.40
1967.....	35.20	289.40	105.40	108.80	772.10	796.50
1968.....	<sup>4</sup> 44.00	285.70	<sup>4</sup> 121.00	<sup>4</sup> 124.80	776.00	801.20
1969.....	44.00	283.10	124.80	128.40	792.80	815.80
1970.....	51.20	279.00	146.80	151.90	800.40	828.00
1971.....	56.40	275.30	163.60	170.50	799.30	833.50
1972.....	56.40	271.30	167.10	172.90	805.60	833.30
1973.....	67.60	267.60	207.60	212.90	820.70	842.30
1974.....	67.60	263.30	217.00	219.70	846.00	856.00
1975.....	75.10	259.80	253.10	253.10	875.90	875.90
1976.....	81.20	256.90	285.60	285.60	904.10	904.10
1977.....	86.40	254.80	319.40	319.40	944.10	944.10
1978.....	91.50	253.70	354.60	354.60	987.40	987.40
1979.....	97.60	254.70	<sup>5</sup> 388.90	<sup>5</sup> 388.90	1,016.90	1,016.90
1980.....	97.60	231.50	<sup>5</sup> 402.80	<sup>5</sup> 402.80	958.30	958.30
1981.....	97.60	202.20	432.00	432.00	898.70	898.70
1982.....	(6)	(6)	474.60	474.60	888.30	888.30
1983.....	(6)	(6)	526.40	526.40	917.00	917.00
1984.....	(6)	(6)	559.40	559.40	941.60	941.60
1985.....	(6)	(6)	591.30	591.30	962.10	962.10
1986.....	(6)	(6)	630.50	630.50	995.00	995.00
1987.....	(6)	(6)	662.10	662.10	1,031.30	1,031.30
1988.....	(6)	(6)	686.70	686.70	1,026.70	1,026.70
1989.....	(6)	(6)	734.00	734.00	1,055.10	1,055.10
1990.....	(6)	(6)	774.60	774.60	1,063.70	1,063.70
1991.....	(6)	(6)	810.00	810.00	1,055.40	1,055.40
1992.....	(6)	(6)	854.10	854.10	1,073.30	1,073.30
1993.....	(6)	(6)	893.60	893.60	1,090.30	1,090.30
1994.....	(6)	(6)	948.00	948.00	1,127.50	1,127.50
1995.....	(6)	(6)	965.90	965.90	1,117.60	1,117.60
1996.....	(6)	(6)	999.90	999.90	1,127.60	1,127.60
1997.....	(6)	(6)	1,049.10	1,049.10	1,149.80	1,149.80
1998.....	(6)	(6)	1,109.60	1,109.60	1,191.10	1,191.10
1999.....	(6)	(6)	1,183.60	1,183.60	1,254.40	1,254.40
2000.....	(6)	(6)	1,241.70	1,241.70	1,285.10	1,285.10
2001.....	(6)	(6)	1,307.30	1,307.30	...	...

<sup>1</sup> Benefit first available at age 62 to female workers effective November 1956 and to male workers effective August 1961.

<sup>2</sup> Assumes the worker began to work at age 22, retired at the beginning of the year, had no prior disability, and received the maximum reduction. Through 1999 the assumed reduction was 36 months at 5/9 of 1 percent per month or 20 percent. In 2000, with the increase in the full retirement age to 65 and 2 months, the reduction increased to 20.008333 percent (see table 2.A.20). In 2001 the full retirement age increased to 65 and 4 months for a maximum reduction to 21.666667 percent.

<sup>3</sup> Final benefit amount payable after Supplementary Medical Insurance (SMI) premium or any other deduction is rounded to next lower \$1.

<sup>4</sup> Effective for February 1968.

<sup>5</sup> Derived from transitional guarantee computation based on 1978 PIA table.

<sup>6</sup> Minimum PIA eliminated by 1981 legislation for workers who attain age 62 in 1982 or later. (The minimum is retained until 1991 for members of religious orders who were under a vow of poverty, provided that the order had elected Social Security coverage before Dec. 29, 1981).

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

## 2.A OASDI: Benefit Types and Levels

Table 2.A28.—Minimum and maximum monthly retired-worker benefits payable to individuals who retired at age 65, 1940–2001

Year of attainment of age 65 <sup>1</sup>	Minimum benefit		Maximum benefit			
	Payable at time of retirement	Payable effective December 2000 <sup>2</sup>	Payable at time of retirement		Payable effective December 2000 <sup>2</sup>	
			Men	Women	Men	Women
1940.....	\$10.00	\$318.00	\$41.20	\$41.20	\$615.90	\$615.90
1941.....	10.00	318.00	41.60	41.60	615.90	615.90
1942.....	10.00	318.00	42.00	42.00	623.20	623.20
1943.....	10.00	318.00	42.40	42.40	623.20	623.20
1944.....	10.00	318.00	42.80	42.80	623.20	630.00
1945.....	10.00	318.00	43.20	43.20	630.00	630.00
1946.....	10.00	318.00	43.60	43.60	637.60	637.60
1947.....	10.00	318.00	44.00	44.00	643.50	643.50
1948.....	10.00	318.00	44.40	44.40	643.50	643.50
1949.....	10.00	318.00	44.80	44.80	649.90	649.90
1950.....	10.00	318.00	45.20	45.20	658.10	658.10
1951.....	20.00	318.00	68.50	68.50	658.10	658.10
1952.....	20.00	318.00	68.50	68.50	658.10	658.10
1953.....	25.00	318.00	85.00	85.00	726.90	726.90
1954.....	25.00	318.00	85.00	85.00	726.90	726.90
1955.....	30.00	318.00	98.50	98.50	726.90	726.90
1956.....	30.00	318.00	103.50	103.50	768.00	768.00
1957.....	30.00	318.00	108.50	108.50	802.80	802.80
1958.....	30.00	318.00	108.50	108.50	802.80	802.80
1959.....	33.00	318.00	116.00	116.00	802.80	802.80
1960.....	33.00	318.00	119.00	119.00	822.90	822.90
1961.....	33.00	318.00	120.00	120.00	829.50	829.50
1962.....	40.00	318.00	121.00	123.00	837.10	851.20
1963.....	40.00	318.00	122.00	125.00	843.70	864.10
1964.....	40.00	318.00	123.00	127.00	851.20	878.40
1965.....	44.00	318.00	131.70	135.90	851.20	878.40
1966.....	44.00	318.00	132.70	135.90	857.40	878.40
1967.....	44.00	318.00	135.90	140.00	878.40	904.30
1968.....	<sup>3</sup> 55.00	318.00	<sup>3</sup> 156.00	<sup>3</sup> 161.60	891.60	923.90
1969.....	55.00	318.00	160.50	167.30	917.90	956.40
1970.....	64.00	318.00	189.80	196.40	943.50	977.10
1971.....	70.40	318.00	213.10	220.40	962.80	995.10
1972.....	70.40	318.00	216.10	224.70	977.10	1,015.20
1973.....	84.50	318.00	266.10	276.40	1,001.80	1,040.80
1974.....	84.50	318.00	274.60	284.90	1,033.60	1,072.50
1975.....	93.80	318.00	316.30	333.70	1,072.50	1,131.70
1976.....	101.40	318.00	364.00	378.80	1,142.20	1,188.90
1977.....	107.90	318.00	412.70	422.40	1,217.40	1,245.80
1978.....	114.30	318.00	459.80	459.80	1,280.80	1,280.80
1979.....	121.80	318.00	503.40	503.40	1,316.50	1,316.50
1980.....	133.90	318.00	572.00	572.00	1,361.10	1,361.10
1981.....	153.10	318.00	677.00	677.00	1,409.40	1,409.40
1982.....	<sup>4</sup> 170.30	318.00	<sup>4</sup> 679.30	<sup>4</sup> 679.30	1,271.10	1,271.10
1983.....	<sup>4</sup> 166.40	289.30	709.50	709.50	1,236.70	1,236.70
1984.....	<sup>4</sup> 150.50	252.40	703.60	703.60	1,184.60	1,184.60
1985.....	(5)	(5)	717.20	717.20	1,167.00	1,167.00
1986.....	(5)	(5)	760.10	760.10	1,199.50	1,199.50
1987.....	(5)	(5)	789.20	789.20	1,229.60	1,229.60
1988.....	(5)	(5)	838.60	838.60	1,254.20	1,254.20
1989.....	(5)	(5)	899.60	899.60	1,293.40	1,293.40

See footnotes at end of table.

## 2.A OASDI: Benefit Types and Levels

Table 2.A28.—Minimum and maximum monthly retired-worker benefits payable to individuals who retired at age 65, 1940–2001—*Continued*

Year of attainment of age 65 <sup>1</sup>	Minimum benefit		Maximum benefit			
	Payable at time of retirement	Payable effective December 2000 <sup>2</sup>	Payable at time of retirement		Payable effective December 2000 <sup>2</sup>	
			Men	Women	Men	Women
1990.....	(5)	(5)	975.00	975.00	1,339.20	1,339.20
1991.....	(5)	(5)	1,022.90	1,022.90	1,333.00	1,333.00
1992.....	(5)	(5)	1,088.70	1,088.70	1,368.20	1,368.20
1993.....	(5)	(5)	1,128.80	1,128.80	1,377.30	1,377.30
1994.....	(5)	(5)	1,147.50	1,147.50	1,364.80	1,364.80
1995.....	(5)	(5)	1,199.10	1,199.10	1,387.30	1,387.30
1996.....	(5)	(5)	1,248.90	1,248.90	1,408.40	1,408.40
1997.....	(5)	(5)	1,326.60	1,326.60	1,454.00	1,454.00
1998.....	(5)	(5)	1,342.80	1,342.80	1,441.50	1,441.50
1999.....	(5)	(5)	1,373.10	1,373.10	1,455.20	1,455.20
2000.....	(5)	(5)	1,433.90	1,433.90	1,484.00	1,484.00
2001.....	(5)	(5)	<sup>6</sup> 1,536.70	<sup>6</sup> 1,536.70	...	...

<sup>1</sup> Assumes the worker began to work at age 22, retired at the beginning of the year, had no earnings after retirement and had no prior period of disability.

<sup>2</sup> Final benefit amount payable after Supplementary Medical Insurance (SMI) premium or any other deduction is rounded to next lower \$1.

<sup>3</sup> Effective for February 1968.

<sup>4</sup> Derived from transitional guarantee computation based on 1978 PIA table.

<sup>5</sup> Minimum PIA eliminated by 1981 legislation for workers who attain age 62 in 1982 or later. (The minimum is retained until 1991 for members of religious orders who are under a vow of poverty, provided that the order had elected Social Security coverage before Dec. 29, 1981).

<sup>6</sup> The December 1999 cost-of-living adjustment (COLA) was originally determined to be 2.4%, based on the Consumer Price Index (CPI). The underlying CPI was later recomputed by the Bureau of Labor Statistics; a 2.5% COLA would have been consistent with the recomputed CPI. Pursuant to P.L. 106–554, benefits will be calculated and paid in August 2001 and later as if the December 1999 COLA had been 2.5%. Affected beneficiaries will receive a one-time payment to cover the shortfall that occurred before August 2001. The benefit will be adjusted to \$1,538.20 to reflect the recomputation of the December 1999 COLA and will be paid retroactively to January 2001.

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

Table 2.A29.—Earnings (retirement) test

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

See footnotes at end of table.

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

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

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

<sup>1</sup> Earnings of retired-worker beneficiary affect total monthly family benefit. Earnings of dependent or survivor beneficiary affect only his or her benefit. However, effective January 1985, earnings of retired-worker beneficiary do not affect benefit to divorced spouse who has been divorced at least 2 years. Effective for benefits after December 1990, the 2-year requirement is waived, if the worker was entitled to benefits before the divorce.

<sup>2</sup> Monthly test for self-employment income is defined in terms of substantial services. For taxable years beginning after Dec. 31, 1977, monthly test eliminated for both wage and self-employment income except that each individual may use monthly test for 1 grace year, usually the year of retirement.

<sup>3</sup> Applied to self-employment income only.

<sup>4</sup> Special provisions for earnings in noncovered employment outside the United States.

<sup>5</sup> Became effective due to automatic adjustment provisions mandated by 1972 and 1973 legislation.

<sup>6</sup> Age 65 for beneficiaries who attain age 62 (age 60 for widows and widowers) before 2000, gradually increasing to age 67 for beneficiaries who attain age 62 in 2022 or later.

<sup>7</sup> Discretionary increase included in 1977 legislation.

<sup>8</sup> Actual amount is \$1,041.66 2/3.

<sup>9</sup> Actual amount is \$1,208.33 1/3.

<sup>10</sup> Actual amount is \$1,291.66 2/3.

<sup>11</sup> Public Law 106-182, enacted Apr. 7, 2000, eliminated the earnings test beginning with the month a beneficiary reaches full retirement age (FRA). The annual earnings test that applies in the year of attainment of FRA is based on the annual limits established under P.L. 104-121 (including the \$1 for \$3 withholding rate). In determining annual earnings for purposes of the annual earnings test under this legislation, only earnings before the month of attainment of FRA will be considered. Public Law 106-182 did not change the annual exempt amount for beneficiaries who are under FRA throughout the year, which continues to be pegged to increases in the average wage.

<sup>12</sup> Actual amount is \$1,416.66 2/3.

<sup>13</sup> Actual amount is \$2,083.33 1/3.

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

Table 2.A30.—Earnings guidelines<sup>1</sup> regarding substantial gainful activity (SGA), 1961–2001

Year	Average monthly amounts of earnings for—		
	Nonblind beneficiaries <sup>2</sup>		Blind beneficiaries <sup>3</sup>
	Maximum	Minimum	
1961–1965.....	\$100	\$50	(4)
1966–June 1968.....	125	75	(4)
July 1968–1973.....	140	90	(4)
1974–1975.....	200	130	(4)
1976.....	230	150	(4)
1977.....	240	160	(4)
1978.....	260	170	\$334
1979.....	280	180	375
1980.....	300	190	417
1981.....	300	190	459
1982.....	300	190	500
1983–1989.....	300	190	(5)
1990.....	500	300	780
1991.....	500	300	810
1992.....	500	300	850
1993.....	500	300	880
1994.....	500	300	930
1995.....	500	300	940
1996.....	500	300	960
1997.....	500	300	1,000
1998.....	500	300	1,050
January–June 1999.....	500	300	1,110
July 1999.....	700	300	1,110
January 2000.....	700	300	1,170
January 2001.....	<sup>6</sup> 740	300	<sup>7</sup> 1,240

<sup>1</sup> Earnings are net of any wage subsidies and impairment-related expenses. SGA guidelines for self-employed individuals differ from the guidelines for wage earners. Self-employment activity is generally examined in terms of time spent and degree of effort, as compared to that of nondisabled self-employed individuals.

<sup>2</sup> Earnings above the maximum amount ordinarily demonstrate SGA; earnings below the minimum amount show that SGA has not occurred. When earnings are between the minimum and maximum, other factors are considered.

<sup>3</sup> The 1977 amendments provided that, effective 1978, earnings of blind beneficiaries would be evaluated under different SGA guidelines than nonblind beneficiaries.

<sup>4</sup> Pre-1978 guidelines are the same as those applicable to nonblind beneficiaries.

<sup>5</sup> Annual amounts were determined by automatic adjustments linked to increases in average wage level. The amounts equal the monthly exempt amounts under the earnings test applicable to beneficiaries who have reached full retirement age (see table 2.A29—fourth column, third bank—for the 1983–1995 amounts).

<sup>6</sup> Computed as follows: Nonblind SGA amount for 2000, multiplied by the ratio of the 1999 national average wage index to the 1998 index. Rounding is to the nearest multiple of \$10. (Had this computation produced a lower SGA level than the 2000 level, the 2000 level would have been used.)

<sup>7</sup> Computed as follows: Blind SGA amount for 1994, multiplied by the ratio of the 1999 national average wage index to the 1992 index. Rounding is to the nearest multiple of \$10. (Had this computation produced a lower SGA level than the 2000 level, the 2000 level would have been used.)

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

Table 2.A31.—Taxation of Social Security benefits

Year enacted	Definition of income	Individuals or couples with income exceeding—	Benefits included in gross income	Effective for taxable years—
Married filing jointly				
1983 .....	Modified adjusted gross income, <sup>1</sup> plus 50 percent of Social Security and Tier 1 Railroad Retirement benefits <sup>2</sup>	\$32,000	Lesser of one-half of Social Security and Tier 1 Railroad Retirement benefits <sup>2</sup> or one-half of income over \$32,000	Ending after Dec. 31, 1983
1993 .....	Same as above	\$32,000 but not \$44,000	Same as above	Beginning after Dec. 31, 1993
		\$44,000	Lesser of 85 percent of Social Security and Tier 1 Railroad Retirement benefits <sup>2</sup> or the sum of \$6,000 plus 85 percent of income over \$44,000	
Married filing separate returns <sup>3</sup>				
1983 .....	Same as above	0	Lesser of one-half of Social Security and Tier 1 Railroad Retirement benefits <sup>2</sup> or one-half of income	Ending after Dec. 31, 1983
1993 .....	Same as above	0	Lesser of 85 percent of Social Security and Tier 1 Railroad Retirement benefits <sup>2</sup> or 85 percent of income	Beginning after Dec. 31, 1993
Individuals in all other filing categories				
1983 .....	Same as above	\$25,000	Lesser of one-half of Social Security and Tier 1 Railroad Retirement benefits <sup>2</sup> or one-half of income over \$25,000	Ending after Dec. 31, 1983
1993 .....	Same as above	\$25,000 but not \$34,000	Same as above	Beginning after Dec. 31, 1993
		\$34,000	Lesser of 85 percent of Social Security and Tier 1 Railroad Retirement benefits <sup>2</sup> or 85 percent of income over \$34,000	

<sup>1</sup> Adjusted gross income (before Social Security or Railroad Retirement benefits are considered), plus tax-exempt interest income, with further modification of adjusted gross income in some cases involving certain tax provisions of limited applicability among the beneficiary population.

<sup>2</sup> Includes workers' compensation benefits to the extent they cause a reduction in Social Security or Tier 1 Railroad Retirement disability benefits.

<sup>3</sup> Includes only married taxpayers filing separately who lived with their spouse at any time during the tax year; married individuals filing separately who did not live with their spouse are treated the same as unmarried individuals.

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

Table 2.A32.—Taxation of Social Security benefits: Examples

Modified adjusted gross income <sup>1</sup>	Amount of benefits <sup>2</sup>	One-half of benefits <sup>2</sup>	Income to be compared with base amount	Relevant base amount <sup>3</sup>	Income in excess of base amount	One-half of excess	85 percent of excess income	Lower of one-half of benefits, or one-half of income between upper and lower base amounts	85 percent of benefits	Taxable benefits included in gross income	
										If income does not exceed upper base amount—lesser of one-half of benefits or one-half of income over base amount	If income exceeds upper base amount—lesser of 85 percent of benefits or one-half of income between base amounts plus 85 percent of income over upper base amount
A	B	C	D = A + C	E	F = D - E	G = F / 2	H = .85 F	I	J = .85 B	K = lesser of C or G	L = lesser of J or I + H
Married filing jointly											
\$25,000.....	\$10,000	\$5,000	\$30,000	\$32,000	0	...	...	...	...	...	...
\$28,000.....	10,000	5,000	33,000	32,000	\$1,000	\$500	...	...	...	\$500	...
\$33,000.....	10,000	5,000	38,000	32,000	6,000	3,000	...	...	...	3,000	...
\$38,000.....	10,000	5,000	43,000	32,000	11,000	5,500	...	...	...	5,000	...
\$40,000.....	10,000	5,000	45,000	44,000	1,000	...	\$850	\$5,000	\$8,500	...	\$5,850
\$43,000.....	10,000	5,000	48,000	44,000	4,000	...	3,400	5,000	8,500	...	8,400
\$45,000.....	10,000	5,000	50,000	44,000	6,000	...	5,100	5,000	8,500	...	8,500
Married filing separate returns <sup>4</sup>											
0.....	\$6,000	\$3,000	\$3,000	0	\$3,000	...	\$2,550	0	\$5,100	...	\$2,550
\$2,000.....	6,000	3,000	5,000	0	5,000	...	4,250	0	5,100	...	4,250
\$4,000.....	6,000	3,000	7,000	0	7,000	...	5,950	0	5,100	...	5,100
\$10,000.....	6,000	3,000	13,000	0	13,000	...	11,050	0	5,100	...	5,100
\$20,000.....	6,000	3,000	23,000	0	23,000	...	19,550	0	5,100	...	5,100
Individuals in all other filing categories											
\$20,000.....	\$8,000	\$4,000	\$24,000	\$25,000	0	...	...	...	...	...	...
\$25,000.....	8,000	4,000	29,000	25,000	\$4,000	\$2,000	...	...	...	\$2,000	...
\$30,000.....	8,000	4,000	34,000	25,000	9,000	4,500	...	...	...	4,000	...
\$32,000.....	8,000	4,000	36,000	34,000	2,000	...	\$1,700	\$4,000	\$6,800	...	\$5,700
\$35,000.....	8,000	4,000	39,000	34,000	5,000	...	4,250	4,000	6,800	...	6,800
\$40,000.....	8,000	4,000	44,000	34,000	10,000	...	8,500	4,000	6,800	...	6,800

<sup>1</sup> Adjusted gross income (before Social Security or Railroad Retirement benefits are considered), plus tax-exempt interest income, with further modification of adjusted gross income in some cases involving certain tax provisions of limited applicability among the beneficiary population.

<sup>2</sup> Social Security and Tier 1 Railroad Retirement benefits, including workers' compensation benefits to the extent they cause a reduction in either of these two types of benefits.

<sup>3</sup> For married couples filing joint returns, up to 50 percent of benefits are subject to income tax if gross income is over \$32,000 but less than \$44,000. If gross income is less than \$32,000, none of the Social Security benefits will be taxable. If gross income exceeds \$44,000, up to 85 percent of Social Security benefits will be taxable income. Similar lower and upper level thresholds or "base amounts" for single individuals are \$25,000 and \$34,000. There is no similar threshold or base amount for married individuals who live together but file separate returns (for example, up to 85 percent of Social Security benefits in those cases may be considered taxable income).

<sup>4</sup> Includes only married taxpayers filing separately who lived with their spouse at any time during the tax year; married individuals filing separately who did not live with their spouse are treated the same as unmarried individuals.



Table 2.B1.—Federal benefit rates

Act	Living arrangement <sup>1</sup>	Amount <sup>2</sup>		Condition
		Individual	Couple	
1972.....	Own household <sup>3</sup>	\$130.00	\$195.00	Was to be effective Jan. 1, 1974; superseded by 1973 provision.
1973.....	...	140.00	210.00	<i>Effective Jan. 1, 1974.</i>
1973.....	...	146.00	219.00	<i>Effective July 1, 1974.</i>
1974.....	...	...	...	Mechanism established for providing cost-of-living adjustments.
	...	157.70	236.60	<i>Effective July 1, 1975.</i>
	...	167.80	251.80	<i>Effective July 1, 1976.</i>
	...	177.70	266.70	<i>Effective July 1, 1977.</i>
	...	189.40	284.10	<i>Effective July 1, 1978.</i>
	...	208.20	312.30	<i>Effective July 1, 1979.</i>
	...	238.00	357.00	<i>Effective July 1, 1980.</i>
	...	264.70	397.00	<i>Effective July 1, 1981.</i>
	...	284.30	426.40	<i>Effective July 1, 1982.</i>
1983.....	...	304.30	456.40	<i>Effective July 1, 1983 (general benefit increase).</i>
	...	314.00	472.00	<i>Effective Jan. 1, 1984.</i>
	...	325.00	488.00	<i>Effective Jan. 1, 1985.</i>
	...	336.00	504.00	<i>Effective Jan. 1, 1986.</i>
	...	340.00	510.00	<i>Effective Jan. 1, 1987.</i>
	...	354.00	532.00	<i>Effective Jan. 1, 1988.</i>
	...	368.00	553.00	<i>Effective Jan. 1, 1989.</i>
	...	386.00	579.00	<i>Effective Jan. 1, 1990.</i>
	...	407.00	610.00	<i>Effective Jan. 1, 1991.</i>
	...	422.00	633.00	<i>Effective Jan. 1, 1992.</i>
	...	434.00	652.00	<i>Effective Jan. 1, 1993.</i>
	...	446.00	669.00	<i>Effective Jan. 1, 1994.</i>
	...	458.00	687.00	<i>Effective Jan. 1, 1995.</i>
	...	470.00	705.00	<i>Effective Jan. 1, 1996.</i>
	...	484.00	726.00	<i>Effective Jan. 1, 1997.</i>
	...	494.00	741.00	<i>Effective Jan. 1, 1998.</i>
	...	500.00	751.00	<i>Effective Jan. 1, 1999.</i>
	...	513.00	769.00	<i>Effective Jan. 1, 2000.</i>
	...	531.00	796.00	<i>Effective Jan. 1, 2001.</i>
1972.....	Receiving institutional care covered by Medicaid	25.00	50.00	<i>Effective Jan. 1, 1974.</i> Must be receiving more than 50 percent of the cost of the care from Medicaid (Title XIX of the Social Security Act).
1987.....	...	30.00	60.00	<i>Effective July 1, 1988.</i> Must be receiving more than 50 percent of the cost of the care from Medicaid (Title XIX of the Social Security Act).

<sup>1</sup> For those in another person's household receiving support and maintenance there, the federal benefit rate is reduced by one-third.

<sup>2</sup> For those without countable income. These payments are reduced by the amount of countable income of the individual or couple.

<sup>3</sup> Includes persons in private institutions whose care is not provided by Medicaid.

## 2.C Medicare: History of Provisions

Table 2.C1.—Medicare cost sharing and premium amounts, 1966–2001

Beginning <sup>1</sup> —	Hospital Insurance				Supplementary Medical Insurance					
	All expenses in "benefit period" covered except—				Monthly premium <sup>2</sup>	Annual deductible	Coinsurance (in percents)	Monthly premium		
	Inpatient hospital deductible (IHD) covers first 60 days	Inpatient hospital daily coinsurance		Skilled nursing facility daily coinsurance after 20 days (1/8 X IHD)				For enrollee (aged and disabled) <sup>3</sup>	Government amounts for—	
		Days 61 through 90 (1/4 X IHD)	Lifetime reserve days after 90 days (1/2 X IHD)						Aged	Disabled <sup>3</sup>
July:										
1966.....	\$40	\$10	(4)	(4)	...	\$50	20	\$3.00	\$3.00	...
1967.....	40	10	(4)	\$5.00	...	50	20	3.00	3.00	...
1968.....	40	10	20	5.00	...	<sup>5</sup> 50	<sup>5</sup> 20	<sup>6</sup> 4.00	<sup>6</sup> 4.00	...
1969.....	44	11	22	5.50	...	50	20	4.00	4.00	...
1970.....	52	13	26	6.50	...	50	20	5.30	5.30	...
1971.....	60	15	30	7.50	...	50	20	5.60	5.60	...
1972.....	68	17	34	8.50	...	50	<sup>7</sup> 20	5.80	5.80	...
1973.....	72	18	36	9.00	<sup>8</sup> \$33	60	20	<sup>8</sup> 6.30	6.30	\$22.70
1974.....	84	21	42	10.50	36	60	20	6.70	6.70	29.30
1975.....	92	23	46	11.50	40	60	20	6.70	8.30	30.30
1976.....	104	26	52	13.00	45	60	20	7.20	14.20	30.80
1977.....	124	31	62	15.50	54	60	20	7.70	16.90	42.30
1978.....	144	36	72	18.00	63	60	20	8.20	18.60	41.80
1979.....	160	40	80	20.00	69	60	20	8.70	18.10	41.30
1980.....	180	45	90	22.50	78	60	20	9.60	23.00	41.40
1981.....	204	51	102	25.50	89	<sup>9</sup> 10 60	<sup>10</sup> 20	11.00	34.20	62.20
1982.....	260	65	130	32.50	113	<sup>11</sup> 75	<sup>11</sup> 20	12.20	37.00	72.00
1983.....	304	76	152	38.00	113	75	20	12.20	41.80	80.00
January:										
1984.....	356	89	178	44.50	155	75	20	14.60	43.80	94.00
1985.....	400	100	200	50.00	174	75	20	15.50	46.50	89.90
1986.....	492	123	246	61.50	214	75	20	15.50	46.50	66.10
1987.....	520	130	260	65.00	226	75	20	17.90	53.70	88.10
1988.....	540	135	270	67.50	234	75	20	24.80	74.40	72.40
1989.....	<sup>12</sup> 560	(12)	(12)	<sup>13</sup> 25.50	156	75	20	<sup>14</sup> 31.90	83.70	40.70
1990.....	592	148	296	74.00	175	75	20	28.60	85.80	59.60
1991.....	628	157	314	78.50	177	100	20	29.90	95.30	82.10
1992.....	652	163	326	81.50	192	100	20	31.80	89.80	129.80
1993.....	676	169	338	84.50	221	100	20	36.60	104.40	129.20
1994.....	696	174	348	87.00	<sup>15</sup> 245	100	20	41.10	82.50	111.10
1995.....	716	179	358	89.50	<sup>15</sup> 261	100	20	46.10	100.10	165.50
1996.....	736	184	368	92.00	<sup>15</sup> 289	100	20	42.50	127.30	167.70
1997.....	760	190	380	95.00	<sup>15</sup> 311	100	20	43.80	131.40	177.00
1998.....	764	191	382	95.50	<sup>15</sup> 309	100	20	43.80	132.00	150.40
1999.....	768	192	384	96.00	<sup>15</sup> 309	100	20	45.50	139.10	160.50
2000.....	776	194	388	97.00	<sup>15</sup> 301	100	20	45.50	138.30	196.70
2001.....	792	198	396	99.00	<sup>15</sup> 300	100	20	50.00	152.00	214.40

<sup>1</sup> The HI and SMI deductible and coinsurance amounts begin in January unless otherwise noted. The HI and SMI monthly premium amounts were effective in July through 1983. Monthly premium amounts begin in January in 1984 and succeeding years.

<sup>2</sup> Premium paid for voluntary participation of individuals aged 65 or older not otherwise entitled to Hospital Insurance and of certain disabled individuals who have exhausted other entitlement.

<sup>3</sup> Beginning in July 1973 for the disabled.

<sup>4</sup> Benefit not provided.

<sup>5</sup> Professional inpatient services of pathologists and radiologists not subject to deductible or coinsurance, beginning in April 1968.

<sup>6</sup> Beginning in April 1968.

<sup>7</sup> Home health services not subject to coinsurance, beginning in January 1973.

<sup>8</sup> Monthly premium for July and August 1973 was reduced to \$5.80 and \$6.10, respectively, by the Cost of Living Council.

<sup>9</sup> Home health services not subjected to deductible.

<sup>10</sup> Same as footnote 5, but only when physician accepts assignment.

<sup>11</sup> Effective Oct. 1, 1982 professional inpatient services of pathologists and radiologists are subject to deductible and coinsurance.

<sup>12</sup> Unlike all other years, the 1989 deductible was applied on an annual, rather than a benefit period, basis. Once the deductible was paid by the beneficiary, Medicare paid the balance of expenses for covered hospital services, regardless of the number of days of hospitalization (except for psychiatric hospital care, which was still limited by the 190-day lifetime maximum).

<sup>13</sup> The coinsurance amount in 1989 was equal to 20 percent of the estimated national average daily cost of covered skilled nursing facility care, rather than 1/8 of the inpatient hospital deductible. The beneficiary paid the coinsurance amount for the first 8 days of care in 1989, rather than for days of care 21 to 100 in a benefit period as in all other years. Skilled nursing facility benefits were available for up to 150 days of care per year in 1989, rather than for up to 100 days of care per benefit period as in all other years.

<sup>14</sup> Includes the standard monthly SMI premium and a supplemental monthly flat premium under the Medicare Catastrophic Coverage Act of 1988. Amount shown is for most Part B enrollees. Residents of Puerto Rico and other territories and commonwealths, as well as persons enrolled in Part B only, paid different supplemental flat premiums resulting in a smaller premium than that shown.

<sup>15</sup> A reduced premium is available to individuals aged 65 or older who are not otherwise entitled to HI but who have (or who were married to, widowed, or divorced from a spouse for certain periods of time who has or had) at least 30 quarters of Social Security coverage. The reduced premium is \$184, \$183, \$188, \$187, \$170, \$170, \$166, and \$165, for 1994 to 2001, respectively.

CONTACT: Rita L. DiSimone/Barbara Klees (202) 358-6221/ (410) 786-6388 for further information.

Table 2.C2.—Federal medical assistance percentage and enhanced federal medical assistance percentage

State	Federal medical assistance percentage <sup>1</sup>			Enhanced federal medical assistance percentage <sup>2</sup>	
	2000 <sup>3</sup>	2001 <sup>4</sup>	2002 <sup>5</sup>	2001	2002
Alabama.....	69.57	69.99	70.45	78.99	79.32
Alaska.....	<sup>6</sup> 59.80	<sup>6</sup> 56.04	<sup>6</sup> 53.01	<sup>6</sup> 69.23	<sup>6</sup> 67.11
Arizona.....	65.92	65.77	64.98	76.04	75.49
Arkansas.....	72.85	73.02	72.64	81.11	80.85
California.....	51.67	51.25	51.40	65.88	65.98
Colorado.....	50.00	50.00	50.00	65.00	65.00
Connecticut.....	50.00	50.00	50.00	65.00	65.00
Delaware.....	50.00	50.00	50.00	65.00	65.00
District of Columbia.....	<sup>6</sup> 70.00	<sup>6</sup> 70.00	<sup>6</sup> 70.00	<sup>6</sup> 79.00	<sup>6</sup> 79.00
Florida.....	56.52	56.62	56.43	69.63	69.50
Georgia.....	59.88	59.67	59.00	71.77	71.30
Hawaii.....	51.01	53.85	56.34	67.70	69.44
Idaho.....	70.15	70.76	71.02	79.53	79.71
Illinois.....	50.00	50.00	50.00	65.00	65.00
Indiana.....	61.74	62.04	62.04	73.43	73.43
Iowa.....	63.06	62.67	62.86	73.87	74.00
Kansas.....	60.03	59.85	60.20	71.90	72.14
Kentucky.....	70.55	70.39	69.94	79.27	78.96
Louisiana.....	70.32	70.53	70.30	79.37	79.21
Maine.....	66.22	66.12	66.58	76.28	76.61
Maryland.....	50.00	50.00	50.00	65.00	65.00
Massachusetts.....	50.00	50.00	50.00	65.00	65.00
Michigan.....	55.11	56.18	56.36	69.33	69.45
Minnesota.....	51.48	51.11	50.00	65.78	65.00
Mississippi.....	76.80	76.82	76.09	83.77	83.26
Missouri.....	60.51	61.03	61.06	72.72	72.74
Montana.....	72.30	73.04	72.83	81.13	80.98
Nebraska.....	60.88	60.38	59.55	72.27	71.69
Nevada.....	50.00	50.36	50.00	65.25	65.00
New Hampshire.....	50.00	50.00	50.00	65.00	65.00
New Jersey.....	50.00	50.00	50.00	65.00	65.00
New Mexico.....	73.32	73.80	73.04	81.66	81.13
New York.....	50.00	50.00	50.00	65.00	65.00
North Carolina.....	62.49	62.47	61.46	73.73	73.02
North Dakota.....	70.42	69.99	69.87	78.99	78.91
Ohio.....	58.67	59.03	58.78	71.32	71.15
Oklahoma.....	71.09	71.24	70.43	79.87	79.30
Oregon.....	59.96	60.00	59.20	72.00	71.44
Pennsylvania.....	53.82	53.62	54.65	67.53	68.26
Rhode Island.....	53.77	53.79	52.45	67.65	66.72
South Carolina.....	69.95	70.44	69.34	79.31	78.54
South Dakota.....	68.72	68.31	65.93	77.82	76.15
Tennessee.....	63.10	63.79	63.64	74.65	74.55
Texas.....	61.36	60.57	60.17	72.40	72.12
Utah.....	71.55	71.44	70.00	80.01	79.00
Vermont.....	62.24	62.40	63.06	73.68	74.14
Virginia.....	51.67	51.85	51.45	66.30	66.02
Washington.....	51.83	50.70	50.37	65.49	65.26
West Virginia.....	74.78	75.34	75.27	82.74	82.69
Wisconsin.....	58.78	59.29	58.57	71.50	71.00
Wyoming.....	64.04	64.60	61.97	75.22	73.38
Outlying areas:					
American Samoa.....	<sup>7</sup> 50.00	<sup>7</sup> 50.00	<sup>7</sup> 50.00	<sup>7</sup> 65.00	<sup>7</sup> 65.00
Guam.....	<sup>7</sup> 50.00	<sup>7</sup> 50.00	<sup>7</sup> 50.00	<sup>7</sup> 65.00	<sup>7</sup> 65.00
Northern Mariana Islands.....	<sup>7</sup> 50.00	<sup>7</sup> 50.00	<sup>7</sup> 50.00	<sup>7</sup> 65.00	<sup>7</sup> 65.00
Puerto Rico.....	<sup>7</sup> 50.00	<sup>7</sup> 50.00	<sup>7</sup> 50.00	<sup>7</sup> 65.00	<sup>7</sup> 65.00
Virgin Islands.....	<sup>7</sup> 50.00	<sup>7</sup> 50.00	<sup>7</sup> 50.00	<sup>7</sup> 65.00	<sup>7</sup> 65.00

<sup>1</sup> Section 1905 (b) of the Social Security Act specifies the method to be used to compute the federal medical assistance percentage. From this section the following formula is derived:

N = 3-year average national per capita personal income

S = 3-year average state per capita personal income

Federal medical assistance percentage:

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

Federal share = 100 - state share with 50–83% limits.

<sup>2</sup> This is the title XXI enhanced federal medical assistance percentage rate specified in section 2105(b) of the act. The enhanced federal medical assistance percentage is limited to no more than 85%.

<sup>3</sup> Effective Oct. 1, 1997, through Sept. 30, 1998.

<sup>4</sup> Effective Oct. 1, 1998, through Sept. 30, 1999.

<sup>5</sup> Effective Oct. 1, 2000, through Sept. 30, 2001.

<sup>6</sup> For 1998, 1999, and 2000, the values in the table were set for state plans under titles XIX and XXI and for capitation payments and disproportionate share hospital allotments under those titles. For other purposes, the percentage for Alaska is 52.26 and for the District of Columbia 50%.

<sup>7</sup> For purposes of section 1118 of the Social Security Act, the federal medical assistance percentage used under titles I, X, XIV, and XVI, and part A of title IV will be 75%.

CONTACT: Gene Moyer (202) 690-7861 for further information.

## 2.F Administrative Data: Offices and Staff

Table 2.F1.—Number of SSA offices, 2000

Organization	Number
SSA headquarters (Baltimore, Maryland) .....	1
Regional offices <sup>1</sup> .....	10
Field offices <sup>2</sup> .....	1,340
Level 1 .....	567
Level 2 .....	721
Resident stations .....	52
Teleservice centers .....	36
Program service centers <sup>3</sup> .....	6
Data operations centers <sup>4</sup> .....	1
Office of Hearings and Appeals:	
Headquarters (Falls Church, Virginia) .....	1
Regional offices .....	10
Hearing offices .....	139
Satellite offices .....	4

<sup>1</sup> Regional offices are located in Boston, MA; New York, NY; Philadelphia, PA; Atlanta, GA; Chicago, IL; Dallas, TX; Kansas City, MO; Denver, CO; San Francisco, CA; and Seattle, WA.

<sup>2</sup> In December 1997, the field offices were redesignated as Level 1, 2, or resident stations depending on the characteristics of the facility, service area, and other conditions.

<sup>3</sup> Program service centers are located in Jamaica, NY; Philadelphia, PA; Birmingham, AL; Chicago, IL; Kansas City, MO; and Richmond, CA.

<sup>4</sup> The data operations center is located in Wilkes-Barre, PA.

Table 2.F2.—Number and percentage of SSA employees, by grade, September 30, 2000<sup>1</sup>

Employees	Total	GS 1-4	GS 5-8	GS 9-12	GS13-15	SES
Total number <sup>2</sup> .....	61,038	1,616	20,428	32,079	6,915	127
Percent:						
Women .....	72.2	78.5	82.5	70.9	45.7	38.5
All minorities .....	40.9	45.1	54.5	35.8	23.4	35.4
Black .....	27.1	32.3	35.3	24.3	15.7	22.8
Hispanic .....	10.2	9.2	14.8	8.5	4.8	10.2
Asian or Pacific Islander .....	2.6	2.8	3.4	2.3	1.9	1.6
American Indian or Alaskan Native .....	1.0	.8	1.3	.7	1.0	.8
Employees with severe disabilities .....	2.3	10.3	3.8	1.2	.8	.8

<sup>1</sup> Data from SSA's Affirmative Employment Plan.

<sup>2</sup> Includes all full-time and part-time permanent employees.

Table 2.F3.—Number of work years, fiscal years 1991–2000

Year	Full-time permanent staff <sup>1</sup>	Total work years <sup>2</sup>
1991 .....	63,715	66,040
1992 .....	62,398	68,135
1993 .....	61,640	66,623
1994 .....	62,434	66,741
1995 <sup>3</sup> .....	62,504	67,063
1996 .....	62,133	66,726
1997 .....	61,224	69,378
1998 .....	59,943	67,210
1999 .....	59,752	66,459
2000 .....	60,434	65,521

<sup>1</sup> On duty at end of fiscal year; includes seasonal employees.

<sup>2</sup> Includes full-time, part-time, and temporary employees; employees in special programs; and overtime hours worked.

<sup>3</sup> Includes 1,055 positions that were transferred from the Department of Health and Human Services to SSA when SSA became an independent agency (under P.L. 103-296, effective Mar. 31, 1995).

CONTACTS: Table 2.F1, Harold Atkins (410) 965-2367; table 2.F2, Nelson Izquierdo (410) 965-4364; and table 2.F3, Donna Frocke (410) 965-3094 for further information.

Table 2.F4.—Old-Age and Survivors Insurance, fiscal year 2000

[Numbers in thousands]

Workload	Number of claims		
	Total	Worker	Family members and survivors
Beginning-of-year pending.....	53.1	23.3	29.8
Received.....	3,356.2	1,869.7	1,486.5
Processed <sup>1</sup> .....	3,379.9	1,876.5	1,503.4
End-of-year pending.....	29.3	16.5	12.8

<sup>1</sup> See table 6.A1 for data on number of awards.

Source: Office of Information Management, Office of Systems, District Office Workload Report (DOWR).

Table 2.F5.—Disability Insurance, fiscal year 2000

[Numbers in thousands]

Workload	Number of claims		
	Total	Worker	Family members and survivors
Beginning-of-year pending.....	321.2	307.1	14.1
Received.....	1,595.6	1,376.5	219.1
Processed <sup>1</sup> .....	1,574.7	1,346.2	228.5
End-of-year pending.....	341.9	337.3	4.6

<sup>1</sup> See table 6.A1 for data on number of awards.

Source: Office of Information Management, Office of Systems, DOWR.

Table 2.F6.—Supplemental Security Income, fiscal year 2000

[Numbers in thousands]

Workload	Number of claims		
	Total	Aged	Blind/disabled
Beginning-of-year pending.....	365.7	7.5	358.2
Received.....	1,699.60	153.5	1,546.1
Processed <sup>1</sup> .....	1,645.60	153.4	1,492.2
End-of-year pending.....	419.7	7.6	412.1

<sup>1</sup> See table 7.A8 for data on number of awards.

Source: Office of Information Management, Office of Systems, DOWR.

## 2.F Administrative Data: Service Delivery

Table 2.F7.—Accuracy rates and use of 800 telephone number, fiscal years 1995–2000

Item	1996	1997	1998	1999	2000
<b>Accuracy rates (in percents)</b>					
OASI payments:					
Index of dollar accuracy .....	99.7	99.8	99.8	99.6	(1)
Post-entitlement payment change accuracy <sup>2</sup> .....	98.4	98.0	98.5	<sup>3</sup> 98.6	(1)
Payment review/stewardship results:					
Excess payments .....	99.8	99.9	99.9	99.8	(1)
Underpayments .....	99.8	99.9	99.9	99.9	(1)
SSI payments: <sup>4</sup>					
Index of dollar accuracy <sup>5</sup> .....	93.4	93.0	93.9	94.2	(1)
Post-eligibility .....	(1)	(1)	(1)	(1)	(1)
Payment review/stewardship results:					
Excess payments .....	94.5	94.7	93.5	94.3	(1)
Underpayments .....	98.8	98.9	98.8	98.3	(1)
Disability Insurance benefits: <sup>6</sup>					
Initial claims .....	94.5	94.0	93.7	94.3	94.2
Allowances .....	96.5	95.9	96.1	96.5	97.0
Denials .....	93.6	93.1	92.3	93.0	92.4
Reconsideration .....	92.7	92.3	91.6	92.3	92.2
Reversals of denials .....	95.6	94.0	95.6	96.0	96.9
Affirmations of denials .....	92.3	92.0	90.9	91.6	91.3
<b>National 800 number network (1-800-772-1213)</b>					
Calls received (number in millions) .....	62.5	75.3	78.9	78.7	76.3
Average speed calls answered (in minutes) .....	3.0	1.9	2.7	2.0	2.5

<sup>1</sup> Data not available.

<sup>2</sup> Represents calendar year data.

<sup>3</sup> Preliminary data.

<sup>4</sup> Excludes determinations of disability.

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

<sup>6</sup> Represents cases free of decisional and documentation errors.

**2.F Administrative Data: Hearings and Appeals**

**Table 2.F8.—Workload of SSA's Administrative Law Judges (ALJs),<sup>1</sup> fiscal years 1999–2001**

Item	1999	2000	2001 <sup>2</sup>
Number of ALJs .....	1,107	989	954
Average monthly hearing dispositions per ALJ .....	38	42	46
Average hearings pending per ALJ .....	289	348	354

<sup>1</sup> Excludes Regional Chief ALJs; based on average number of ALJs available during fiscal year 2000.

<sup>2</sup> Estimated data.

**Table 2.F9.—Number of hearing receipts, dispositions, and end-of-year pending cases, fiscal years 2000–2001**

Program	Hearing receipts		Hearing dispositions		End-of-year pending cases	
	2000	2001	2000	2001	2000	2001
Total <sup>1</sup> .....	569,276	557,422	539,426	525,636	346,756	378,542
OASI .....	3,419	3,345	3,220	3,154	2,554	2,745
Disability:						
DI .....	185,375	181,491	163,856	159,736	110,459	132,214
SSI .....	161,844	158,475	154,354	150,384	106,162	114,253
DI/SSI .....	140,758	137,850	129,905	126,573	91,673	102,950
Medicare (Parts A and B and adversarial) .....	77,872	76,255	88,084	85,783	35,904	26,376
Black Lung .....	8	6	7	6	4	4

<sup>1</sup> Data estimated for 2001.

**Table 2.F10.—Number of civil litigation cases, fiscal year 2000**

Program	New cases	Court decisions <sup>1</sup>	Affirmations	Reversals	Dismissals	End-of-year pending cases
Total .....	14,747	12,173	4,799	746	801	26,366
OASI .....	109	160	67	12	26	244
Disability:						
DI .....	5,468	4,558	1,847	332	271	9,804
SSI .....	4,217	3,191	1,210	157	256	7,199
DI/SSI .....	4,922	4,262	1,675	245	246	9,090
SSI nondisability .....	9	6	0	0	2	29
Black Lung .....	0	0	0	0	0	0

<sup>1</sup> Includes 5,827 remands that may not be a final court decision.

**Table 2.F11.—Number of SSA Appeals Council cases, fiscal years 1999–2001**

Cases	1999	2000	2001 <sup>1</sup>
Beginning-of-year pending .....	120,548	146,564	127,190
Receipts .....	115,150	100,950	91,370
Dispositions .....	91,173	134,191	128,580
End-of-year pending .....	144,525	113,323	89,980

<sup>1</sup> Estimated data.

### 3.A Social Welfare Expenditures

Table 3.A1.—Gross domestic product and social welfare expenditures under public programs, fiscal years 1965–1995 <sup>1</sup>

Item	1965	1970	1975	1980	1985	1990 <sup>2</sup>	1992 <sup>2</sup>	1993 <sup>2</sup>	1994 <sup>2</sup>	1995
	Amount (in millions)									
Gross domestic product.....	\$701,000	\$1,023,100	\$1,590,800	\$2,718,900	\$4,108,000	\$5,682,900	\$6,149,300	\$6,476,600	\$6,837,100	\$7,186,900
Total social welfare expenditures <sup>3</sup> .....	77,084	145,979	288,967	492,213	731,840	1,048,951	1,266,504	1,366,743	1,435,714	1,505,136
Social insurance.....	28,123	54,691	123,013	229,754	369,595	513,822	618,938	659,210	683,779	705,483
Public aid.....	6,283	16,488	41,447	72,703	98,362	146,811	207,953	221,000	238,025	253,530
Health and medical programs.....	6,155	10,030	16,535	26,762	38,643	61,684	70,143	74,706	80,130	85,507
Veterans' programs.....	6,031	9,078	17,019	21,466	27,042	30,916	35,642	36,378	37,895	39,072
Education.....	28,108	50,846	80,834	121,050	172,048	258,332	292,145	331,997	344,091	365,625
Housing.....	318	701	3,172	6,879	12,598	19,468	20,151	20,782	27,032	29,361
Other social welfare.....	2,066	4,145	6,947	13,599	13,552	17,918	21,532	22,670	24,762	26,558
All health and medical care <sup>4</sup> .....	9,302	24,801	51,022	99,145	170,665	274,472	353,174	381,710	408,780	435,075
	As percent of gross domestic product									
Gross domestic product.....	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0
Total social welfare expenditures.....	11.0	14.3	18.2	18.1	17.8	18.5	20.6	21.1	21.0	20.9
Social insurance.....	4.0	5.3	7.7	8.5	9.0	9.0	10.1	10.2	10.0	9.8
Public aid.....	.9	1.6	2.6	2.7	2.4	2.6	3.4	3.4	3.5	3.5
Health and medical programs.....	.9	1.0	1.0	1.0	.9	1.1	1.1	1.2	1.2	1.2
Veterans' programs.....	.9	.9	1.1	.8	.7	.5	.6	.6	.6	.5
Education.....	4.0	5.0	5.1	4.5	4.2	4.5	4.8	5.1	5.0	5.1
Housing.....	(5)	.1	.2	.3	.3	.3	.3	.3	.4	.4
Other social welfare.....	.3	.4	.4	.5	.3	.3	.4	.4	.4	.4
All health and medical care.....	1.3	2.4	3.2	3.6	4.2	4.8	5.7	5.9	6.0	6.1

<sup>1</sup> Through 1976, fiscal year ended June 30 for federal government, most states, and some localities. Beginning in 1977, federal fiscal year ended Sept. 30.

<sup>2</sup> Revised data.

<sup>3</sup> Represents program and administrative expenditures from federal, state and local public revenues and trust funds under public law. Includes workers' compensation and temporary disability insurance payments made through private carriers and self-insurers. Includes capital outlay and some expenditures abroad.

<sup>4</sup> Combines "health and medical programs" with medical services provided in connection with social insurance, public aid, veterans', and "other social welfare" categories.

<sup>5</sup> Less than 0.05 percent.

Source: Gross domestic product data from Department of Commerce, *Survey of Current Business*. GDP figures revised in 1996 to reflect changes in the source data. Social welfare expenditures data taken or estimated from *Federal Budgets*, *Census of Governments*, and reports of administering agencies. See table 3.A3 for components of individual categories.

**The series Social Welfare Expenditures Under Public Programs in the United States is undergoing review and revision. Current data should be available beginning 2002.**

CONTACT: Martynas Ycas (202) 358-6215 for further information.



Table 3.A3.—Social welfare expenditures under public programs, fiscal years 1965–1995 <sup>1</sup>  
[In millions]

Item	1965	1970	1975	1980	1985	1990 <sup>2</sup>	1992 <sup>2</sup>	1993 <sup>2</sup>	1994 <sup>2</sup>	1995
Total .....	\$77,058.0	\$145,979.2	\$288,966.0	\$492,212.7	\$731,840.1	\$1,048,950.8	\$1,266,502.8	\$1,366,743.1	\$1,435,714.3	\$1,505,136.4
Social insurance .....	28,122.8	54,691.2	123,013.1	229,754.4	369,595.2	513,821.8	618,938.1	659,209.9	683,778.7	705,483.3
OASDHI <sup>3</sup> .....	16,997.5	36,835.4	78,429.9	152,110.4	257,535.1	355,264.5	416,564.0	449,276.8	477,339.7	496,355.8
Health Insurance (Medicare) <sup>4</sup> .....	..	7,149.0	14,781.4	34,991.5	71,384.3	109,709.0	132,246.3	148,093.5	161,392.7	164,713.3
Railroad Retirement <sup>3</sup> .....	1,128.1	1,609.9	3,085.1	4,768.7	6,275.6	7,229.9	7,737.1	7,920.6	8,025.2	8,106.2
Public employee retirement <sup>5</sup> .....	4,528.5	8,658.7	20,118.6	39,490.2	63,044.0	90,391.2	103,698.7	112,559.5	119,253.1	128,001.8
Unemployment insurance and employment service <sup>6</sup> .....	3,002.6	3,819.5	13,835.9	18,326.4	18,343.8	19,973.7	41,166.0	40,720.8	31,251.1	26,302.0
Railroad unemployment insurance .....	76.7	38.5	41.6	155.4	138.4	64.6	67.4	60.3	53.5	48.4
Railroad temporary disability insurance .....	46.5	61.1	32.9	68.7	50.6	40.3	27.5	25.9	29.3	30.0
State temporary disability insurance <sup>7</sup> .....	483.5	717.7	990.0	1,377.4	1,944.1	3,224.2	4,009.4	3,316.0	3,200.8	3,189.1
Workers' compensation <sup>8</sup> .....	1,859.4	2,950.4	6,479.1	13,457.2	22,263.6	37,633.4	45,668.0	45,330.0	44,626.0	43,450.0
Public aid .....	6,283.5	16,487.8	41,446.6	72,703.1	98,361.8	146,811.1	207,953.0	220,999.8	238,025.3	253,530.0
Public assistance <sup>9</sup> .....	5,874.9	14,433.5	27,409.4	45,064.3	66,170.2	105,093.8	152,018.2	160,625.0	171,755.1	187,219.0
Supplemental Security Income <sup>10</sup> .....	..	..	6,091.6	8,226.5	11,840.0	17,230.4	23,423.2	26,506.2	30,085.5	30,138.0
Food Stamps .....	35.6	577.0	4,693.9	9,083.3	12,512.7	16,254.5	23,232.9	24,496.7	25,273.6	25,319.0
Other <sup>11</sup> .....	373.0	1,477.3	3,251.7	10,329.0	7,838.9	8,232.4	9,278.7	9,371.9	10,911.1	10,854.0
Health and medical programs <sup>12</sup> .....	6,129.0	10,030.0	16,535.0	26,762.0	38,643.0	61,684.0	70,143.0	74,706.0	80,130.0	85,507.0
Hospital and medical care <sup>13</sup> .....	3,391.0	5,407.0	8,729.0	12,286.0	16,373.0	25,971.0	28,697.0	30,617.0	31,562.0	31,904.0
Maternal and child health program <sup>14</sup> .....	239.0	450.0	567.0	870.0	1,222.0	1,865.0	2,106.0	2,185.0	2,272.0	2,348.0
Medical research .....	1,227.0	1,684.0	2,648.0	4,924.0	6,903.0	10,848.0	12,599.0	12,779.0	13,988.0	14,982.0
School health (education agencies) .....	140.0	247.0	352.0	575.0	790.0	1,113.0	1,230.0	1,309.0	1,384.0	1,667.0
Other public health activities .....	614.0	1,312.0	2,727.0	6,484.0	11,223.0	19,354.0	22,976.0	24,772.0	27,685.0	30,808.0
Medical facilities construction .....	518.0	930.0	1,512.0	1,623.0	2,132.0	2,533.0	2,535.0	3,044.0	3,239.0	3,798.0
Veterans' programs .....	6,031.1	9,078.1	17,018.9	21,465.5	27,042.3	30,916.2	35,642.0	36,378.3	37,894.8	39,072.0
Pensions and compensation <sup>15</sup> .....	4,141.4	5,393.8	7,578.5	11,306.0	14,333.0	15,792.6	16,539.3	17,205.2	17,481.0	18,070.4
Health and medical programs .....	1,228.7	1,784.1	3,516.8	6,203.9	9,493.2	12,004.1	15,442.0	15,410.5	16,231.4	16,654.4
Education .....	40.9	1,018.5	4,433.8	2,400.7	1,170.8	522.8	772.0	937.7	1,098.3	1,118.2
Life insurance <sup>16</sup> .....	434.3	502.3	556.1	664.5	795.5	1,037.8	1,113.7	904.7	971.5	946.3
Welfare and other .....	185.8	379.4	933.7	890.4	1,249.8	1,558.9	1,775.0	1,920.2	2,112.6	2,282.7
Education .....	28,107.8	50,845.5	80,834.1	121,049.6	172,047.5	258,331.6	292,144.6	331,996.8	344,091.0	365,625.3
Housing .....	318.1	701.2	3,171.7	6,879.0	12,598.5	19,468.5	20,150.6	20,782.3	27,032.0	29,361.1
Other social welfare .....	2,065.7	4,145.4	6,946.6	13,599.1	13,551.8	17,917.6	21,531.5	22,670.0	24,762.5	26,557.7
Vocational rehabilitation <sup>17</sup> .....	210.5	703.8	1,036.4	1,251.1	1,536.7	2,126.6	2,446.8	2,379.1	2,560.1	2,630.3
Institutional care <sup>18</sup> .....	789.5	201.8	296.1	482.4	379.6	629.4	684.4	721.5	783.1	874.0
Child nutrition programs <sup>19</sup> .....	617.4	896.0	2,517.6	4,852.3	5,308.5	7,165.4	8,775.8	9,392.4	10,099.1	10,653.4
Child welfare <sup>20</sup> .....	354.3	585.4	597.0	800.0	200.0	252.6	273.9	294.6	294.6	292.0
Special OEO and ACTION programs <sup>21</sup> ..	51.7	752.8	638.3	2,302.7	503.8	169.4	193.8	208.3	204.4	222.0
Social welfare, not elsewhere classified <sup>22</sup> .....	42.3	1,005.6	1,861.2	3,910.6	5,623.2	7,574.2	9,156.8	9,674.1	10,821.2	11,886.0

<sup>1</sup> Expenditures from federal, state, and local revenues and trust funds under public law; includes capital outlays and administrative expenditures unless otherwise noted. Includes some payments abroad. Through 1976, fiscal year ended June 30 for federal government, most states, and some localities; for federal government, beginning in 1977, fiscal year ends Sept. 30.

<sup>2</sup> Revised data.

<sup>3</sup> Excludes financial interchange between OASDI and Railroad Retirement.

<sup>4</sup> Hospital Insurance and Supplementary Medical Insurance. Included in total shown directly above.

<sup>5</sup> Excludes refunds of employee contributions; includes payments to retired military personnel and survivors. Administrative expenses for federal noncontributory retirement not available.

<sup>6</sup> Includes unemployment compensation under state programs, programs for federal military and civilian employees and trade adjustment and cash training allowances, and payments under extended, emergency, disaster, and special unemployment insurance programs.

<sup>7</sup> Cash and medical benefits in five areas; includes private plans where applicable and state costs of administering state plans and supervising private plans. Administrative expenses of private plans and all data for Hawaii not available.

<sup>8</sup> Cash and medical benefits paid under federal and state laws by private insurance carriers, state funds, and self-insurers. Beginning in 1959–60, includes Alaska and Hawaii. Administrative costs of private carriers and self-insurers not available. Beginning in 1969–70, includes federal "black lung" benefit program.

<sup>9</sup> Categorical cash and medical payments under the Social Security Act, and general assistance from state and local funds. Beginning in 1968–69, includes work-incentive activities.

<sup>10</sup> Income-maintenance payments began in Jan. 1974.

<sup>11</sup> Work relief, other emergency aid, surplus food for the needy, repatriate and refugee assistance, and work-experience training programs. Beginning 1974 includes WIC program. Beginning in 1981, includes Low-Income Home Energy Assistance.

<sup>12</sup> Excludes state and local expenditures for domiciliary care in institutions other than mental and tuberculosis, and services in connection with OASDI, state temporary disability insurance, workers' compensation, public assistance, vocational rehabilitation, and veterans' programs which are included in expenditures for these programs.

<sup>13</sup> Civilian and Department of Defense programs (including medical care provided to military dependents).

<sup>14</sup> Includes services for disabled children.

<sup>15</sup> Includes burial awards. Beginning in 1964–65, includes special allowances for survivors of veterans who did not qualify under OASDI. Beginning in 1973–74, subsistence payments to disabled veterans undergoing training shifted from the pensions and compensation to the education subgroup.

<sup>16</sup> Excludes the service persons' group life insurance program.

<sup>17</sup> Beginning in 1973–74, excludes administrative expenses.

<sup>18</sup> Federal expenditures represent primarily surplus food for institutions.

<sup>19</sup> Surplus food for schools and programs under National School Lunch and Child Nutrition Acts.

<sup>20</sup> Represents primarily child welfare services under the Social Security Act. Beginning in 1968–69, excludes administrative expenses.

<sup>21</sup> Includes domestic programs consolidated in 1971–72 under ACTION and special Office of Economic Opportunity programs. Beginning 1988, represents ACTION funds only.

<sup>22</sup> Federal expenditures include administrative and related expenses of the Secretary of Health and Human Services; Indian welfare and guidance, aging and juvenile delinquency, and certain manpower and human development activities. State and local expenditures include amounts for antipoverty and manpower programs, day care, child placement and adoption services, foster care, legal assistance, care of transients, and other unspecified welfare services; before 1969–70, these amounts were included with institutional care.

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

**The series Social Welfare Expenditures Under Public Programs in the United States is undergoing review and revision. Current data should be available beginning 2002.**

CONTACT: Martynas Ycas (202) 358-6215 for further information.

### 3.A Social Welfare Expenditures

Table 3.A4.—Private social welfare expenditures, by category and as a percent of gross domestic product (GDP), 1980–1994

[In millions]

Category	1980	1987	1988	1989	1990	1991	1992	1993	1994
Private social welfare expenditures .....	\$251,938	\$549,423	\$606,377	\$676,424	\$729,989	\$774,096	\$840,192	\$887,555	\$924,994
Health <sup>1</sup> .....	142,463	292,965	333,128	369,844	413,145	440,978	477,024	505,086	528,600
Personal health care.....	130,026	273,030	307,110	336,005	373,691	399,617	431,456	452,346	469,900
Income maintenance.....	53,519	143,359	148,533	166,885	164,397	170,307	186,655	194,119	204,736
Private pension payments .....	37,560	120,442	124,546	140,911	137,739	142,924	158,487	165,097	174,452
Life insurance .....	5,075	8,166	8,418	9,063	9,278	9,472	9,866	10,276	11,229
Short-term sickness and disability benefits ..	8,630	11,822	12,789	13,616	13,680	13,787	14,566	15,389	15,901
Long-term disability .....	1,282	2,293	2,295	2,892	2,926	3,172	3,143	2,900	2,895
Supplemental unemployment .....	972	636	485	403	774	952	593	457	259
Education <sup>2</sup> .....	33,180	65,498	72,137	80,383	87,864	93,813	100,491	107,451	105,361
Welfare and other services.....	22,776	47,601	52,579	59,312	64,583	68,998	76,022	80,899	86,297
Social welfare expenditures as a percent of GDP:									
Total <sup>3</sup> .....	27.4	29.1	29.2	29.6	31.3	32.9	34.3	34.8	34.5
Public <sup>4</sup> .....	18.6	18.7	18.5	18.5	18.5	19.8	20.6	21.1	21.8
Private <sup>5</sup> .....	9.3	11.7	12.0	12.4	12.8	13.2	13.6	13.7	13.5

<sup>1</sup> Includes program administration and net cost of health insurance, research, and construction of medical facilities.

<sup>2</sup> Includes construction.

<sup>3</sup> Represents sum of public and private expenditures as a percent of GDP, after adjustment for elimination of overlap. The overlap occurs when payments received under public or private income-maintenance programs are used to purchase medical care, educational services, or residential care.

<sup>4</sup> Represents fiscal year expenditures as a percent of federal fiscal year GDP.

<sup>5</sup> Represents calendar year expenditures as a percent of calendar year GDP.

**The series Social Welfare Expenditures Under Private Programs in the United States is undergoing review and revision. Current data should be available beginning 2002.**

CONTACT: Martynas Ycas (202) 358-6215 for further information.

Table 3.B3.—Federal minimum wage rates under the Fair Labor Standards Act and average hourly earnings and average weekly hours for production workers in manufacturing, 1938–2000

Effective date	Minimum hourly wage for workers in jobs first covered by—				Average for production workers in manufacturing <sup>1</sup>	
	1938 Act <sup>2</sup>	1961 amendments <sup>3</sup>	1966 and subsequent amendments <sup>4</sup>		Gross hourly earnings	Weekly hours
			Nonfarm	Farm		
October 24:						
1938 .....	\$0.25	...	...	...	\$0.62	35.6
1939 .....	.30	...	...	...	.63	37.7
1945 .....	.40	...	...	...	1.02	43.5
January 25, 1950 .....	.75	...	...	...	1.44	40.5
March 1, 1956 .....	1.00	...	...	...	1.95	40.4
September 3:						
1961 .....	1.15	\$1.00	...	...	2.32	39.8
1963 .....	1.25	1.00	...	...	2.46	40.5
1964 .....	1.25	1.15	...	...	2.53	40.7
1965 .....	1.25	1.25	...	...	2.61	41.2
February 1:						
1967 .....	1.40	1.40	\$1.00	\$1.00	2.83	40.6
1968 .....	1.60	1.60	1.15	1.15	3.01	40.7
1969 .....	1.60	1.60	1.30	1.30	3.19	40.6
1970 .....	1.60	1.60	1.45	1.30	3.36	39.8
1971 .....	1.60	1.60	1.60	1.30	3.57	39.9
May 1, 1974 .....	2.00	2.00	1.90	1.60	4.42	40.0
January 1:						
1975 .....	2.10	2.10	2.00	1.80	4.83	39.5
1976 .....	2.30	2.30	2.20	2.00	5.22	40.1
1977 .....	2.30	2.30	2.30	2.20	5.68	40.3
1978 .....	2.65	2.65	2.65	2.65	6.17	40.4
1979 .....	2.90	2.90	2.90	2.90	6.70	40.2
1980 .....	3.10	3.10	3.10	3.10	7.27	39.7
1981 .....	3.35	3.35	3.35	3.35	7.99	39.8
1982 .....	3.35	3.35	3.35	3.35	8.49	38.9
1983 .....	3.35	3.35	3.35	3.35	8.83	40.1
1984 .....	3.35	3.35	3.35	3.35	9.19	40.7
1985 .....	3.35	3.35	3.35	3.35	9.54	40.5
1986 .....	3.35	3.35	3.35	3.35	9.73	40.7
1987 .....	3.35	3.35	3.35	3.35	9.91	41.0
1988 .....	3.35	3.35	3.35	3.35	10.19	41.1
1989 .....	3.35	3.35	3.35	3.35	10.48	41.0
April 1:						
1990 <sup>5</sup> .....	3.80	3.80	3.80	3.80	10.83	40.8
1991 <sup>5</sup> .....	4.25	4.25	4.25	4.25	11.18	40.7
1992 <sup>5</sup> .....	4.25	4.25	4.25	4.25	11.46	41.0
1993 <sup>5</sup> .....	4.25	4.25	4.25	4.25	11.74	41.4
1994 .....	4.25	4.25	4.25	4.25	12.07	42.0
1995 .....	4.25	4.25	4.25	4.25	12.37	41.6
October 1, 1996 <sup>5</sup> .....	4.75	4.75	4.75	4.75	12.77	41.6
September 1, 1997 <sup>5</sup> .....	5.15	5.15	5.15	5.15	13.17	42.0
1998 <sup>5</sup> .....	5.15	5.15	5.15	5.15	13.49	41.7
1999 <sup>5</sup> .....	5.15	5.15	5.15	5.15	13.91	41.7
2000 <sup>5</sup> .....	5.15	5.15	5.15	5.15	14.38	41.6

<sup>1</sup> For year in which minimum wage rate changes were effective.

<sup>2</sup> The 1938 Act was applicable generally to employees engaged in interstate commerce or in the production of goods for interstate commerce.

<sup>3</sup> The 1961 amendments extended coverage primarily to employees in large retail and service trades as well as local transit, construction, and gasoline service station employees.

<sup>4</sup> The 1966 amendments extended coverage to state and local government employees of hospitals, nursing homes, and schools, and to employees of laundries, dry cleaners, large hotels and motels, restaurants, and farms. Subsequent amendments extended coverage to the remaining federal, state, and local employees not protected in 1966, to certain workers in retail and service trades previously exempted, and to certain domestic workers in private household employment.

<sup>5</sup> A training wage may be paid for a period of 90 days to an employee who has not attained age 20. The training wage was \$3.35 per hour effective Apr. 1, 1990 and \$3.61 per hour effective Apr. 1, 1991, through Mar. 31, 1993. Effective Oct. 1, 1996, the training wage is \$4.25 per hour.

### 3.C Interprogram Data

Table 3.C3.—Selected social insurance programs: Source of funds from contributions, 1965–2000

[In millions]

Program and source	1965	1970	1975	1980	1985	1990	1995	1996	1997	1998	1999	2000
<b>Social Security Trust Funds:</b>												
<b>Old-Age and Survivors</b>												
Insurance <sup>1</sup> .....	\$16,017	\$30,257	\$56,815	\$103,456	\$178,010	\$270,507	\$309,906	\$327,764	\$357,104	\$380,113	\$407,023	\$432,977
Employer.....	7,618	14,489	27,184	49,731	83,682	125,272	143,978	153,388	165,563	176,564	188,461	200,431
Employee.....	7,440	14,204	26,947	49,436	83,400	124,481	143,335	152,628	164,667	174,786	187,160	198,736
Self-employed.....	959	1,564	2,684	4,289	7,720	15,906	17,103	15,277	19,448	19,614	20,503	22,216
Taxation of benefits.....	...	...	...	...	3,208	4,848	5,490	6,471	7,426	9,149	10,899	11,594
<b>Disability Insurance<sup>1</sup></b>												
Employer.....	1,188	4,481	7,444	13,255	17,204	28,498	54,695	57,651	56,473	59,485	63,827	71,813
Employee.....	564	2,154	3,562	6,307	8,119	13,414	25,665	27,299	26,437	28,064	29,936	33,971
Self-employed.....	551	2,117	3,530	6,254	8,087	13,338	25,545	27,160	26,279	27,772	29,730	33,701
Taxation of benefits.....	73	210	352	694	776	1,602	3,144	2,819	3,287	3,091	3,500	3,420
<b>Medicare Trust Funds:</b>												
<b>Hospital Insurance<sup>1</sup></b>												
Employer.....	...	4,880	11,510	23,866	47,173	71,753	103,301	115,853	119,546	130,700	140,306	154,520
Employee.....	...	2,379	5,578	11,591	22,613	33,850	45,839	52,414	53,345	57,849	61,826	67,526
Self-employed.....	...	2,332	5,530	11,518	22,549	33,635	45,852	52,419	53,348	57,849	61,826	67,526
Voluntarily insured <sup>2</sup> .....	...	169	395	739	1,970	4,146	6,743	5,752	7,976	8,619	8,655	9,299
Taxation of benefits.....	...	...	7	18	41	122	954	1,199	1,319	1,316	1,447	1,382
<b>Supplementary Medical</b>												
Aged.....	...	1,096	1,917	3,011	5,613	11,319	19,717	18,763	19,289	20,932	18,966	20,556
Disabled.....	...	1,096	1,759	2,707	5,105	10,311	17,651	16,654	17,079	18,594	16,604	17,892
Railroad Retirement <sup>4</sup> .....	...	...	158	304	508	1,008	2,066	2,109	2,210	2,338	2,362	2,664
Railroad Retirement <sup>4</sup> .....	647	968	1,506	2,630	4,626	4,316	4,032	4,261	4,273	(5)	(5)	(5)
Employer.....	315	510	1,146	1,722	2,417	2,512	2,592	2,664	2,707	(5)	(5)	(5)
Employee.....	315	439	356	594	1,110	1,209	1,265	1,316	1,355	(5)	(5)	(5)
Self-employed.....	17	19	4	313	1,099	595	175	281	211	(5)	(5)	(5)
Federal Civil Service <sup>6</sup> .....	2,197	3,870	9,507	19,986	27,160	31,869	37,628	38,097	39,745	(5)	(5)	(5)
Employer.....	1,123	2,001	6,905	16,220	22,472	27,368	33,174	33,720	35,376	(5)	(5)	(5)
Employee.....	1,073	1,869	2,600	3,766	4,688	4,501	4,454	4,377	4,369	(5)	(5)	(5)
State and local government <sup>7</sup> ...	4,225	7,895	14,560	25,654	37,455	41,700	59,611	60,898	(5)	(5)	(5)	(5)
Employer.....	2,525	4,920	9,880	18,776	27,699	29,300	41,011	41,528	(5)	(5)	(5)	(5)
Employee.....	1,700	2,975	4,680	6,878	9,756	12,400	18,600	19,370	(5)	(5)	(5)	(5)

<sup>1</sup> For OASDI–HI contribution rates and wage base, see table 2.A3. Beginning in 1952 (1959 for DI, 1968 for HI) employer and employee contributions differ by estimated amount of refunds of employee tax overpayments and, beginning in 1966, by employee tax on tips. For SMI premium rates, see table 2.C1.

<sup>2</sup> Beginning in July 1973, aged ineligible may voluntarily enroll for HI.

<sup>3</sup> Includes premiums paid on behalf of eligibles by state governments under “buy-in” arrangements.

<sup>4</sup> Beginning in 1966, excludes HI contributions and includes employer contributions to supplemental benefit account.

<sup>5</sup> Data not available.

<sup>6</sup> Employer share represents federal and District of Columbia government contributions; employee share includes voluntary contributions to purchase additional annuity. Beginning in 1980, estimated by the Social Security Administration from fiscal year data.

<sup>7</sup> Estimated by Social Security Administration from U.S. Census Bureau fiscal year data. Employer share represents government contribution.

Table 3.C4.—Social Security and selected public assistance programs: Average monthly amount in current and 2000 dollars, 1950–2000

Period	Consumer Price Index, all items <sup>1</sup> (1982-84 = 100)	Average monthly Social Security benefit in current-payment status				Average monthly amount per recipient under—			
		Retired workers		Widowed mother or father and 2 children		Old-Age Assistance/ Supplemental Security Income <sup>2</sup>		Temporary Assistance for Needy Families <sup>3</sup>	
		Current dollars	2000 dollars	Current dollars	2000 dollars	Current dollars	2000 dollars	Current dollars	2000 dollars
December:									
1950	25.0	\$43.86	\$305.27	\$93.90	\$653.54	\$43.05	\$299.63	\$20.85	\$145.12
1951	26.5	42.14	276.69	93.80	615.89	44.55	292.52	22.00	144.45
1952	26.7	49.25	320.96	106.00	690.79	48.80	318.02	23.45	152.82
1953	26.9	51.10	330.54	111.90	723.81	48.90	316.30	23.20	150.07
1954	26.7	59.14	385.41	130.50	850.45	48.70	317.37	23.25	151.52
1955	26.8	61.90	401.89	135.40	879.09	50.05	324.95	23.50	152.57
1956	27.6	63.09	397.74	141.00	888.91	53.25	335.71	24.80	156.35
1957	28.4	64.58	395.67	146.30	896.35	55.50	340.04	25.40	155.62
1958	28.9	66.35	399.48	151.70	913.35	56.95	342.88	26.65	160.45
1959	29.4	72.78	430.74	170.70	1010.27	56.70	335.57	27.30	161.57
1960	29.8	74.04	432.31	188.00	1,097.72	58.90	343.91	28.35	165.53
1961	30.0	75.65	438.77	189.30	1,097.94	57.60	334.08	29.45	170.81
1962	30.4	76.19	436.09	190.70	1,091.51	61.55	352.29	29.30	167.70
1963	30.9	76.88	432.92	192.50	1,083.98	62.80	353.63	29.70	167.24
1964	31.2	77.57	432.60	193.40	1,078.58	63.65	354.97	31.50	175.67
1965	31.8	83.92	459.18	219.80	1,202.68	63.10	345.26	32.85	179.75
1966	32.9	84.35	446.11	221.90	1,173.57	68.05	359.90	36.25	191.72
1967	33.9	85.37	438.18	224.40	1,151.79	70.15	360.06	39.50	202.74
1968	35.5	98.86	484.55	257.10	1,260.15	69.55	340.89	44.75	219.34
1969	37.7	100.40	463.38	255.80	1,180.62	73.90	341.08	45.15	208.38
1970	39.8	118.10	516.32	291.10	1,272.65	77.65	339.47	50.30	219.90
1971	41.1	132.17	559.55	320.00	1,354.74	77.50	328.10	52.30	221.42
1972	42.5	162.35	664.68	383.10	1,568.46	79.95	327.32	54.10	221.49
1973	46.2	166.42	626.78	391.00	1,472.60	76.15	286.80	56.95	214.49
1974	51.9	188.21	630.99	438.40	1,469.78	91.06	305.29	63.37	212.45
1975	55.5	207.18	649.54	468.60	1,469.12	90.93	285.08	69.69	218.49
1976	58.2	224.86	672.26	503.40	1,505.01	94.37	282.14	75.20	224.82
1977	62.1	243.00	680.87	546.60	1,531.54	96.62	270.72	80.08	224.38
1978	67.7	263.20	676.47	591.90	1,521.28	100.43	258.12	83.60	214.87
1979	76.7	294.30	667.64	655.00	1,485.92	122.67	278.29	90.34	204.94
1980	86.3	341.40	688.34	759.20	1,530.72	128.20	258.48	97.10	195.78
1981	94.0	385.97	714.46	858.00	1,588.21	137.81	255.10	103.15	190.94
1982	97.6	419.30	747.52	885.50	1,578.66	145.69	259.73	106.33	189.56
1983	101.3	440.77	757.10	923.00	1,585.41	157.89	271.20	109.93	188.82
1984	105.3	460.57	761.06	948.30	1,566.99	157.88	260.88	114.72	189.57
1985	109.3	478.62	761.94	981.50	1,562.50	164.26	261.49	118.17	188.12
1986	110.5	488.44	769.13	994.00	1,565.21	173.66	273.46	122.09	192.25
1987	115.4	512.65	772.97	1,032.30	1,556.50	180.64	272.37	125.19	188.76
1988	120.5	536.77	775.09	1,070.40	1,545.64	188.23	271.80	130.30	188.15
1989	126.1	566.85	782.17	1,120.04	1,545.50	198.81	274.33	131.89	181.99
1990	133.8	602.56	783.60	1,177.70	1,531.54	212.66	276.55	135.96	176.81
1991	137.9	629.32	794.07	1,216.76	1,535.29	221.30	279.23	134.98	170.32
1992	141.9	652.64	800.28	1,252.40	1,535.71	227.39	278.83	132.92	162.99
1993	145.8	674.06	804.43	1,282.60	1,530.67	236.52	282.27	132.87	158.57
1994	149.7	697.34	810.54	1,328.40	1,544.03	242.54	281.91	133.71	155.41
1995	153.5	719.80	815.93	1,365.50	1,547.86	250.65	284.12	134.35	152.29
1996	158.6	744.96	817.30	1,450.60	1,591.45	260.75	286.07	133.53	146.50
1997	161.3	774.84	835.85	1,502.60	1,620.91	268.46	289.60	170.71	184.15
1998	163.9	779.69	827.74	1,537.70	1,632.46	277.45	294.55	197.80	209.99
1999	168.3	804.30	831.54	1,590.40	1,644.26	289.19	298.98	236.16	244.16
2000	174.0	844.48	844.48	1,675.40	1,675.40	299.69	299.69	<sup>4</sup> 147.78	147.78

<sup>1</sup> Data from Bureau of Labor Statistics, consumer price index for all urban consumers (CPI-U).<sup>2</sup> Beginning in 1974, represents payments to the aged under the SSI program.<sup>3</sup> Effective July 1, 1997, the Temporary Assistance for Needy Families (TANF) block grant program replaced the Aid to Families with Dependent Children (AFDC) program. Beginning in 1997, payments include services.<sup>4</sup> Preliminary data.

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

### 3.C Interprogram Data

Table 3.C5.—Population aged 65 or older receiving Social Security (OASDI) benefits, Supplemental Security Income (SSI) payments, or both 1940–2000, ranked by state, December 2000 <sup>1</sup>

Year and state	Population aged 65 or older receiving—						Persons receiving both OASDI and SSI as a percent of—	
	OASDI		SSI <sup>2</sup>		OASDI and SSI, number per 1,000	OASDI or SSI or both, number per 1,000	OASDI beneficiaries	SSI recipients
	Number per 1,000	State rank	Number per 1,000	State rank				
1940.....	7	...	217	...	1	223	14.3	0.5
1945.....	62	...	194	...	5	251	8.1	2.6
1950.....	164	...	224	...	22	366	12.6	9.8
1955.....	394	...	179	...	34	539	8.6	19.2
1960.....	616	...	141	...	41	716	6.6	28.5
1965.....	752	...	117	...	52	817	7.0	44.7
1970.....	855	...	104	...	63	896	7.4	60.4
1975.....	904	...	111	...	78	939	8.6	69.5
1980.....	914	...	87	...	61	941	6.7	70.2
1985.....	917	...	71	...	51	937	5.5	71.1
1990.....	924	...	66	...	46	944	4.9	69.2
1995.....	913	...	63	...	39	937	4.3	62.6
1996.....	907	...	61	...	38	931	4.2	61.7
1997.....	913	...	60	...	37	955	4.0	61.4
1998.....	906	...	59	...	36	929	3.9	60.5
1999.....	908	...	58	...	35	927	3.8	59.7
2000.....	911	...	57	...	34	934	3.7	59.1
Alabama.....	922	30	77	6	62	937	6.7	80.3
Alaska.....	917	35	58	15	26	949	2.8	44.8
Arizona.....	845	50	32	32	19	858	2.3	60.2
Arkansas.....	916	37	65	11	54	926	5.9	83.3
California.....	865	48	132	1	64	933	7.4	48.6
Colorado.....	917	34	33	29	20	931	2.2	59.8
Connecticut.....	951	7	26	37	12	964	1.3	47.4
Delaware.....	947	11	24	42	16	954	1.7	67.0
District of Columbia.....	792	51	72	9	44	820	5.6	61.5
Florida.....	851	49	47	21	24	874	2.9	52.1
Georgia.....	915	38	75	7	55	934	6.0	74.1
Hawaii.....	888	46	55	17	22	921	2.5	40.3
Idaho.....	954	6	21	44	16	958	1.7	77.2
Illinois.....	915	39	38	25	17	936	1.8	43.4
Indiana.....	948	9	18	47	13	953	1.3	70.7
Iowa.....	949	8	18	49	13	953	1.3	72.3
Kansas.....	931	24	19	45	13	938	1.3	65.3
Kentucky.....	919	32	74	8	55	938	6.0	75.1
Louisiana.....	896	43	84	4	62	917	6.9	74.0
Maine.....	947	10	33	30	27	953	2.9	82.8
Maryland.....	887	47	41	24	20	908	2.3	49.6
Massachusetts.....	923	29	58	16	34	946	3.7	58.8
Michigan.....	962	2	31	34	19	974	1.9	60.8
Minnesota.....	938	14	26	38	14	950	1.5	53.6
Mississippi.....	912	40	114	2	92	934	10.1	80.6
Missouri.....	933	23	31	33	23	941	2.4	73.1
Montana.....	926	26	21	43	16	931	1.7	76.5
Nebraska.....	938	15	18	48	13	943	1.4	70.9
Nevada.....	921	31	33	31	19	934	2.1	59.6
New Hampshire.....	980	1	13	51	9	984	0.9	69.4
New Jersey.....	926	25	45	22	21	950	2.3	46.6
New Mexico.....	888	45	70	10	49	909	5.5	69.2
New York.....	894	44	89	3	42	941	4.7	47.0
North Carolina.....	942	13	60	14	47	955	5.0	79.0
North Dakota.....	937	16	24	40	18	943	1.9	74.7
Ohio.....	937	18	24	39	15	946	1.6	61.2
Oklahoma.....	925	27	41	23	31	936	3.3	73.9
Oregon.....	960	4	26	36	15	971	1.6	58.5
Pennsylvania.....	933	22	34	28	21	945	2.3	63.2
Rhode Island.....	937	17	50	18	32	955	3.4	64.1
South Carolina.....	923	28	63	12	49	936	5.3	78.7
South Dakota.....	946	12	31	35	22	955	2.3	70.4
Tennessee.....	935	21	61	13	47	949	5.0	76.8
Texas.....	899	42	78	5	54	923	6.0	69.1
Utah.....	917	36	19	46	10	926	1.0	50.8
Vermont.....	936	19	38	26	32	943	3.4	83.4
Virginia.....	907	41	49	19	32	925	3.5	64.4
Washington.....	936	20	36	27	15	956	1.6	42.1
West Virginia.....	919	33	47	20	33	933	3.6	70.2
Wisconsin.....	961	3	24	41	16	969	1.7	66.8
Wyoming.....	954	5	16	50	13	957	1.3	78.5

<sup>1</sup> Population data for 2000 on which ratios are based furnished by the U.S. Census Bureau.

<sup>2</sup> For 1940–1973, data refer to Old-Age Assistance program. Beginning January 1974, the Supplemental Security Income program superseded the Old-Age Assistance program in the 50 states and the District of Columbia.

CONTACT: Stella M. Coleman/Rona Blumenthal (410) 965-0157/0163 for further information.

Table 3.C6.—Number and percent of OASDI beneficiaries also receiving federally administered SSI payments, by SSI category and type of OASDI benefit, December 2000

[Based on 10-percent sample]

Type of benefit	All OASDI beneficiaries <sup>1</sup>	OASDI beneficiaries with SSI					
		Number			Percent of all OASDI beneficiaries		
		Total	Aged	Blind and disabled	Total	Aged	Blind and disabled
Total .....	45,417,400	2,386,850	751,740	1,635,110	5.3	1.7	3.6
Retirement .....	31,761,120	1,063,080	588,540	474,540	3.3	1.9	1.5
Workers aged 65 or older .....	25,952,920	793,180	526,810	266,370	3.1	2.0	1.0
Men .....	13,441,700	299,600	191,920	107,680	2.2	1.4	.8
Women .....	12,511,220	493,580	334,890	158,690	3.9	2.7	1.3
Workers aged 62–64 .....	2,553,070	37,550	...	37,550	1.5	...	1.5
Men .....	1,330,230	23,110	...	23,110	1.7	...	1.7
Women .....	1,222,840	14,440	...	14,440	1.2	...	1.2
Wives and husbands .....	2,797,170	128,950	61,700	67,250	4.6	2.2	2.4
Aged 65 or older .....	2,432,150	115,900	61,700	54,200	4.8	2.5	2.2
Aged 62–64 .....	316,600	11,710	...	11,710	3.7	...	3.7
Under age 62 with children .....	48,420	1,340	...	1,340	2.8	...	2.8
Disabled adult children .....	191,950	99,470	30	99,440	51.8	...	51.8
Aged 65 or older .....	990	400	30	370	40.4	3.0	37.4
Aged 18–64 .....	190,960	99,070	...	99,070	51.9	...	51.9
Children under age 18 and students aged 18–19 .....	266,010	3,930	...	3,930	1.5	...	1.5
Disability .....	6,675,280	833,150	1,140	832,010	12.5	...	12.5
Workers under age 65 .....	5,035,840	742,080	...	742,080	14.7	...	14.7
Men .....	2,856,870	333,950	...	333,950	11.7	...	11.7
Women .....	2,178,970	408,130	...	408,130	18.7	...	18.7
Wives and husbands .....	164,850	11,230	1,140	10,090	6.8	.7	6.1
Aged 65 or older .....	22,420	3,330	1,140	2,190	14.9	5.1	9.8
Aged 62–64 .....	29,820	1,640	...	1,640	5.5	...	5.5
Under age 62 with children .....	112,610	6,260	...	6,260	5.6	...	5.6
Disabled adult children aged 18–64 .....	58,090	39,910	...	39,910	68.7	...	68.7
Children under age 18 and students aged 18–19 .....	1,416,500	39,930	...	39,930	2.8	...	2.8
Survivors .....	6,981,000	490,620	162,060	328,560	7.0	2.3	4.7
Nondisabled widows and widowers .....	4,698,660	268,430	158,900	109,530	5.7	3.4	2.3
Aged 65 or older .....	4,236,540	259,690	158,900	100,790	6.1	3.8	2.4
Aged 60–64 .....	462,120	8,740	...	8,740	1.9	...	1.9
Disabled widows and widowers .....	200,130	38,850	...	38,850	19.4	...	19.4
Widowed mothers and fathers .....	201,270	5,570	20	5,550	2.8	...	2.8
Parents .....	3,000	240	220	20	8.0	7.3	.7
Disabled adult children .....	483,570	157,430	2,920	154,510	32.6	.6	32.0
Aged 65 or older .....	62,740	21,450	2,920	18,530	34.2	4.7	29.5
Aged 18–64 .....	420,830	135,980	...	135,980	32.3	...	32.3
Children under age 18 and students aged 18–19 .....	1,394,370	20,100	...	20,100	1.4	...	1.4

<sup>1</sup> Excludes 70 special age-72 beneficiaries.

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

### 3.C Interprogram Data

Table 3.C6.1.—Number of persons aged 18–64 receiving Social Security (OASDI) benefits or federally administered SSI payments based on disability, by type of benefit, 1978–2000

December	Unduplicated total <sup>1</sup>	OASDI beneficiaries				Blind or disabled SSI recipients		
		Total	Disabled workers	Disabled adult children, under age 65	Disabled widows and widowers	Total	Persons with—	
							SSI only	Both SSI and OASDI
1978.....	4,676,450	3,415,469	2,879,774	405,944	129,751	1,747,126	<sup>2</sup> 1,260,981	486,145
1979.....	4,662,528	3,419,624	2,870,590	419,201	129,833	1,726,553	<sup>2</sup> 1,242,904	483,649
1980.....	4,662,546	3,418,434	2,858,680	432,174	127,580	1,730,847	<sup>2</sup> 1,244,112	486,735
1981.....	4,570,071	3,340,701	2,776,519	442,592	121,590	1,702,895	<sup>2</sup> 1,229,370	473,525
1982.....	4,366,314	3,169,449	2,603,599	449,478	116,372	1,655,279	<sup>2</sup> 1,196,865	458,414
1983.....	4,367,241	3,143,111	2,569,029	462,491	111,591	1,699,774	<sup>2</sup> 1,224,130	475,644
1984.....	4,460,188	3,183,618	2,596,516	477,951	109,151	1,780,459	<sup>2</sup> 1,276,570	503,889
1985.....	4,591,316	3,258,200	2,656,638	494,557	107,005	1,879,168	<sup>2</sup> 1,333,116	546,052
1986.....	4,812,143	3,346,603	2,728,463	511,166	106,974	2,010,458	<sup>2</sup> 1,465,540	544,918
1987.....	4,904,785	3,416,529	2,785,859	524,388	106,282	2,118,710	<sup>2</sup> 1,488,256	630,454
1988.....	5,012,435	3,468,186	2,830,284	534,779	103,123	2,202,714	1,544,249	658,465
1989.....	5,155,787	3,540,480	2,895,364	543,486	101,630	2,301,926	<sup>3</sup> 1,615,307	686,619
1990.....	5,395,261	3,667,721	3,011,294	555,438	100,989	2,449,897	1,727,540	722,357
1991.....	5,743,614	3,877,804	3,194,938	568,377	114,489	2,641,524	1,865,810	775,714
1992.....	6,249,217	4,185,714	3,467,783	586,607	131,324	2,909,997	2,063,503	846,494
1993.....	6,707,127	4,476,648	3,725,966	603,667	147,015	3,148,413	2,230,479	917,934
1994.....	7,103,399	4,741,348	3,962,954	617,718	160,676	3,335,255	2,362,051	973,204
1995.....	7,398,942	4,987,004	4,185,263	628,717	173,024	3,482,256	2,411,938	1,070,318
1996.....	7,691,134	5,205,071	4,385,623	637,537	181,911	3,568,393	2,486,063	1,082,330
1997.....	7,818,216	5,340,082	4,508,134	644,010	187,938	3,561,625	2,478,134	1,083,491
1998.....	8,090,686	5,543,886	4,698,319	651,386	194,181	3,646,020	2,546,800	1,099,220
1999.....	8,311,949	5,736,071	4,879,455	657,821	198,795	3,690,970	2,575,878	1,115,092
2000.....	8,519,241	5,908,756	5,042,334	664,995	201,427	3,744,022	2,610,485	1,133,537

<sup>1</sup> Includes persons receiving OASDI, SSI, or both.

<sup>2</sup> The number of OASDI disabled adult child beneficiaries aged 18–64 also receiving SSI was estimated based on the number of such beneficiaries aged 18 or older for the same year and on the comparative size of the two groups at the end of 1988.

<sup>3</sup> December data for OASDI disabled beneficiaries also receiving SSI not available. Instead the average of the September 1989 and March 1990 numbers was used.



Table 3.C7.—Number of persons aged 15 or older with Social Security benefits or Supplemental Security Income, by age, sex, race, March 2000, and median annual benefit, 1999

[Civilian noninstitutionalized population residing in the 50 states and the District of Columbia]

Age, sex and median benefit	Total	White	Black	American Indian, Eskimo, Aleut	Asian, Pacific Islander
With Social Security					
Total number (in thousands).....	37,783	33,186	3,690	254	653
Men.....	16,233	14,305	1,529	106	293
Women.....	21,550	18,881	2,161	148	360
Under 55.....	3,998	3,074	792	58	74
55-64.....	4,601	3,956	541	38	66
65-74.....	15,447	13,637	1,366	111	332
75 or older.....	13,738	12,519	991	47	181
<b>Median benefit.....</b>	<b>\$8,574</b>	<b>\$8,844</b>	<b>\$7,032</b>	<b>\$7,200</b>	<b>\$7,746</b>
With Supplemental Security Income					
Total number (in thousands).....	4,895	3,249	1,336	61	249
Men.....	1,939	1,335	491	16	97
Women.....	2,956	1,915	845	45	152
Under 55.....	2,779	1,825	853	41	61
55-64.....	824	588	197	1	38
65-74.....	686	462	142	13	69
75 or older.....	606	375	144	5	82
<b>Median benefit.....</b>	<b>\$5,232</b>	<b>\$4,890</b>	<b>\$5,472</b>	<b>\$5,520</b>	<b>\$6,000</b>

Source: Public use file of the March 2000 Income Supplement, Current Population Survey, U.S. Census Bureau. For a discussion of standard errors of estimated numbers and percentages, see U.S. Census Bureau, *Current Population Reports*, P-60 series.

### 3.C Interprogram Data

Table 3.C8.—Number of persons aged 15 or older with Social Security benefits or Supplemental Security Income and number and percent of Hispanic origin, by age, sex, March 2000, and median annual benefit, 1999

[Civilian noninstitutionalized population residing in the 50 states and the District of Columbia]

Age and median benefit	Number (in thousands)						Percent of Hispanic origin		
	Total			Hispanic origin <sup>1</sup>			Total	Men	Women
	Total	Men	Women	Total	Men	Women			
With Social Security									
Total.....	37,783	16,233	21,550	2,094	910	1,184	5.5	5.6	5.5
Under 35.....	1,304	613	690	151	76	75	11.6	12.3	10.9
35-44.....	1,201	584	617	121	52	69	10.0	8.9	11.1
45-54.....	1,493	772	722	126	68	59	8.5	8.8	8.1
55-64.....	4,601	2,064	2,537	311	136	175	6.8	6.6	6.9
65-74.....	15,447	6,876	8,570	856	364	491	5.5	5.3	5.7
75 or older.....	13,738	5,324	8,414	529	214	315	3.9	4.0	3.7
<b>Median benefit.....</b>	<b>\$8,574</b>	<b>\$10,314</b>	<b>\$7,158</b>	<b>\$6,786</b>	<b>\$8,226</b>	<b>\$6,006</b>	...	...	...
With Supplemental Security Income									
Total.....	4,895	1,939	2,956	666	242	424	13.6	12.5	14.3
Under 35.....	1,087	460	628	118	64	54	10.8	13.9	8.6
35-44.....	837	427	410	95	40	54	11.3	9.5	13.2
45-54.....	855	357	498	98	32	66	11.4	8.9	13.3
55-64.....	824	309	515	111	41	70	13.5	13.4	13.5
65-74.....	686	225	461	136	31	105	19.8	13.6	22.8
75 or older.....	606	161	445	109	34	75	18.0	21.2	16.8
<b>Median benefit.....</b>	<b>\$5,232</b>	<b>\$5,280</b>	<b>\$5,160</b>	<b>\$5,400</b>	<b>\$5,184</b>	<b>\$5,400</b>	...	...	...

<sup>1</sup> Persons of Hispanic origin may be of any race.

Source: Public use file of March 2000 Income Supplement, Current Population Survey, U.S. Census Bureau. For a discussion of standard errors of estimated numbers and percentages, see U.S. Census Bureau, *Current Population Reports*, P-60 series.

Table 3.E1.—Weighted average poverty thresholds for nonfarm families of specified size, 1959–2000

Calendar year	Unrelated individuals			Families of 2 persons or more								Annual average CPI, all items (1982–84 = 100) <sup>1</sup>
	All ages	Under age 65	Aged 65 or older	2 persons			3 persons	4 persons	5 persons	6 persons	7 persons or more	
				All ages	Householder under age 65	Householder aged 65 or older						
1959.....	\$1,467	\$1,503	\$1,397	\$1,894	\$1,952	\$1,761	\$2,324	\$2,973	\$3,506	\$3,944	\$4,849	29.2
1960.....	1,490	1,526	1,418	1,924	1,982	1,788	2,359	3,022	3,560	4,002	4,921	29.6
1961.....	1,506	1,545	1,433	1,942	2,005	1,808	2,383	3,054	3,597	4,041	4,967	29.9
1962.....	1,519	1,562	1,451	1,962	2,027	1,828	2,412	3,089	3,639	4,088	5,032	30.3
1963.....	1,539	1,581	1,470	1,988	2,052	1,850	2,442	3,128	3,685	4,135	5,092	30.6
1964.....	1,558	1,601	1,488	2,015	2,079	1,875	2,473	3,169	3,732	4,193	5,156	31.0
1965.....	1,582	1,626	1,512	2,048	2,114	1,906	2,514	3,223	3,797	4,264	5,248	31.5
1966.....	1,628	1,674	1,556	2,107	2,175	1,961	2,588	3,317	3,908	4,388	5,395	32.5
1967.....	1,675	1,722	1,600	2,168	2,238	2,017	2,661	3,410	4,019	4,516	5,550	33.4
1968.....	1,748	1,797	1,667	2,262	2,333	2,102	2,774	3,553	4,188	4,706	5,789	34.8
1969.....	1,840	1,893	1,757	2,383	2,458	2,215	2,924	3,743	4,415	4,958	6,101	36.7
1970.....	1,954	2,010	1,861	2,525	2,604	2,348	3,099	3,968	4,680	5,260	6,468	38.8
1971.....	2,040	2,098	1,940	2,633	2,716	2,448	3,229	4,137	4,880	5,489	6,751	40.5
1972.....	2,109	2,168	2,005	2,724	2,808	2,530	3,339	4,275	5,044	5,673	6,983	41.8
1973.....	2,247	2,307	2,130	2,895	2,984	2,688	3,548	4,540	5,358	6,028	7,435	44.4
1974.....	2,495	2,562	2,364	3,211	3,312	2,982	3,936	5,038	5,950	6,699	8,253	49.3
1975.....	2,724	2,797	2,581	3,506	3,617	3,257	4,293	5,500	6,499	7,316	9,022	53.8
1976.....	2,884	2,959	2,730	3,711	3,826	3,445	4,540	5,815	6,876	7,760	9,588	56.9
1977.....	3,075	3,152	2,906	3,951	4,072	3,666	4,833	6,191	7,320	8,261	10,216	60.6
1978.....	3,311	3,392	3,127	4,249	4,383	3,944	5,201	6,662	7,880	8,891	11,002	65.2
1979.....	3,689	3,778	3,479	4,725	4,878	4,390	5,784	7,412	8,775	9,914	12,280	72.6
1980.....	4,190	4,290	3,949	5,363	5,537	4,983	6,565	8,414	9,966	11,269	13,955	82.4
1981.....	4,620	4,729	4,359	5,917	6,111	5,498	7,250	9,287	11,007	12,449	...	90.9
1982.....	4,901	5,019	4,626	6,281	6,487	5,836	7,693	9,862	11,684	13,207	...	96.5
1983.....	5,061	5,180	4,775	6,483	6,697	6,023	7,938	10,178	12,049	13,630	...	99.6
1984.....	5,278	5,400	4,979	6,762	6,983	6,282	8,277	10,609	12,566	14,207	...	103.9
1985.....	5,469	5,593	5,156	6,998	7,231	6,503	8,573	10,989	13,007	14,696	...	107.6
1986.....	5,572	5,701	5,255	7,138	7,372	6,630	8,737	11,203	13,259	14,986	...	109.6
1987.....	5,778	5,909	5,447	7,397	7,641	6,872	9,056	11,611	13,737	15,509	...	113.6
1988.....	6,022	6,155	5,674	7,704	7,958	7,157	9,435	12,092	14,304	16,146	...	118.3
1989.....	6,310	6,451	5,947	8,076	8,343	7,501	9,885	12,674	14,990	16,921	...	124.0
1990.....	6,652	6,800	6,268	8,509	8,794	7,905	10,419	13,359	15,792	17,839	...	130.7
1991.....	6,932	7,086	6,532	8,865	9,165	8,241	10,860	13,924	16,456	18,587	...	136.2
1992.....	7,143	7,299	6,729	9,137	9,443	8,487	11,186	14,335	16,952	19,137	...	140.3
1993.....	7,363	7,518	6,930	9,414	9,728	8,740	11,522	14,763	17,449	19,718	...	144.5
1994.....	7,547	7,710	7,108	9,661	9,976	8,967	11,821	15,141	17,900	20,235	...	148.2
1995.....	7,763	7,929	7,309	9,933	10,259	9,219	12,158	15,569	18,408	20,804	...	152.4
1996.....	7,995	8,163	7,525	10,233	10,564	9,491	12,516	16,036	18,952	21,389	...	156.9
1997.....	8,183	8,350	7,698	10,473	10,805	9,712	12,802	16,400	19,380	21,886	...	160.5
1998.....	8,316	8,480	7,818	10,634	10,972	9,862	13,003	16,660	19,680	22,228	...	163.0
1999.....	8,501	8,667	7,990	10,869	11,214	10,075	13,290	17,029	20,127	22,727	...	166.6
2000 <sup>2</sup> .....	8,787	8,958	8,259	11,234	11,591	10,414	13,737	17,601	20,804	23,491	...	172.2

<sup>1</sup> Beginning in January 1978, the Bureau of Labor Statistics introduced a new price index for all urban consumers (CPI-U) that forms a continuous series with the earlier index for urban wage earners and for clerical workers as of December 1977.

<sup>2</sup> Preliminary data; 1999 weighted average poverty levels raised to correspond with the 2000 increase from the 1999 Consumer Price Index (CPI-U) for all Urban Consumers.

Note: Three technical changes in the definition of poverty are described in "Characteristics of the Population Below the Poverty Level, 1980," U.S. Census Bureau, *Current Population Reports*, Series P-60, No. 133: (1) Distinctions based on the sex of the family householder will no longer be made; (2) income thresholds for farm families will be the same as for nonfarm families of the same size and composition, and (3) the increased sample size will now permit separate poverty income criteria for families of 7, 8, and 9 or more persons. Separate criteria for these family sizes by number of children have been developed by the Social Security Administration for the base year 1978 on the same basis as the original poverty matrix for smaller family sizes, and then updated by means of the all-items Consumer Price Index. The thresholds for larger families beginning in 1980 are:

Year	7 persons	8 persons	9 persons or more
1980.....	\$12,761	\$14,199	\$16,896
1981.....	14,110	15,655	18,572
1982.....	15,036	16,719	19,698
1983.....	15,500	17,170	20,310
1984.....	16,096	17,961	21,247
1985.....	16,656	18,512	22,083
1986.....	17,049	18,791	22,497
1987.....	17,649	19,515	23,105
1988.....	18,232	20,253	24,129
1989.....	19,162	21,328	25,480
1990.....	20,241	22,582	26,848
1991.....	21,058	23,605	27,942
1992.....	21,594	24,053	28,745
1993.....	22,383	24,838	29,529
1994.....	22,923	25,427	30,300
1995.....	23,552	26,237	31,280
1996.....	24,268	27,091	31,971
1997.....	24,802	27,593	32,566
1998.....	25,257	28,166	33,339
1999.....	25,912	28,967	34,417
2000 (see footnote 2 above).....	26,783	29,941	35,574

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### 3.E Poverty

Table 3.E2.—Number and percent of poor persons, by age, at end of 1959–1999 <sup>1</sup>

[Civilian noninstitutionalized population residing in the 50 states and the District of Columbia]

Age and family status <sup>2</sup>	1959	1970	1975	1980	1985	1990 <sup>3</sup>	1998	1999
Total population <sup>4</sup> (in millions)								
All ages .....	176.5	202.5	210.4	225.0	236.6	248.6	271.1	273.5
Children under 18 in families .....	64.0	69.9	64.8	62.2	62.0	64.9	70.2	70.5
With—								
Male householder <sup>5</sup> .....	58.3	60.8	54.1	50.6	49.5	49.5	52.9	54.0
Female householder .....	5.7	9.0	10.6	11.5	12.5	15.4	17.2	16.4
18–54 <sup>6</sup> .....	81.0	94.9	104.7	116.3	125.2	132.3	144.6	146.0
55–64 .....	15.5	18.4	19.8	21.7	22.1	21.3	22.9	23.4
65 or older .....	15.6	19.3	21.7	24.7	27.3	30.1	32.4	32.6
In families .....	11.9	13.4	14.8	16.7	18.4	20.1	21.8	22.0
Unrelated individuals .....	3.7	5.8	6.9	8.0	8.9	10.0	10.6	10.6
Men .....	1.2	1.4	1.5	1.7	2.0	2.3	2.7	2.8
Women .....	2.5	4.4	5.4	6.3	7.0	7.7	7.9	7.8
Number poor (in millions) <sup>4</sup>								
All ages .....	39.5	25.3	25.9	29.3	33.1	33.6	34.5	32.3
Children under 18 in families .....	17.2	10.5	10.9	11.1	12.5	13.3	12.8	11.5
With—								
Male householder <sup>5</sup> .....	13.1	5.7	5.3	5.2	5.8	5.3	5.1	4.8
Female householder .....	4.1	4.8	5.6	5.9	6.7	8.0	7.7	6.7
18–54 <sup>6</sup> .....	13.4	8.2	9.7	12.2	14.8	14.6	15.6	15.0
55–64 .....	3.3	2.1	2.0	2.1	2.3	2.1	2.2	2.2
65 or older .....	5.5	4.7	3.3	3.9	3.5	3.7	3.4	3.2
In families .....	3.2	2.0	1.2	1.4	1.2	1.2	1.2	1.1
Unrelated individuals .....	2.3	2.7	2.1	2.4	2.3	2.5	2.2	2.1
Men .....	.7	.5	.4	.4	.4	.4	.4	.5
Women .....	1.6	2.2	1.7	2.0	1.9	2.1	1.7	1.6
Percent poor <sup>4</sup>								
All ages .....	22.4	12.6	12.3	13.0	14.0	13.5	12.7	11.8
Children under 18 in families .....	26.9	15.0	16.8	17.9	20.1	20.5	18.3	16.3
With—								
Male householder <sup>5</sup> .....	22.4	9.3	9.8	10.4	11.7	10.7	9.6	9.0
Female householder .....	72.2	53.4	52.7	50.8	53.6	52.1	44.8	40.6
18–54 <sup>6</sup> .....	16.5	8.7	9.2	10.5	11.8	11.0	10.8	10.3
55–64 .....	21.5	11.4	10.2	9.5	10.5	9.7	9.6	9.5
65 or older .....	35.2	24.6	15.3	15.7	12.6	12.2	10.5	9.7
In families .....	26.9	14.7	8.0	8.5	6.4	5.9	5.7	4.9
Unrelated individuals .....	61.9	47.1	31.0	30.6	25.6	24.8	20.4	19.7
Men .....	59.0	38.9	27.7	24.4	20.5	17.3	16.3	16.4
Women .....	63.3	49.7	31.9	32.3	27.0	26.9	21.7	20.9

<sup>1</sup> Data for 1970 and 1975 are based on the 1970 Census of Population controls.

<sup>2</sup> Income and poverty status refer to the calendar year shown; family status is as of March of the succeeding year.

<sup>3</sup> Based on revised methodology.

<sup>4</sup> Includes Armed Forces in the United States living off post or with families on post. Excludes unrelated individuals under age 16.

<sup>5</sup> Includes children in families with both spouses present and in families with male householder with no spouse present.

<sup>6</sup> Includes persons under age 18 listed as unrelated individual, family householder, spouse of householder, or other family member.

Source: Public use file of the March 2000 Income Supplement, Current Population Survey, U.S. Census Bureau. For a discussion of standard errors of estimated numbers and percentages, see U.S. Census Bureau, *Current Population Reports*, P-60 series.

Table 3.E3.—Shares of money income from earnings and other sources for aged and nonaged families, 1999

[Civilian noninstitutionalized population residing in the 50 states and the District of Columbia]

Type of money income received during year <sup>1</sup>	Aged family units						Nonaged family units					
	Individuals aged 65 or older living alone or with nonrelatives only			Multiperson families with householder aged 65 or older			Individuals under age 65 living alone or with nonrelatives only			Multiperson families with householder under age 65		
	Total	Nonpoor	Poor <sup>2</sup>	Total	Nonpoor	Poor <sup>2</sup>	Total	Nonpoor	Poor <sup>2</sup>	Total	Nonpoor	Poor <sup>2</sup>
Number of families and unrelated individuals (in millions).....	10.6	8.5	2.1	11.6	11.0	0.6	32.9	26.4	6.5	60.4	54.4	6.1
	Percent receiving income of specified type <sup>3</sup>											
Earnings.....	14	16	3	45	47	24	84	94	44	95	97	70
Public program payments:												
Social Security <sup>4</sup> .....	92	94	84	92	93	65	6	5	11	10	10	10
Supplemental Security Income.....	6	2	21	5	5	13	4	1	12	3	2	11
Other public assistance.....	2	2	2	4	4	6	10	9	13	12	11	29
Other programs <sup>5</sup> .....	4	5	3	8	8	4	6	6	3	9	10	7
Other sources:												
Dividends, interest, rent.....	60	68	26	71	73	28	48	56	17	63	68	15
Employment-related pensions, alimony, annuities, etc.....	41	49	8	52	54	14	6	6	3	16	16	14
	Percentage distribution of income, by type											
Total percent.....	100	100	100	100	100	100	100	100	100	100	100	100
Earnings.....	13	14	(6)	33	33	13	87	88	50	89	89	66
Public program payments:												
Social Security <sup>4</sup> .....	44	41	83	30	30	64	2	1	18	2	1	8
Supplemental Security Income.....	1	(6)	10	1	1	9	1	(6)	15	(6)	(6)	7
Other public assistance.....	(6)	(6)	(6)	(6)	(6)	2	2	2	9	1	1	11
Other programs <sup>5</sup> .....	1	1	1	1	1	1	1	1	2	1	1	3
Other sources:												
Dividends, interest, rent.....	20	21	2	17	18	4	6	6	3	5	5	1
Employment-related pensions, alimony, annuities, etc.....	20	21	3	17	17	7	2	2	3	3	3	4
<b>Median income</b> .....	<b>\$13,809</b>	<b>\$16,435</b>	<b>\$5,572</b>	<b>\$33,131</b>	<b>\$34,719</b>	<b>\$7,741</b>	<b>\$23,365</b>	<b>\$28,739</b>	<b>\$3,779</b>	<b>\$52,593</b>	<b>\$56,149</b>	<b>\$8,356</b>

<sup>1</sup> Household surveys tend to underestimate the number of income recipients with income sources such as interest, dividends, rents, veterans' payments, unemployment compensation, and workers' compensation are more underreported than others. For more detail, see U.S. Census Bureau, *The Value of Noncash Benefits: 1979-1982*, Technical Paper No. 52, Appendix F.

<sup>2</sup> Poverty status based on money income of all family members after receipt of OASDI and any other cash transfer payments.

<sup>3</sup> Received by individuals or any family member at any time during 1998. Most individuals or families received more than one type of income during the year.

<sup>4</sup> Social Security may include more than one type of income during the year.

<sup>5</sup> Unemployment insurance, workers' compensation, or veterans' payments.

<sup>6</sup> Less than 0.05 percent.

Source: Public use file of the March 2000 Income Supplement, Current Population Survey, U.S. Census Bureau. For a discussion of standard errors of estimated numbers and percentages, see U.S. Census Bureau, *Current Population Reports*, P-60 series.

### 3.E Poverty

Table 3.E4.—Current living arrangements of persons aged 65 or older, March 2000 <sup>1</sup>

[Civilian noninstitutionalized population residing in the 50 states and the District of Columbia]

Living arrangement and sex	Population (in thousands)			Percentage distribution			Percent officially poor
	Total	Poor	Nonpoor	Total	Poor	Nonpoor	
Total.....	32,621	3,167	29,454	100	100	100	9.7
Unrelated individuals.....	10,641	2,095	8,546	32.6	66.1	29.0	19.7
Family members.....	21,980	1,072	20,908	67.4	33.9	71.0	4.9
Householder or spouse.....	19,978	961	19,017	61.2	30.3	64.6	4.8
Other relative <sup>2</sup> .....	2,002	112	1,890	6.1	3.5	6.4	5.6
Poor by own income.....	863	101	762	2.6	3.2	2.6	11.7
Not poor by own income.....	1,139	11	1,129	3.5	.3	3.8	.9
Men.....	13,886	960	12,926	42.6	30.3	43.9	6.9
Unrelated individuals.....	2,816	461	2,355	8.6	14.6	8.0	16.4
Family members.....	11,070	499	10,571	33.9	15.8	35.9	4.5
Householder.....	8,172	360	7,813	25.1	11.4	26.5	4.4
Spouse of householder.....	2,328	118	2,211	7.1	3.7	7.5	5.0
Other relative <sup>2</sup> .....	570	22	548	1.7	.7	1.9	3.9
Poor by own income.....	179	22	156	.5	.7	.5	12.4
Not poor by own income.....	392	(3)	392	1.2	(3)	1.3	(3)
Women.....	18,735	2,207	16,528	57.4	69.7	56.1	11.8
Unrelated individuals.....	7,826	1,634	6,192	24.0	51.6	21.0	20.9
Family members.....	10,910	573	10,337	33.4	18.1	35.1	5.3
Householder, no husband present.....	1,735	184	1,551	5.3	5.8	5.3	10.6
Householder with husband present.....	1,797	69	1,727	5.5	2.2	5.9	3.8
Wife of householder.....	5,947	231	5,716	18.2	7.3	19.4	3.9
Other relative <sup>2</sup> .....	1,432	89	1,343	4.4	2.8	4.6	6.2
Poor by own income.....	684	79	606	2.1	2.5	2.1	11.5
Not poor by own income.....	748	11	737	2.3	.3	2.5	1.4

<sup>1</sup> Living arrangements as of March 2000. Poverty status in 1999 as reflected by income of unrelated individual or family money income for year compared with official poverty income criterion for families of appropriate size and composition.

<sup>2</sup> Aged family members who are neither the family householder nor the spouse of the householder. Official poverty classification is based on combined income of all related persons living together. Persons in this group are classified here on the basis of official poverty criteria for family income and on a comparison of their own income with official poverty criteria for elderly persons maintaining their own households. The hidden poor are other relatives in nonpoor households whose own income is below the official poverty line for unrelated individuals or married couples.

<sup>3</sup> Less than 0.05 percent.

Source: Public use file of the March 2000 Income Supplement, Current Population Survey, U.S. Census Bureau. For a discussion of standard errors of estimated numbers and percentages, see U.S. Census Bureau, *Current Population Reports*, P-60 series.

Table 3.E6.—Aged families receiving Social Security benefits, by share of income from benefits and race, 1999

[Civilian noninstitutionalized population residing in the 50 states and the District of Columbia]

Social Security share of money income for year <sup>1</sup>	Individuals aged 65 or older living alone or with nonrelatives only				Multiperson families with householder aged 65 or older			
	Total	Nonpoor	Poor	Percent poor	Total	Nonpoor	Poor	Percent poor
All races <sup>2</sup>								
Total number (in thousands) .....	10,638	8,543	2,095	...	11,773	11,117	656	...
Total percent .....	100	100	100	20	100	100	100	6
No Social Security benefits .....	8	6	16	41	8	7	35	23
Some Social Security benefits .....	92	94	84	18	92	93	65	4
Less than one-fourth of income .....	9	11	1	2	23	25	2	(3)
One-fourth up to one-half of income .....	19	23	3	3	26	27	7	1
One-half up to three-fourths of income .....	21	24	10	9	20	21	6	2
Three-fourths or more of income .....	43	36	70	32	22	21	50	12
White								
Total number (in thousands) .....	9,463	7,835	1,627	...	10,299	9,881	418	...
Total percent .....	100	100	100	17	100	100	100	4
No Social Security benefits .....	7	5	16	39	7	6	37	20
Some Social Security benefits .....	93	95	84	15	93	94	63	3
Less than one-fourth of income .....	9	11	1	2	23	24	1	(3)
One-fourth up to one-half of income .....	20	23	3	3	26	27	8	1
One-half up to three-fourths of income .....	22	24	9	7	21	22	6	1
Three-fourths or more of income .....	42	36	70	29	22	21	48	9
Black								
Total number (in thousands) .....	989.6	574.7	414.9	...	972	835	137	...
Total percent .....	100	100	100	42	100	100	100	14
No Social Security benefits .....	11	9	14	52	10	8	25	35
Some Social Security benefits .....	89	91	86	41	90	92	75	12
Less than one-fourth of income .....	7	12	(3)	(3)	25	29	5	3
One-fourth up to one-half of income .....	13	20	3	10	24	27	8	5
One-half up to three-fourths of income .....	17	21	13	30	14	16	6	6
Three-fourths or more of income .....	51	38	70	57	26	21	56	30

<sup>1</sup> Payments under Old-Age, Survivors, and Disability Insurance program any time in 1999 to any family member as reported in the March 2000 Current Population Survey.

<sup>2</sup> Includes other races.

<sup>3</sup> Less than 0.05 percent.

Source: Public use file of the March 2000 Income Supplement, Current Population Survey, U.S. Census. For a discussion of standard errors of estimated numbers and percentages, see Bureau of the Census, *Current Population Reports*, P-60 series.

### 3.E Poverty

Table 3.E8.—Poverty guidelines for families of specified size, 1965–2001<sup>1,2</sup>

Date of issuance <sup>3</sup>	1 person	2 persons	3 persons	4 persons	5 persons	6 persons	7 persons	8 persons	Increment <sup>4</sup>
December 1965	\$1,540	\$1,990	\$2,440	\$3,130	\$3,685	\$4,135	\$4,635	\$5,135	\$500
August 1967	1,600	2,000	2,500	3,200	3,800	4,200	4,700	5,300	500
September 1968	1,600	2,100	2,600	3,300	3,900	4,400	4,900	5,400	500
September 1969	1,800	2,400	3,000	3,600	4,200	4,800	5,400	6,000	600
December 1970	1,900	2,500	3,100	3,800	4,400	5,000	5,600	6,200	600
November 1971	2,000	2,600	3,300	4,000	4,700	5,300	5,900	6,500	600
October 1972	2,100	2,725	3,450	4,200	4,925	5,550	6,200	6,850	650
March 1973	2,200	2,900	3,600	4,300	5,000	5,700	6,400	7,100	700
May 1974	2,330	3,070	3,810	4,550	5,290	6,030	6,770	7,510	740
March 1975	2,590	3,410	4,230	5,050	5,870	6,690	7,510	8,330	820
April 1976	2,800	3,700	4,600	5,500	6,400	7,300	8,200	9,100	900
April 1977	2,970	3,930	4,890	5,850	6,810	7,770	8,730	9,690	960
April 1978	3,140	4,160	5,180	6,200	7,220	8,240	9,260	10,280	1,020
May 1979	3,400	4,500	5,600	6,700	7,800	8,900	10,000	11,100	1,100
April 1980	3,790	5,010	6,230	7,450	8,670	9,890	11,110	12,330	1,220
March 1981	4,310	5,690	7,070	8,450	9,830	11,210	12,590	13,970	1,380
April 1982	4,680	6,220	7,760	9,300	10,840	12,380	13,920	15,460	1,540
February 1983	4,860	6,540	8,220	9,900	11,580	13,260	14,940	16,620	1,680
February 1984	4,980	6,720	8,460	10,200	11,940	13,680	15,420	17,160	1,740
March 1985	5,250	7,050	8,850	10,650	12,450	14,250	16,050	17,850	1,800
February 1986	5,360	7,240	9,120	11,000	12,880	14,760	16,640	18,520	1,880
February 1987	5,500	7,400	9,300	11,200	13,100	15,000	16,900	18,800	1,900
February 1988	5,770	7,730	9,690	11,650	13,610	15,570	17,530	19,490	1,960
February 1989	5,980	8,020	10,060	12,100	14,140	16,180	18,220	20,260	2,040
February 1990	6,280	8,420	10,560	12,700	14,840	16,980	18,120	21,260	2,140
February 1991	6,620	8,880	11,140	13,400	15,660	17,920	20,180	22,440	2,260
February 1992	6,810	9,190	11,570	13,950	16,330	18,710	21,090	23,470	2,380
February 1993	6,970	9,430	11,890	14,350	16,810	19,270	21,730	24,190	2,460
February 1994	7,360	9,840	12,320	14,800	17,280	19,760	22,240	24,720	2,480
February 1995	7,470	10,030	12,590	15,150	17,710	20,270	22,830	25,390	2,560
March 1996	7,740	10,360	12,980	15,600	18,220	20,840	23,460	26,080	2,620
March 1997	7,890	10,610	13,330	16,050	18,770	21,490	24,210	26,960	2,720
February 1998	8,050	10,850	13,650	16,450	19,250	22,050	24,850	27,650	2,800
March 1999	8,240	11,060	13,880	16,700	19,520	22,340	25,160	27,980	2,820
February 2000	8,350	11,250	14,150	17,050	19,950	22,850	25,750	28,650	2,900
February 2001	8,590	11,610	14,630	17,650	20,670	23,690	26,710	29,730	3,020

<sup>1</sup> Except for Alaska and Hawaii. Guidelines for Alaska and Hawaii since 1980 are:

Year	Alaska		Hawaii	
	1 person	Increment	1 person	Increment
1980	\$4,760	\$1,520	\$4,370	\$1,400
1981	5,410	1,720	4,980	1,580
1982	5,870	1,920	5,390	1,770
1983	6,080	2,100	5,600	1,930
1984	6,240	2,170	5,730	2,000
1985	6,560	2,250	6,040	2,070
1986	6,700	2,350	6,170	2,160
1987	6,860	2,380	6,310	2,190
1988	7,210	2,450	6,650	2,250
1989	7,480	2,550	6,870	2,350
1990	7,840	2,680	7,230	2,460
1991	8,290	2,820	7,610	2,600
1992	8,500	2,980	7,830	2,740
1993	8,700	3,080	8,040	2,820
1994	9,200	3,100	8,470	2,850
1995	9,340	3,200	8,610	2,940
1996	9,660	3,280	8,910	3,010
1997	9,870	3,400	9,070	3,130
1998	10,070	3,500	9,260	3,220
1999	10,320	3,520	9,490	3,240
2000	10,430	3,630	9,590	3,340
2001	10,730	3,780	9,890	3,470

Separate figures for Alaska and Hawaii reflect Office of Economic Opportunity administrative practice beginning in the 1966–70 period. The U.S. Census Bureau, producer of the primary version of the poverty measure (the poverty thresholds), does not produce separate figures for Alaska and Hawaii.

<sup>2</sup> Before 1983, the guidelines shown are for nonfarm families only.

<sup>3</sup> The guidelines are effective from the date of issuance (unless otherwise specified by a particular program using them).

<sup>4</sup> Add this amount for each additional family member. Before 1973, increments between some of the smaller family sizes differed from the increment shown in the table. Beginning in 1973, the increment has been the same between all family sizes in each year's set of guidelines.

CONTACT: Gordon Fisher (202) 690-5880 for further information.



Table 4.A1.—Old-Age and Survivors Insurance, 1937–2000

[In millions]

Calendar year	Receipts					Expenditures				Assets	
	Total	Net contributions <sup>1</sup>	Income from taxation of benefits	Payments from the general fund of the Treasury <sup>2</sup>	Net interest <sup>3</sup>	Total	Benefit payments <sup>4</sup>	Administrative expenses	Transfers to Railroad Retirement program	Net increase during year	Amount at end of period
1937.....	\$767	\$765	...	...	\$2	\$1	\$1	...	...	\$766	\$766
1938.....	375	360	...	...	15	10	10	...	...	366	1,132
1939.....	607	580	...	...	27	14	14	...	...	592	1,724
1940.....	368	325	...	...	43	62	35	\$26	...	306	2,031
1941.....	845	789	...	...	56	114	88	26	...	731	2,762
1942.....	1,085	1,012	...	...	72	159	131	28	...	926	3,688
1943.....	1,328	1,239	...	...	88	195	166	29	...	1,132	4,820
1944.....	1,422	1,316	...	...	107	238	209	29	...	1,184	6,005
1945.....	1,420	1,285	...	...	134	304	274	30	...	1,116	7,121
1946.....	1,447	1,295	...	...	152	418	378	40	...	1,029	8,150
1947.....	1,722	1,557	...	\$1	164	512	466	46	...	1,210	9,360
1948.....	1,969	1,685	...	3	281	607	556	51	...	1,362	10,722
1949.....	1,816	1,666	...	4	146	721	667	54	...	1,094	11,816
1950.....	2,928	2,667	...	4	257	1,022	961	61	...	1,905	13,721
1951.....	3,784	3,363	...	4	417	1,966	1,885	81	...	1,818	15,540
1952.....	4,184	3,819	...	...	365	2,282	2,194	88	...	1,902	17,442
1953.....	4,359	3,945	...	...	414	3,094	3,006	88	...	1,265	18,707
1954.....	5,610	5,163	...	...	447	3,741	3,670	92	-\$21	1,869	20,576
1955.....	6,167	5,713	...	...	454	5,079	4,968	119	-7	1,087	21,663
1956.....	6,697	6,172	...	...	526	5,841	5,715	132	-5	856	22,519
1957.....	7,381	6,825	...	...	556	7,507	7,347	162	-2	-126	22,393
1958.....	8,117	7,566	...	...	552	8,646	8,327	194	124	-528	21,864
1959.....	8,584	8,052	...	...	532	10,308	9,842	184	282	-1,724	20,141
1960.....	11,382	10,866	...	...	516	11,198	10,677	203	318	184	20,324
1961.....	11,833	11,285	...	...	548	12,432	11,862	239	332	-599	19,725
1962.....	12,585	12,059	...	...	526	13,973	13,356	256	361	-1,388	18,337
1963.....	15,063	14,541	...	...	521	14,920	14,217	281	423	143	18,480
1964.....	16,258	15,689	...	...	569	15,613	14,914	296	403	645	19,125
1965.....	16,610	16,017	...	...	593	17,501	16,737	328	436	-890	18,235
1966.....	21,302	20,580	...	78	644	18,967	18,267	256	444	2,335	20,570
1967.....	24,034	23,138	...	78	818	20,382	19,468	406	508	3,652	24,222
1968.....	25,040	23,719	...	382	939	23,557	22,643	476	438	1,483	25,704
1969.....	29,554	27,947	...	442	1,165	25,176	24,210	474	491	4,378	30,082
1970.....	32,220	30,256	...	449	1,515	29,848	28,798	471	579	2,371	32,454
1971.....	35,877	33,723	...	488	1,667	34,542	33,414	514	613	1,335	33,789
1972.....	40,050	37,781	...	475	1,794	38,522	37,124	674	724	1,528	35,318
1973.....	48,344	45,975	...	442	1,928	47,175	45,745	647	783	1,169	36,487
1974.....	54,688	52,081	...	447	2,159	53,397	51,623	865	909	1,291	37,777
1975.....	59,605	56,816	...	425	2,364	60,395	58,517	896	982	-790	36,987
1976.....	66,276	63,362	...	614	2,301	67,876	65,705	959	1,212	-1,600	35,388
1977.....	72,412	69,572	...	613	2,227	75,309	73,121	981	1,208	-2,897	32,491
1978.....	78,094	75,471	...	615	2,008	83,064	80,361	1,115	1,589	-4,971	27,520
1979.....	90,274	87,919	...	557	1,797	93,133	90,573	1,113	1,448	-2,860	24,660
1980.....	105,841	103,456	...	540	1,845	107,678	105,083	1,154	1,442	-1,837	22,823
1981.....	125,361	122,627	...	675	2,060	126,695	123,803	1,307	1,585	-1,334	21,490
1982.....	125,198	123,673	...	680	845	142,119	138,806	1,519	1,793	<sup>5</sup> 598	22,088
1983.....	150,584	138,337	...	5,541	6,706	152,999	149,221	1,528	2,251	-2,416	19,672
1984.....	169,328	164,122	\$2,835	105	2,266	161,883	157,841	1,638	2,404	7,445	27,117
1985.....	184,239	176,958	3,208	2,203	1,871	171,150	167,248	1,592	2,310	<sup>5</sup> 8,725	35,842
1986.....	197,393	190,741	3,424	160	3,069	181,000	176,813	1,601	2,585	<sup>5</sup> 3,239	39,081
1987.....	210,736	202,735	3,257	55	4,690	187,668	183,587	1,524	2,557	23,068	62,149
1988.....	240,770	229,775	3,384	43	7,568	200,020	195,454	1,776	2,790	40,750	102,899
1989.....	264,653	250,195	2,439	34	11,985	212,489	207,971	1,673	2,845	52,164	155,063
1990.....	286,653	267,530	4,848	-2,089	16,363	227,519	222,987	1,563	2,969	59,134	214,197
1991.....	299,286	272,574	5,864	19	20,829	245,634	240,467	1,792	3,375	53,652	267,849
1992.....	311,162	280,992	5,852	14	24,303	259,861	254,883	1,830	3,148	51,301	319,150
1993.....	323,277	290,905	5,335	10	27,027	273,104	267,755	1,996	3,353	50,173	369,322
1994.....	328,271	293,323	4,995	7	29,946	284,133	279,068	1,645	3,420	44,138	413,460
1995.....	342,801	304,620	5,490	-129	32,820	297,760	291,630	2,077	4,052	45,041	458,502
1996.....	363,741	321,557	6,471	7	35,706	308,217	302,861	1,802	3,554	55,524	514,026
1997.....	397,169	349,946	7,426	2	39,795	322,073	316,257	2,128	3,688	75,096	589,121
1998.....	424,848	371,207	9,149	1	44,491	332,324	326,762	1,899	3,662	92,524	681,645
1999.....	457,040	396,352	10,899	(6)	49,788	339,874	334,383	1,809	3,681	117,167	798,812
2000.....	490,513	421,391	11,594	...	57,529	358,339	352,652	2,149	3,538	132,174	930,986

See footnotes following table 4.A3.

CONTACT: Jeff Kunkel (410) 965-3013 for further information.

## 4.A OASDI: Trust Funds

Table 4.A2.—Disability Insurance, 1957–2000

[In millions]

Calendar year	Receipts					Expenditures					Assets	
	Total	Net contributions <sup>1</sup>	Income from taxation of benefits	Payments from the general fund of the Treasury <sup>2</sup>	Net interest <sup>3</sup>	Total	Benefit payments <sup>4</sup>	Administrative expenses	Transfers to Railroad Retirement program	Net increase during year	Amount at end of period	
1957.....	\$709	\$702	...	...	\$7	\$59	\$57	\$3	...	\$649	\$649	
1958.....	991	966	...	...	25	261	249	12	...	729	1,379	
1959.....	931	891	...	...	40	485	457	50	-\$22	447	1,825	
1960.....	1,063	1,010	...	...	53	600	568	36	-5	464	2,289	
1961.....	1,104	1,038	...	...	66	956	887	64	5	148	2,437	
1962.....	1,114	1,046	...	...	68	1,183	1,105	66	11	-69	2,368	
1963.....	1,165	1,099	...	...	66	1,297	1,210	68	20	-133	2,235	
1964.....	1,218	1,154	...	...	64	1,407	1,309	79	19	-188	2,047	
1965.....	1,247	1,188	...	...	59	1,687	1,573	90	24	-440	1,606	
1966.....	2,079	2,006	...	\$16	58	1,947	1,784	137	25	133	1,739	
1967.....	2,379	2,286	...	16	78	2,089	1,950	109	31	290	2,029	
1968.....	3,454	3,316	...	32	106	2,458	2,311	127	20	996	3,025	
1969.....	3,792	3,599	...	16	177	2,716	2,557	138	21	1,075	4,100	
1970.....	4,774	4,481	...	16	277	3,259	3,085	164	10	1,514	5,614	
1971.....	5,031	4,620	...	50	361	4,000	3,783	205	13	1,031	6,645	
1972.....	5,572	5,107	...	51	414	4,759	4,502	233	24	813	7,457	
1973.....	6,443	5,932	...	52	458	5,973	5,764	190	20	470	7,927	
1974.....	7,378	6,826	...	52	500	7,196	6,957	217	22	182	8,109	
1975.....	8,035	7,444	...	90	502	8,790	8,505	256	29	-754	7,354	
1976.....	8,757	8,233	...	103	422	10,366	10,055	285	26	-1,609	5,745	
1977.....	9,570	9,138	...	128	304	11,945	11,547	399	(5)	-2,375	3,370	
1978.....	13,810	13,413	...	142	256	12,954	12,599	325	30	856	4,226	
1979.....	15,590	15,114	...	118	358	14,186	13,786	371	30	1,404	5,630	
1980.....	13,871	13,255	...	130	485	15,872	15,515	368	-12	-2,001	3,629	
1981.....	17,078	16,738	...	168	172	17,658	17,192	436	29	-580	3,049	
1982.....	22,715	21,995	...	174	546	17,992	17,376	590	26	<sup>6</sup> -358	2,691	
1983.....	20,682	17,991	...	1,121	1,569	18,177	17,524	625	28	2,505	5,195	
1984.....	17,309	15,945	\$190	...	1,174	18,546	17,898	626	22	-1,237	3,959	
1985.....	19,301	17,191	222	1,017	870	19,478	18,827	608	43	<sup>6</sup> 2,363	6,321	
1986.....	19,439	18,399	238	...	803	20,522	19,853	600	68	<sup>6</sup> 1,459	7,780	
1987.....	20,303	19,691	<sup>7</sup> -36	...	648	21,425	20,519	849	57	-1,122	6,658	
1988.....	22,699	22,039	61	...	600	22,494	21,695	737	61	206	6,864	
1989.....	24,795	23,993	95	...	707	23,753	22,911	754	88	1,041	7,905	
1990.....	28,791	28,539	144	-775	883	25,616	24,829	707	80	3,174	11,079	
1991.....	30,390	29,137	190	...	1,063	28,571	27,695	794	82	1,819	12,898	
1992.....	31,430	30,136	232	...	1,062	32,004	31,112	834	58	-574	12,324	
1993.....	32,301	31,185	281	...	835	35,662	34,613	966	83	-3,361	8,963	
1994.....	52,841	51,373	311	...	1,157	38,879	37,744	1,029	106	13,962	22,925	
1995.....	56,696	54,401	341	-203	2,158	42,055	40,923	1,064	68	14,641	37,566	
1996.....	60,710	57,325	373	...	3,012	45,351	44,189	1,160	2	15,359	52,924	
1997.....	60,499	56,037	470	...	3,992	47,034	45,695	1,280	59	13,465	66,389	
1998.....	64,357	58,966	558	...	4,832	49,931	48,207	1,567	157	14,425	80,815	
1999.....	69,541	63,203	661	...	5,677	53,035	51,381	1,519	135	16,507	97,321	
2000.....	77,920	71,093	721	-836	6,942	56,782	54,983	1,639	159	21,138	118,459	

<sup>1</sup> Beginning in 1983, includes transfers from the general fund of the Treasury representing contributions that would have been paid on deemed wage credits for military service in 1957 and later, if such credits were considered to be covered wages.

<sup>2</sup> Includes payments (1) in 1966 and later, for costs of noncontributory wage credits for military service performed before 1957; and (2) in 1971–1982, for costs of deemed wage credits for military service performed after 1956.

<sup>3</sup> Net interest includes net profits or losses on marketable investments. Beginning in 1967, administrative expenses are charged to the trust fund on an estimated basis, with a final adjustment, including interest, made in the following fiscal year. The amounts of these interest adjustments are included in net interest. Beginning in July 1974, the figures shown include relatively small amounts of gifts to the fund. Figures for 1983–1986 reflect payments from a borrowing trust fund to a lending trust fund for interest on amounts owed under the interfund borrowing provisions. During 1983–1990, interest paid from the trust fund to the general fund of the Treasury on advance tax transfers is reflected. The amount shown for 1985 includes an interest adjustment of \$14.8 million on unnegotiated checks issued before April 1985.

<sup>4</sup> Beginning in 1966, includes payments for vocational rehabilitation services furnished to disabled persons receiving benefits because of their disabilities. Beginning in 1983, amounts are reduced by amount of reimbursement for unnegotiated benefit checks.

<sup>5</sup> Less than \$500,000.

<sup>6</sup> Amount equals total receipts less total expenditures, less amounts loaned or plus amounts repaid under interfund borrowing provisions.

<sup>7</sup> Reflects \$195 million in transfers from the DI trust fund to the general fund of the Treasury to correct estimated amounts transferred for calendar years 1984 and 1985.

CONTACT: Jeff Kunkel (410) 965-3013 for further information.

Table 4.A3.—Combined OASI and DI, 1957–2000

[In millions]

Calendar year	Receipts					Expenditures				Assets	
	Total	Net contributions <sup>1</sup>	Income from taxation of benefits	Payments from the general fund of the Treasury <sup>2</sup>	Net interest <sup>3</sup>	Total	Benefit payments <sup>4</sup>	Administrative expenses	Transfers to Railroad Retirement program	Net increase during year	Amount at end of period
1957.....	\$8,090	\$7,527	...	...	\$563	\$7,567	\$7,404	\$164	-\$2	\$523	\$23,042
1958.....	9,108	8,531	...	...	577	8,907	8,576	207	124	201	23,243
1959.....	9,516	8,943	...	...	572	10,793	10,298	234	260	-1,277	21,966
1960.....	12,445	11,876	...	...	569	11,798	11,245	240	314	647	22,613
1961.....	12,937	12,323	...	...	614	13,388	12,749	303	337	-451	22,162
1962.....	13,699	13,105	...	...	594	15,156	14,461	322	372	-1,457	20,705
1963.....	16,227	15,640	...	...	587	16,217	15,427	348	442	10	20,715
1964.....	17,476	16,843	...	...	633	17,020	16,223	375	422	456	21,172
1965.....	17,857	17,205	...	...	651	19,187	18,311	418	459	-1,331	19,841
1966.....	23,381	22,585	...	\$94	702	20,913	20,051	393	469	2,467	22,308
1967.....	26,413	25,424	...	94	896	22,471	21,417	515	539	3,942	26,250
1968.....	28,493	27,034	...	414	1,045	26,015	24,954	603	458	2,479	28,729
1969.....	33,346	31,546	...	458	1,342	27,892	26,767	612	513	5,453	34,182
1970.....	36,993	34,737	...	465	1,791	33,108	31,884	635	589	3,886	38,068
1971.....	40,908	38,343	...	538	2,027	38,542	37,197	719	626	2,366	40,434
1972.....	45,622	42,888	...	526	2,208	43,281	41,625	907	749	2,341	42,775
1973.....	54,787	51,907	...	494	2,386	53,148	51,508	837	802	1,639	44,414
1974.....	62,066	58,907	...	499	2,660	60,593	58,581	1,082	931	1,472	45,886
1975.....	67,640	64,259	...	515	2,866	69,184	67,022	1,152	1,010	-1,544	44,342
1976.....	75,034	71,595	...	717	2,722	78,242	75,759	1,244	1,239	-3,209	41,133
1977.....	81,982	78,710	...	741	2,531	87,254	84,667	1,379	1,208	-5,272	35,861
1978.....	91,903	88,883	...	757	2,264	96,018	92,960	1,440	1,618	-4,115	31,746
1979.....	105,864	103,034	...	675	2,155	107,320	104,359	1,483	1,477	-1,456	30,291
1980.....	119,712	116,711	...	670	2,330	123,550	120,598	1,522	1,430	-3,838	26,453
1981.....	142,438	139,364	...	843	2,231	144,352	140,995	1,743	1,614	-1,914	24,539
1982.....	147,913	145,667	...	854	1,391	160,111	156,182	2,109	1,820	<sup>5</sup> 239	24,778
1983.....	171,266	156,328	...	6,662	8,276	171,177	166,745	2,153	2,279	89	24,867
1984.....	186,637	180,067	\$3,025	105	3,440	180,429	175,739	2,264	2,426	6,208	31,075
1985.....	203,540	194,149	3,430	3,220	2,741	190,628	186,075	2,200	2,353	<sup>5</sup> 11,088	42,163
1986.....	216,833	209,140	3,662	160	3,871	201,522	196,667	2,202	2,653	<sup>5</sup> 4,698	46,861
1987.....	231,039	222,425	3,221	55	5,338	209,093	204,106	2,373	2,614	21,946	68,807
1988.....	263,469	251,814	3,445	43	8,168	222,514	217,149	2,513	2,851	40,955	109,762
1989.....	289,448	274,189	2,534	34	12,692	236,242	230,882	2,427	2,934	53,206	162,968
1990.....	315,443	296,070	4,992	-2,864	17,245	253,135	247,816	2,270	3,049	62,309	225,277
1991.....	329,676	301,711	6,054	19	21,892	274,205	268,162	2,587	3,457	55,471	280,747
1992.....	342,591	311,128	6,084	14	25,365	291,865	285,995	2,664	3,206	50,726	331,473
1993.....	355,578	322,090	5,616	10	27,862	308,766	302,368	2,963	3,435	46,812	378,285
1994.....	381,111	344,695	5,306	7	31,103	323,011	316,812	2,674	3,526	58,100	436,385
1995.....	399,497	359,021	5,831	-332	34,977	339,815	332,554	3,141	4,120	59,683	496,068
1996.....	424,451	378,881	6,844	7	38,718	353,569	347,050	2,962	3,556	70,883	566,950
1997.....	457,668	405,984	7,896	2	43,787	369,108	361,952	3,409	3,747	88,560	655,510
1998.....	489,204	430,174	9,707	1	49,323	382,255	374,969	3,467	3,819	106,950	762,460
1999.....	526,582	459,556	11,559	(6)	55,466	392,908	385,765	3,328	3,816	133,673	896,133
2000.....	568,433	492,484	12,314	-836	64,471	415,121	407,635	3,788	3,698	153,312	1,049,445

## Footnotes to tables 4.A1 and 4.A3

<sup>1</sup> Beginning in 1983, includes transfers from the general fund of the Treasury representing contributions that would have been paid on deemed wage credits for military service in 1957 and later, if such credits were considered to be covered wages.

<sup>2</sup> Includes payments (1) in 1947–51 and in 1966 and later, for costs of noncontributory wage credits for military service performed before 1957; (2) in 1971–1982, for costs of deemed wage credits for military service performed after 1956; and (3) in 1968 and later, for costs of benefits to certain uninsured persons who attained age 72 before 1968.

<sup>3</sup> Net interest includes net profits or losses on marketable investments. Beginning in 1967, administrative expenses are charged to the trust fund on an estimated basis, with a final adjustment, including interest, made in the following fiscal year. The amounts of these interest adjustments are included in net interest. Beginning in October 1973, the figures shown include relatively small amounts of gifts to the fund. Figures for 1983–1986 reflect payments from a borrowing trust fund to a lending trust fund for interest on amounts owed under the interfund borrowing provisions. During 1983–1990, interest paid from the trust fund to the general fund of the Treasury on advance tax transfers is reflected. For the OASI trust fund, the amount shown for 1985 includes an interest adjustment of \$88 million on unnegotiated checks issued before April 1985. For the OASI and DI trust funds, combined, the amount shown for 1985 includes an interest adjustment of \$102.8 million on unnegotiated checks issued before April 1985.

<sup>4</sup> Beginning in 1966, includes payments for vocational rehabilitation services furnished to disabled persons receiving benefits because of their disabilities. Beginning in 1983, amounts are reduced by amount of reimbursement for unnegotiated benefit checks.

<sup>5</sup> Amount equals total receipts less total expenditures, plus amounts borrowed or less amounts repaid under interfund borrowing provisions.

<sup>6</sup> Less than \$500,000.

CONTACT: Jeff Kunkel (410) 965-3013 for further information.

## 4.A OASDI: Trust Funds

Table 4.A4.—Total annual benefits paid, by type of benefit and trust fund, and as percent of personal income, 1937–2000

[Amounts in millions]

Year	Total benefits	Cash benefits <sup>1</sup>		Service benefits		Rehabilitation services <sup>2</sup>		Personal income <sup>3</sup>	Total benefits as percent of personal income
		Old-Age and Survivors Insurance <sup>4</sup>	Disability Insurance	Hospital Insurance	Supplementary Medical Insurance	Old-Age and Survivors Insurance	Disability Insurance		
1937.....	\$1	\$1	...	...	...	...	...	\$74,300	(5)
1938.....	10	10	...	...	...	...	...	68,600	(5)
1939.....	14	14	...	...	...	...	...	73,100	(5)
1940.....	35	35	...	...	...	...	...	78,600	(5)
1941.....	88	88	...	...	...	...	...	96,300	0.1
1942.....	131	131	...	...	...	...	...	123,800	.1
1943.....	166	166	...	...	...	...	...	152,400	.1
1944.....	209	209	...	...	...	...	...	166,300	.1
1945.....	274	274	...	...	...	...	...	171,900	.2
1946.....	378	378	...	...	...	...	...	179,500	.2
1947.....	466	466	...	...	...	...	...	192,100	.2
1948.....	556	556	...	...	...	...	...	211,100	.3
1949.....	667	667	...	...	...	...	...	208,200	.3
1950.....	961	961	...	...	...	...	...	229,900	.4
1951.....	1,885	1,885	...	...	...	...	...	258,700	.7
1952.....	2,194	2,194	...	...	...	...	...	276,100	.8
1953.....	3,006	3,006	...	...	...	...	...	292,600	1.0
1954.....	3,670	3,670	...	...	...	...	...	295,200	1.2
1955.....	4,968	4,968	...	...	...	...	...	316,800	1.6
1956.....	5,715	5,715	...	...	...	...	...	340,000	1.7
1957.....	7,404	7,347	\$57	...	...	...	...	359,300	2.1
1958.....	8,576	8,327	249	...	...	...	...	370,000	2.3
1959.....	10,298	9,842	457	...	...	...	...	394,000	2.6
1960.....	11,245	10,677	568	...	...	...	...	412,700	2.7
1961.....	12,749	11,862	887	...	...	...	...	430,300	3.0
1962.....	14,461	13,356	1,105	...	...	...	...	457,900	3.2
1963.....	15,427	14,217	1,210	...	...	...	...	481,000	3.2
1964.....	16,223	14,914	1,309	...	...	...	...	515,800	3.1
1965.....	18,311	16,737	1,573	...	...	...	...	557,400	3.3
1966.....	21,070	18,267	1,781	\$891	\$128	(6)	\$3	606,400	3.5
1967.....	25,967	19,468	1,939	3,353	1,197	(6)	11	650,400	4.0
1968.....	30,651	22,642	2,294	4,179	1,518	\$1	16	714,500	4.3
1969.....	33,371	24,209	2,542	4,739	1,865	1	15	780,800	4.3
1970.....	38,982	28,796	3,067	5,124	1,975	2	18	841,100	4.6
1971.....	45,065	33,413	3,758	5,751	2,117	2	24	905,100	5.0
1972.....	50,269	37,122	4,473	6,318	2,325	2	29	994,300	5.1
1973.....	61,091	45,741	5,718	7,057	2,526	3	46	1,113,400	5.5
1974.....	70,996	51,618	6,903	9,099	3,318	5	54	1,225,600	5.8
1975.....	82,611	58,509	8,414	11,315	4,273	9	91	1,331,700	6.2
1976.....	94,180	65,699	9,966	13,340	5,080	6	89	1,475,400	6.4
1977.....	106,443	73,113	11,463	15,737	6,038	8	84	1,637,100	6.5
1978.....	117,894	80,352	12,513	17,682	7,252	9	86	1,848,300	6.4
1979.....	133,691	90,556	13,708	20,623	8,708	18	78	2,081,500	6.4
1980.....	156,298	105,074	15,437	25,064	10,635	8	78	2,323,900	6.7
1981.....	184,450	123,795	17,199	30,342	13,113	8	-8	2,599,400	7.1
1982.....	207,268	138,800	17,338	35,631	15,455	6	38	2,768,400	7.5
1983.....	224,524	149,502	17,530	39,337	18,106	6	42	2,946,900	7.6
1984.....	238,682	157,862	17,900	43,257	19,661	(6)	1	3,274,800	7.3
1985.....	256,723	167,360	18,836	47,580	22,947	(6)	(6)	3,515,000	7.3
1986.....	272,698	176,845	19,847	49,758	26,239	...	9	3,712,400	7.3
1987.....	284,487	183,644	20,512	49,496	30,820	...	16	3,962,500	7.2
1988.....	303,717	195,522	21,692	52,517	33,970	...	16	4,272,100	7.1
1989.....	329,193	207,977	22,873	60,011	38,294	...	38	4,599,800	7.2
1990.....	356,536	222,993	24,803	66,239	42,468	...	32	4,903,200	7.3
1991.....	386,912	240,436	27,662	71,549	47,229	...	36	5,085,400	7.6
1992.....	419,325	254,939	31,091	83,895	49,367	...	33	5,390,400	7.8
1993.....	449,896	267,804	34,598	93,487	53,979	...	28	5,610,000	8.0
1994.....	478,775	279,118	37,717	103,282	58,618	...	40	5,888,000	8.1
1995.....	513,959	291,682	40,898	116,368	64,972	...	39	6,200,900	8.3
1996.....	544,350	302,914	44,174	128,632	68,598	...	31	6,547,400	8.3
1997.....	572,542	316,311	45,659	137,762	72,757	...	53	6,937,000	8.3
1998.....	585,156	326,817	48,173	133,990	76,125	...	51	7,391,000	7.9
1999.....	595,326	334,437	51,331	128,766	80,724	...	68	7,789,600	7.6
2000.....	625,060	352,706	54,938	128,458	88,893	...	63	8,281,700	7.5

<sup>1</sup> Unnegotiated checks not deducted.

<sup>2</sup> Vocational rehabilitation services to disabled workers and disabled children under the 1965 Amendments to the Social Security Act and to disabled widows and widowers under the 1967 Amendments to the Social Security Act.

<sup>3</sup> Data from Bureau of Economic Analysis. Figures subject to revision.

<sup>4</sup> For 1937–1939, refunds and lump-sum death payments under the Social Security Act of 1935.

<sup>5</sup> Less than 0.05 percent.

<sup>6</sup> Less than \$500,000.

CONTACT: Jeff Kunkel (410) 965-3013 for further information.



#### 4.A OASDI: Trust Funds

Table 4.A6.—Total annual benefits<sup>1</sup> paid from DI trust fund, by type of benefit, 1957–2000

[In millions]

Year	Total	Benefits paid to—		
		Disabled workers	Wives and husbands	Children
1957.....	\$57	\$57	...	...
1958.....	249	246	\$1	\$1
1959.....	457	390	29	38
1960.....	568	489	32	48
1961.....	887	724	54	109
1962.....	1,105	888	68	149
1963.....	1,210	965	73	172
1964.....	1,309	1,044	79	186
1965.....	1,573	1,246	95	232
1966.....	1,781	1,394	108	280
1967.....	1,939	1,519	113	307
1968.....	2,294	1,804	131	360
1969.....	2,542	2,014	139	389
1970.....	3,067	2,448	165	454
1971.....	3,758	3,028	192	539
1972.....	4,473	3,626	224	623
1973.....	5,718	4,676	281	760
1974.....	6,903	5,662	320	920
1975.....	8,414	6,908	385	1,121
1976.....	9,966	8,190	447	1,328
1977.....	11,463	9,456	505	1,503
1978.....	12,513	10,315	541	1,657
1979.....	13,708	11,333	581	1,794
1980.....	15,437	12,816	638	1,983
1981.....	17,199	14,379	684	2,136
1982.....	17,338	14,811	652	1,875
1983.....	17,530	15,196	607	1,728
1984.....	17,900	15,623	536	1,741
1985.....	18,836	16,483	545	1,809
1986.....	19,847	17,409	547	1,890
1987.....	20,512	18,053	532	1,926
1988.....	21,692	19,165	529	1,999
1989.....	22,873	20,314	523	2,036
1990.....	24,803	22,113	531	2,159
1991.....	27,662	24,738	550	2,374
1992.....	31,091	27,856	572	2,663
1993.....	34,598	30,913	572	3,112
1994.....	37,717	33,711	579	3,428
1995.....	40,898	36,610	577	3,711
1996.....	44,174	39,625	515	4,034
1997.....	45,659	41,083	479	4,098
1998.....	48,173	43,467	457	4,249
1999.....	51,331	46,459	433	4,439
2000.....	54,938	49,848	421	4,670

<sup>1</sup> Type of benefit estimated. Unnegotiated checks not deducted.

CONTACT: Jeff Kunkel (410) 965-3013 for further information.

Table 4.B1.—Workers, earnings, and Social Security numbers issued, 1937–2000

[Worker estimates based on 1-percent sample]

Year	Workers reported with taxable earnings <sup>1</sup> (in thousands)			Earnings					Social Security numbers issued <sup>2</sup> (in thousands)
	Total	With maximum earnings	New entrants into covered employment <sup>3</sup>	Total in covered employment <sup>4</sup> (in millions)	Reported taxable <sup>1</sup>		Average per worker		
					Amount (in millions)	Percent of total	Total earnings <sup>4</sup>	Reported taxable	
1937.....	32,900	1,031	32,900	\$32,200	\$29,620	92.0	\$979	\$900	37,139
1940.....	35,390	1,196	4,430	35,700	32,970	92.4	1,009	932	5,227
1945.....	46,390	6,361	3,480	71,600	62,950	87.9	1,543	1,357	3,321
1950.....	48,280	13,936	2,520	109,800	87,500	79.7	2,274	1,812	2,891
1951.....	58,120	14,270	6,000	148,900	120,770	81.1	2,562	2,078	4,927
1952.....	59,580	16,606	3,500	159,900	128,640	80.5	2,684	2,159	4,363
1953.....	60,840	19,013	3,090	173,000	135,870	78.5	2,844	2,233	3,464
1954.....	59,610	18,866	2,360	171,900	133,520	77.7	2,884	2,240	2,743
1955.....	65,200	16,704	4,760	196,100	157,540	80.3	3,008	2,416	4,323
1956.....	67,610	19,236	3,660	216,800	170,720	78.8	3,207	2,525	4,376
1957.....	70,590	21,095	3,380	233,900	181,380	77.5	3,314	2,569	3,639
1958.....	69,770	21,328	2,450	236,500	180,720	76.4	3,390	2,590	2,290
1959.....	71,700	19,112	3,180	255,000	202,310	79.3	3,556	2,822	3,388
1960.....	72,530	20,310	3,130	265,200	207,000	78.1	3,656	2,854	3,415
1961.....	72,820	21,265	2,990	270,700	209,640	77.4	3,717	2,879	3,370
1962.....	74,280	23,154	3,360	289,000	219,050	75.8	3,891	2,949	4,519
1963.....	75,540	24,570	3,520	302,300	225,550	74.6	4,002	2,986	8,617
1964.....	77,430	26,717	3,890	324,500	236,390	72.8	4,191	3,053	5,623
1965.....	80,680	29,136	4,620	351,700	250,730	71.3	4,359	3,108	6,131
1966.....	84,600	20,498	5,080	390,700	312,540	80.0	4,618	3,694	6,506
1967.....	87,040	22,948	4,530	422,300	329,960	78.1	4,852	3,791	5,920
1968.....	89,380	19,120	4,830	460,000	375,840	81.7	5,147	4,205	5,862
1969.....	92,060	22,577	5,160	502,800	402,550	80.1	5,462	4,373	6,289
1970.....	93,090	24,224	4,440	531,600	415,600	78.2	5,711	4,464	6,132
1971.....	93,340	26,404	4,470	559,700	426,960	76.3	5,996	4,574	6,401
1972.....	96,240	24,074	5,150	617,900	484,110	78.3	6,420	5,030	9,564
1973.....	99,830	20,250	5,670	686,700	561,850	81.8	6,879	5,628	10,038
1974.....	101,330	15,310	4,940	746,700	636,760	85.3	7,369	6,284	7,998
1975.....	100,200	15,070	4,120	787,600	664,660	84.4	7,860	6,633	8,164
1976.....	102,600	15,330	4,700	874,700	737,700	84.3	8,525	7,190	9,043
1977.....	105,800	15,700	5,070	960,100	816,550	85.0	9,075	7,718	7,724
1978.....	110,600	17,050	5,460	1,092,600	915,600	83.8	9,879	8,278	5,260
1979.....	112,700	11,236	4,883	1,222,200	1,067,000	87.3	10,845	9,468	5,213
1980.....	113,000	9,903	4,243	1,328,800	1,180,700	88.9	11,759	10,449	5,984
1981.....	113,000	8,594	4,090	1,450,900	1,294,100	89.2	12,840	11,452	5,581
1982.....	111,800	7,929	3,408	1,516,600	1,365,300	90.0	13,565	12,212	5,362
1983.....	112,100	7,044	3,914	1,615,200	1,454,100	90.0	14,409	12,971	6,699
1984.....	116,300	7,421	4,743	1,800,800	1,608,800	89.3	15,484	13,833	5,980
1985.....	119,800	7,766	4,756	1,936,800	1,722,600	88.9	16,167	14,379	5,720
1986.....	122,900	7,624	4,641	2,081,800	1,844,400	88.6	16,939	15,007	5,711
1987.....	125,600	7,735	4,956	2,237,000	1,960,000	87.6	17,811	15,605	11,621
1988.....	129,600	8,483	5,489	2,432,800	2,088,400	85.8	18,772	16,114	11,370
1989.....	131,700	8,110	4,856	2,578,700	2,239,500	86.8	19,580	17,005	8,049
1990.....	133,600	7,575	4,012	2,703,800	2,358,000	87.2	20,238	17,650	9,054
1991.....	133,000	7,483	3,541	2,760,500	2,422,500	87.8	20,756	18,214	7,509
1992.....	134,000	7,667	3,918	2,917,800	2,532,900	86.8	21,775	18,902	6,819
1993.....	136,100	7,617	4,204	3,022,900	2,636,100	87.2	22,211	19,369	5,893
1994.....	138,200	7,518	4,591	3,197,000	2,785,200	87.1	23,133	20,153	5,816
1995.....	141,000	8,191	4,621	3,401,800	2,919,100	85.8	24,126	20,703	5,465
1996 <sup>5</sup> .....	143,500	8,693	4,617	3,602,500	3,073,700	85.3	25,105	21,420	5,533
1997 <sup>5</sup> .....	146,300	9,052	4,702	3,879,600	3,285,500	84.7	26,518	22,457	5,413
1998 <sup>5</sup> .....	149,100	9,226	4,871	4,174,700	3,515,600	84.2	27,999	23,579	5,288
1999 <sup>6</sup> .....	151,200	(7)	(7)	4,463,200	3,736,400	83.7	29,519	24,712	5,306
2000 <sup>8</sup> .....	152,900	(7)	(7)	4,772,500	3,982,700	83.5	31,213	26,048	5,476

<sup>1</sup> Relates to wage and salary workers for 1937–1950. Beginning in 1951, includes self-employment. See table 2.A3 for annual maximum taxable earnings.<sup>2</sup> Excludes railroad account numbers. Since program began, 402 million Social Security numbers have been issued. (Some individuals have been issued more than one number.)<sup>3</sup> Workers reported with first taxable earnings under program in specified year. During 1937–1998, 295.1 million different persons reported with taxable earnings.<sup>4</sup> Total wages, including estimated amounts above taxable limit, for 1937–1950. Beginning in 1951, also includes reported total net earnings of self-employed persons.<sup>5</sup> Preliminary data.<sup>6</sup> Taxable earnings are preliminary estimates based on Social Security data; employment and total covered earnings are preliminary estimates based on data from Bureau of Labor Statistics and the National Income and Product Accounts.<sup>7</sup> Data not available.<sup>8</sup> Preliminary estimates based on data from Bureau of Labor Statistics and the National Income and Product Accounts.

CONTACT: Greg Diez/William Kearns (410) 965-0153/6750 for further information.

## 4.B OASDI: Covered Workers

Table 4.B2.—Number and amount of earnings for wage and salary and self-employed workers, 1951–2000

[Worker estimates based on 1-percent sample. See table 4.B1 for wage and salary data before 1951]

Year	Workers reported with taxable earnings <sup>1</sup> (in thousands)		Earnings									
			Wage and salary					Self-employment				
	Wage and salary employment	Self-employment	Total in covered employment <sup>2</sup> (in millions)	Reported taxable		Average per worker		Total in covered employment <sup>3</sup> (in millions)	Reported taxable		Average per self-employed person	
				Amount <sup>4</sup> (in millions)	Percent of total wages	Total wages <sup>2</sup>	Reported taxable <sup>4</sup>		Amount <sup>4</sup> (in millions)	Percent of total self-employment	Total earnings <sup>3</sup>	Reported taxable <sup>4</sup>
1951.....	54,630	4,190	\$132,500	\$111,250	84.0	\$2,425	\$2,036	\$16,400	\$9,520	58.0	\$3,914	\$2,272
1952.....	56,060	4,240	143,500	118,880	82.8	2,560	2,121	16,400	9,760	59.5	3,868	2,302
1953.....	57,220	4,340	156,000	125,840	80.7	2,726	2,199	17,000	10,030	59.0	3,917	2,311
1954.....	55,940	4,350	155,100	123,410	79.6	2,773	2,206	16,800	10,110	60.2	3,862	2,324
1955.....	59,560	6,810	171,600	141,810	82.6	2,881	2,381	24,500	15,730	64.2	3,598	2,310
1956.....	61,560	7,390	188,500	153,010	81.2	3,062	2,486	28,300	17,710	62.6	3,829	2,396
1957.....	64,730	7,150	205,500	163,990	79.8	3,175	2,533	28,400	17,390	61.2	3,972	2,432
1958.....	64,040	7,130	208,000	163,140	78.4	3,248	2,547	28,500	17,580	61.7	3,997	2,466
1959.....	66,000	7,060	225,100	183,620	81.6	3,411	2,782	29,900	18,690	62.5	4,235	2,647
1960.....	66,980	6,870	236,000	188,580	79.9	3,523	2,815	29,200	18,420	63.1	4,250	2,681
1961.....	67,360	6,790	240,700	190,850	79.3	3,573	2,833	30,000	18,790	62.6	4,418	2,767
1962.....	68,890	6,720	257,700	200,130	77.7	3,741	2,905	31,300	18,920	60.4	4,658	2,815
1963.....	70,310	6,590	270,600	206,840	76.4	3,849	2,942	31,700	18,710	59.0	4,810	2,839
1964.....	72,230	6,480	290,900	217,430	74.7	4,027	3,010	33,600	18,960	56.4	5,185	2,926
1965.....	75,430	6,550	311,400	230,830	74.1	4,128	3,060	40,300	19,900	49.4	6,153	3,038
1966.....	79,460	6,630	346,700	287,860	83.0	4,363	3,623	44,000	24,680	56.1	6,637	3,722
1967.....	82,020	6,470	377,500	305,670	81.0	4,603	3,727	44,800	24,290	54.2	6,924	3,754
1968.....	84,470	6,570	413,600	348,500	84.3	4,896	4,126	46,400	27,340	58.9	7,062	4,161
1969.....	87,200	6,350	455,700	375,010	82.3	5,226	4,301	47,100	27,540	58.5	7,417	4,337
1970.....	88,180	6,270	483,600	388,680	80.4	5,484	4,408	48,000	26,920	56.1	7,656	4,293
1971.....	88,460	6,290	509,000	399,550	78.5	5,754	4,517	50,700	27,410	54.1	8,060	4,358
1972.....	91,220	6,600	563,300	452,050	80.3	6,175	4,956	54,600	32,060	58.7	8,273	4,858
1973.....	94,610	7,100	624,400	523,450	83.8	6,600	5,533	62,300	38,400	61.6	8,775	5,408
1974.....	96,190	7,040	681,600	594,400	87.2	7,086	6,179	65,200	42,360	65.0	9,261	6,017
1975.....	94,900	7,000	717,200	621,100	86.6	7,557	6,545	70,400	43,560	61.9	10,057	6,223
1976.....	97,230	7,400	797,200	689,200	86.4	8,199	7,088	76,800	48,500	63.2	10,378	6,554
1977.....	100,450	7,480	879,500	763,600	86.8	8,935	7,602	80,600	52,950	65.7	10,775	7,079
1978.....	104,810	8,040	998,900	856,100	85.7	9,531	8,168	93,700	59,500	63.5	11,654	7,400
1979.....	106,900	8,200	1,122,000	997,500	88.9	10,496	9,331	100,200	69,500	69.4	12,220	8,476
1980.....	107,200	8,200	1,231,000	1,109,000	90.1	11,483	10,345	97,800	71,700	73.3	11,927	8,744
1981.....	107,300	8,250	1,352,000	1,220,000	90.2	12,600	11,370	98,900	74,100	74.9	11,988	8,982
1982.....	105,800	8,550	1,418,000	1,290,000	91.0	13,403	12,193	98,600	75,300	76.4	11,532	8,807
1983.....	105,900	9,200	1,502,000	1,369,000	91.1	14,183	12,927	113,200	85,100	75.2	12,304	9,250
1984.....	109,900	9,900	1,671,500	1,515,000	90.6	15,209	13,785	129,300	93,800	72.5	13,061	9,475
1985.....	113,100	10,600	1,794,500	1,621,000	90.3	15,866	14,332	142,300	101,600	71.4	13,425	9,585
1986.....	115,900	11,200	1,921,000	1,730,800	90.1	16,575	14,934	160,800	113,600	70.6	14,357	10,143
1987.....	118,200	12,000	2,057,100	1,835,100	89.2	17,404	15,525	179,900	124,900	69.4	14,992	10,408
1988.....	122,100	12,400	2,224,700	1,952,000	87.7	18,220	15,987	208,100	136,400	65.5	16,782	11,000
1989.....	123,900	12,900	2,367,800	2,096,000	88.5	19,111	16,917	210,900	143,500	68.0	16,349	11,124
1990.....	126,100	12,500	2,510,000	2,222,000	88.5	19,905	17,621	193,800	136,000	70.2	15,504	10,880
1991.....	125,200	12,800	2,565,000	2,283,000	89.0	20,487	18,235	195,500	139,500	71.4	15,273	10,898
1992.....	126,000	13,100	2,711,000	2,386,000	88.0	21,516	18,937	206,800	146,600	71.0	15,786	11,214
1993.....	128,100	13,200	2,808,900	2,483,400	88.4	21,927	19,386	214,000	152,700	71.4	16,212	11,568
1994.....	130,100	13,300	2,964,100	2,624,500	88.5	22,783	20,173	232,900	160,700	69.0	17,511	12,083
1995.....	132,800	13,500	3,159,100	2,754,300	87.2	23,788	20,740	242,700	164,800	67.9	17,978	12,207
1996 <sup>5</sup> .....	135,100	13,900	3,346,800	2,902,000	86.7	24,773	21,480	255,700	171,700	67.1	18,396	12,353
1997 <sup>5</sup> .....	137,700	14,200	3,608,200	3,105,400	86.1	26,203	22,552	271,400	180,100	66.4	19,113	12,683
1998 <sup>5</sup> .....	140,400	14,400	3,885,100	3,325,800	85.6	27,672	23,688	289,600	189,800	65.5	20,111	13,181
1999 <sup>6</sup> .....	142,400	14,600	4,158,600	3,536,000	85.0	29,204	24,831	304,600	200,400	65.8	20,863	13,726
2000 <sup>7</sup> .....	144,200	14,600	4,446,500	3,770,400	84.8	30,836	26,147	326,000	212,300	65.1	22,329	14,541

<sup>1</sup> Represents total number in specified type of employment. Persons with both types of covered employment during the year are included in each type.

<sup>2</sup> Total wages, including estimated amounts above the taxable limit.

<sup>3</sup> Reported self-employment net earnings.

<sup>4</sup> See table 2.A3 for annual maximum taxable earnings.

<sup>5</sup> Preliminary data.

<sup>6</sup> Taxable earnings are preliminary estimates based on Social Security data; employment and total covered earnings are preliminary estimates based on data from Bureau of Labor Statistics and the National Income and Product Accounts.

<sup>7</sup> Preliminary estimates based on data from Bureau of Labor Statistics and the National Income and Product Accounts.

CONTACT: Greg Diez/William Kearns (410) 965-0153/6750 for further information.



Table 4.B3.—Number of workers and median annual earnings, by type of worker and sex, 1937–1998

[Based on 1-percent sample]

Year	All workers			All wage and salary workers			All self-employed workers <sup>1</sup>		
	Total	Men	Women	Total	Men	Women	Total	Men	Women
Number (in thousands)									
1937.....	32,900	23,810	9,090	32,900	23,810	9,090	...	...	...
1940.....	35,390	25,570	9,820	35,390	25,570	9,820	...	...	...
1945.....	46,390	28,820	17,570	46,390	28,820	17,570	...	...	...
1950.....	48,280	32,620	15,660	48,280	32,620	15,660	...	...	...
1955.....	65,200	43,140	22,060	59,560	38,240	21,320	6,810	5,980	830
1960.....	72,530	47,900	24,630	66,980	43,100	23,880	6,870	5,990	880
1965.....	80,680	51,990	28,690	75,430	47,500	27,930	6,550	5,640	910
1970.....	93,090	57,330	35,760	88,180	53,180	35,000	6,270	5,370	900
1975.....	100,200	59,520	40,680	94,900	55,140	39,760	7,000	5,790	1,210
1980.....	113,000	64,288	48,712	107,200	59,751	47,449	8,200	6,407	1,793
1981.....	113,000	63,984	49,016	107,300	59,562	47,738	8,250	6,361	1,889
1982.....	111,800	63,089	48,711	105,800	58,557	47,243	8,550	6,443	2,107
1983.....	112,100	62,881	49,219	105,900	58,248	47,652	9,200	6,823	2,377
1984.....	116,300	64,700	51,600	109,900	60,009	49,891	9,900	7,196	2,704
1985.....	119,800	66,113	53,687	113,100	61,285	51,815	10,600	7,623	2,977
1986.....	122,900	67,412	55,488	115,900	62,398	53,502	11,200	7,932	3,268
1987.....	125,600	68,591	57,009	118,200	63,306	54,894	12,000	8,450	3,550
1988.....	129,600	70,596	59,004	122,100	65,270	56,830	12,400	8,630	3,770
1989.....	131,700	71,517	60,183	123,900	66,105	57,795	12,900	8,842	4,058
1990.....	133,600	72,291	61,309	126,100	67,064	59,036	12,500	8,526	3,974
1991.....	133,000	71,787	61,213	125,200	66,406	58,794	12,800	8,669	4,131
1992.....	134,000	72,016	61,984	126,000	66,543	59,457	13,100	8,797	4,303
1993.....	136,100	73,154	62,946	128,100	67,673	60,427	13,200	8,840	4,360
1994.....	138,200	73,989	64,211	130,100	68,481	61,619	13,300	8,840	4,460
1995.....	141,000	75,444	65,556	132,800	69,900	62,900	13,500	8,908	4,592
1996 <sup>2</sup> .....	143,500	76,572	66,928	135,100	70,939	64,161	13,900	9,089	4,811
1997 <sup>2</sup> .....	146,300	77,916	68,384	137,700	72,215	65,485	14,200	9,199	5,001
1998 <sup>2</sup> .....	149,100	79,152	69,948	140,400	73,474	66,926	14,400	9,192	5,208
Median earnings <sup>3</sup>									
1937.....	\$761	\$945	\$484	\$761	\$945	\$484	...	...	...
1940.....	746	935	472	746	935	472	...	...	...
1945.....	1,159	1,654	770	1,159	1,654	770	...	...	...
1950.....	1,926	2,532	1,124	1,926	2,532	1,124	...	...	...
1955.....	2,438	3,315	1,351	2,383	3,348	1,338	\$2,397	\$2,550	\$1,552
1960.....	2,894	3,879	1,679	2,833	3,875	1,676	2,903	3,129	1,695
1965.....	3,414	4,685	1,984	3,319	4,630	1,979	3,858	4,242	1,898
1970.....	4,375	6,180	2,735	4,317	6,173	2,770	5,104	5,683	2,360
1975.....	5,803	8,250	3,730	5,790	8,315	3,794	6,700	7,846	3,113
1980.....	8,549	11,963	6,012	8,612	12,166	6,106	8,699	10,572	4,133
1981.....	9,361	12,941	6,690	9,476	13,255	6,807	8,655	10,512	4,330
1982.....	9,924	13,318	7,232	10,109	13,726	7,390	8,175	10,139	4,333
1983.....	10,322	13,687	7,618	10,527	14,130	7,809	8,669	10,686	4,722
1984.....	10,757	14,360	7,878	11,094	15,062	8,088	9,302	11,684	5,113
1985.....	11,265	14,959	8,293	11,638	15,706	8,525	9,877	12,301	5,529
1986.....	11,831	15,579	8,796	12,064	16,025	9,019	10,424	12,908	6,152
1987.....	12,327	16,073	9,261	12,576	16,559	9,500	10,886	13,401	6,573
1988.....	12,825	16,613	9,753	13,086	17,055	9,992	11,478	14,090	7,036
1989.....	13,314	17,014	10,265	13,762	17,800	10,577	11,602	14,538	7,010
1990.....	13,898	17,582	10,837	14,432	18,483	11,199	11,220	14,097	6,898
1991.....	14,278	17,765	11,369	14,859	18,730	11,767	11,125	13,703	7,186
1992.....	14,739	18,208	11,842	15,386	19,292	12,268	11,392	13,966	7,452
1993.....	15,000	18,430	12,093	15,665	19,516	12,546	11,595	14,128	7,720
1994.....	15,560	19,249	12,422	16,010	19,969	12,807	12,051	14,737	8,002
1995.....	16,108	19,907	12,897	16,618	20,672	13,296	12,198	14,931	8,301
1996 <sup>2</sup> .....	16,706	20,699	13,371	17,250	21,499	13,799	12,490	15,289	8,639
1997 <sup>2</sup> .....	17,546	21,697	14,078	18,104	22,559	14,514	12,869	15,854	8,920
1998 <sup>2</sup> .....	18,376	22,766	14,765	18,933	23,604	15,205	13,220	16,324	9,253

<sup>1</sup> Not covered before 1951.

<sup>2</sup> Preliminary data.

<sup>3</sup> For all workers, medians relate to combined earnings from wage and salary employment and self-employment. For all wage and salary workers, medians relate to wages and salaries only.

## 4.B OASDI: Covered Workers

Table 4.B4.—Percent of all workers and self-employed workers with total annual earnings below annual maximum taxable, by sex, 1937–1998

[Based on 1-percent sample]

Year	Annual maximum taxable earnings	All workers <sup>1</sup>			All self-employed workers		
		Total	Men	Women	Total	Men	Women
1937.....	\$3,000	96.9	95.8	99.7	...	...	...
1940.....	3,000	96.6	95.4	99.7	...	...	...
1945.....	3,000	86.3	78.6	98.9	...	...	...
1950.....	3,000	71.1	59.9	94.6	...	...	...
1951.....	3,600	75.5	64.6	96.7	65.4	62.6	83.3
1952.....	3,600	72.1	60.0	95.4	64.1	61.2	83.5
1953.....	3,600	68.8	55.5	93.8	62.9	59.5	83.1
1954.....	3,600	68.4	55.4	93.0	62.6	58.8	82.8
1955.....	4,200	74.4	63.4	95.9	74.0	72.3	86.3
1956.....	4,200	71.6	59.7	94.5	71.2	69.1	86.0
1957.....	4,200	70.1	58.7	93.1	69.6	67.2	85.5
1958.....	4,200	69.4	58.4	91.8	68.8	66.3	85.7
1959.....	4,800	73.3	62.7	94.3	72.0	69.6	88.0
1960.....	4,800	72.0	60.9	93.5	71.6	69.2	87.7
1961.....	4,800	70.8	59.6	92.4	70.3	67.8	86.9
1962.....	4,800	68.8	57.1	91.1	67.9	65.3	85.3
1963.....	4,800	67.5	55.5	90.0	66.3	63.4	85.3
1964.....	4,800	65.5	53.1	88.5	63.8	60.5	84.4
1965.....	4,800	63.9	51.0	87.3	59.5	55.8	82.5
1966.....	6,600	75.8	64.4	95.6	68.3	65.0	88.4
1967.....	6,600	73.6	61.5	94.2	66.7	63.2	87.5
1968.....	7,800	78.6	68.0	96.3	70.3	67.2	89.7
1969.....	7,800	75.5	62.8	96.0	68.3	65.0	89.1
1970.....	7,800	74.0	61.8	93.5	67.8	64.3	88.3
1971.....	7,800	71.7	59.1	91.7	66.7	63.3	86.2
1972.....	9,000	75.0	62.9	93.9	68.8	65.0	89.7
1973.....	10,800	79.7	68.9	96.2	71.1	67.4	91.0
1974.....	13,200	84.9	76.2	97.8	75.7	72.1	94.0
1975.....	14,100	84.9	76.4	97.5	77.8	74.4	93.9
1976.....	15,300	85.1	76.3	97.5	78.6	75.1	94.3
1977.....	16,500	85.2	76.3	97.5	79.3	75.8	94.1
1978.....	17,700	84.6	75.4	97.1	79.3	75.6	94.0
1979.....	22,900	90.0	83.6	98.6	84.3	81.3	95.9
1980.....	25,900	91.2	85.5	98.8	86.9	84.2	96.6
1981.....	29,700	92.4	87.4	99.0	89.4	87.1	97.2
1982.....	32,400	92.9	88.3	98.9	91.0	88.8	97.7
1983.....	35,700	93.7	89.6	99.0	92.0	90.0	97.7
1984.....	37,800	93.6	89.4	98.9	91.8	89.7	97.6
1985.....	39,600	93.5	89.3	98.8	92.0	89.8	97.5
1986.....	42,000	93.8	89.7	98.7	92.3	90.2	97.5
1987.....	43,800	93.9	89.9	98.6	92.5	90.4	97.5
1988.....	45,000	93.5	89.4	98.3	91.7	89.4	97.1
1989.....	48,000	93.8	90.1	98.3	92.4	90.1	97.3
1990.....	51,300	94.3	90.9	98.4	93.3	91.3	97.7
1991.....	53,400	94.4	91.1	98.3	93.6	91.6	97.7
1992.....	55,500	94.3	91.0	98.1	93.6	91.7	97.6
1993.....	57,600	94.4	91.3	98.1	93.7	91.9	97.4
1994.....	60,600	94.6	91.4	98.1	93.9	92.0	97.5
1995.....	61,200	94.2	91.0	97.9	93.9	92.0	97.5
1996 <sup>2</sup> .....	62,700	93.9	90.6	97.7	93.8	92.0	97.4
1997 <sup>2</sup> .....	65,400	93.8	90.5	97.6	93.8	92.0	97.3
1998 <sup>2</sup> .....	68,400	93.7	90.4	97.5	94.6	92.9	97.6

<sup>1</sup> For 1937–1950, relates to wage and salary workers. Beginning in 1951, includes self-employed workers.

<sup>2</sup> Preliminary data.

CONTACT: Greg Diez/William Kearns (410) 965-0153/6750 for further information.





Table 4.B7.—Number of wage and salary workers, by amount of taxable earnings and sex, 1992–1998

[In thousands. Based on 1-percent sample]

Year	Total	Workers with earnings below taxable maximum											Workers with maximum earnings
		\$1–\$999	\$1,000–\$4,999	\$5,000–\$9,999	\$10,000–\$14,999	\$15,000–\$19,999	\$20,000–\$24,999	\$25,000–\$29,999	\$30,000–\$39,999	\$40,000–\$49,999	\$50,000–\$59,999	\$60,000–\$68,399	
Total													
1992.....	126,000	9,357	19,519	17,496	15,765	14,047	11,641	9,058	12,554	7,084	2,422	...	7,057
1993.....	128,100	9,655	19,395	17,521	15,808	14,092	11,807	9,327	12,786	7,371	3,325	...	7,013
1994.....	130,100	9,591	19,403	17,273	15,709	14,194	11,930	9,552	13,230	7,709	4,310	277	6,921
1995.....	132,800	9,213	19,355	17,213	15,766	14,376	12,230	9,867	13,853	8,171	4,662	498	7,597
1996 <sup>1</sup> .....	135,100	9,178	19,216	16,977	15,568	14,239	12,442	10,156	14,432	8,707	5,051	1,053	8,082
1997 <sup>1</sup> .....	137,700	8,815	18,887	16,834	15,385	14,180	12,583	10,443	15,221	9,317	5,516	2,103	8,417
1998 <sup>1</sup> .....	140,400	8,675	18,745	16,505	15,123	14,007	12,680	10,753	16,002	10,000	5,979	3,244	8,687
Men													
1992.....	66,543	4,171	8,743	7,726	7,186	6,587	6,006	5,122	8,069	5,109	1,868	...	5,955
1993.....	67,673	4,429	8,665	7,740	7,223	6,652	6,048	5,222	8,074	5,224	2,527	...	5,869
1994.....	68,481	4,350	8,548	7,546	7,118	6,718	6,068	5,292	8,211	5,372	3,243	222	5,794
1995.....	69,901	4,256	8,510	7,457	7,051	6,814	6,238	5,415	8,448	5,587	3,444	388	6,292
1996 <sup>1</sup> .....	70,939	4,225	8,425	7,314	6,887	6,652	6,290	5,515	8,671	5,842	3,673	800	6,646
1997 <sup>1</sup> .....	72,215	4,117	8,296	7,220	6,744	6,486	6,275	5,591	8,953	6,155	3,929	1,579	6,870
1998 <sup>1</sup> .....	73,475	4,067	8,241	7,071	6,541	6,317	6,211	5,687	9,251	6,485	4,184	2,389	7,030
Women													
1992.....	59,457	5,186	10,776	9,770	8,579	7,460	5,635	3,936	4,485	1,975	554	...	1,103
1993.....	60,427	5,226	10,730	9,781	8,586	7,440	5,759	4,105	4,712	2,147	798	...	1,144
1994.....	61,619	5,241	10,856	9,726	8,592	7,476	5,862	4,260	5,020	2,337	1,067	55	1,127
1995.....	62,900	4,957	10,845	9,756	8,714	7,563	5,992	4,452	5,405	2,584	1,217	110	1,305
1996 <sup>1</sup> .....	64,161	4,953	10,791	9,663	8,680	7,587	6,152	4,641	5,761	2,865	1,378	252	1,436
1997 <sup>1</sup> .....	65,485	4,698	10,591	9,614	8,641	7,694	6,308	4,851	6,269	3,162	1,586	524	1,547
1998 <sup>1</sup> .....	66,925	4,608	10,505	9,434	8,581	7,690	6,469	5,066	6,751	3,515	1,795	854	1,657

<sup>1</sup> Preliminary data.

## 4.B OASDI: Covered Workers

Table 4.B8.—Number of self-employed workers, by age and sex, 1951–1998

[In thousands. Based on 1-percent sample. Age refers to age attained during year]

Year	Total	Under 20	20–24	25–29	30–34	35–39	40–44	45–49	50–54	55–59	60–64	62–64	65–69	70–71	72 or older
Total															
1951.....	4,190	6	71	246	414	543	592	565	503	462	164	215	237	55	117
1955.....	6,810	18	114	362	600	757	865	874	790	737	290	441	497	143	322
1960.....	6,870	19	133	305	560	743	848	929	918	846	316	452	414	101	286
1965.....	6,550	31	143	292	452	664	814	870	913	885	328	411	388	92	267
1970.....	6,270	33	159	348	476	581	729	808	837	839	327	407	388	94	244
1975.....	7,000	67	302	581	679	700	731	813	869	823	317	382	393	95	248
1980.....	8,200	78	380	824	1,052	983	869	812	851	852	307	381	419	112	280
1985.....	10,600	112	527	1,099	1,488	1,522	1,261	1,030	930	929	368	434	455	124	321
1990.....	12,500	152	529	1,123	1,663	1,854	1,736	1,377	1,113	980	381	487	567	150	389
1991.....	12,800	136	521	1,105	1,697	1,897	1,818	1,474	1,170	998	388	486	561	158	391
1992.....	13,100	137	509	1,093	1,678	1,951	1,864	1,589	1,243	1,018	382	484	576	166	410
1993.....	13,200	131	488	1,029	1,650	1,956	1,892	1,647	1,325	1,047	375	481	589	164	426
1994.....	13,300	140	473	989	1,624	1,936	1,945	1,726	1,357	1,070	375	482	580	164	437
1995.....	13,500	143	482	1,005	1,612	1,960	1,964	1,808	1,393	1,097	385	467	574	166	445
1996 <sup>1</sup> .....	13,900	149	489	1,033	1,611	2,012	2,035	1,872	1,472	1,145	404	478	576	164	460
1997 <sup>1</sup> .....	14,200	153	497	1,030	1,557	1,993	2,078	1,901	1,576	1,222	413	498	609	174	499
1998 <sup>1</sup> .....	14,400	167	506	1,033	1,517	1,956	2,102	1,907	1,644	1,297	429	515	620	186	521
Men															
1951.....	3,620	5	61	219	370	478	519	479	430	393	139	179	204	47	97
1955.....	5,980	16	104	335	555	687	773	773	679	631	247	373	420	122	265
1960.....	5,990	16	119	284	515	678	757	812	793	709	260	386	348	83	230
1965.....	5,640	26	127	263	410	598	714	759	772	742	272	339	326	75	217
1970.....	5,370	28	136	306	422	522	642	699	712	695	268	324	320	77	201
1975.....	5,790	57	251	479	564	584	619	680	715	672	255	309	326	78	201
1980.....	6,407	60	305	639	793	752	672	641	681	668	244	301	333	92	226
1985.....	7,623	79	378	782	1,060	1,058	873	730	674	686	278	328	351	97	249
1990.....	8,525	103	346	746	1,112	1,241	1,148	914	762	693	270	355	424	116	295
1991.....	8,668	92	341	726	1,109	1,268	1,204	976	793	699	273	350	418	119	299
1992.....	8,798	89	330	714	1,090	1,289	1,228	1,041	830	706	271	344	427	126	312
1993.....	8,840	89	310	674	1,075	1,290	1,241	1,078	885	713	261	341	436	125	322
1994.....	8,839	89	309	638	1,053	1,269	1,268	1,127	890	723	263	333	423	122	331
1995.....	8,908	97	305	648	1,030	1,271	1,281	1,170	906	735	269	325	413	124	335
1996 <sup>1</sup> .....	9,089	96	308	657	1,021	1,282	1,324	1,201	956	755	277	330	416	119	348
1997 <sup>1</sup> .....	9,199	100	310	636	982	1,253	1,329	1,218	1,011	801	281	343	433	126	376
1998 <sup>1</sup> .....	9,192	105	312	629	935	1,204	1,325	1,198	1,049	838	284	352	436	136	390
Women															
1951.....	570	1	10	27	44	65	73	86	73	69	25	36	33	8	20
1955.....	830	2	10	27	45	70	92	101	111	106	43	68	77	21	57
1960.....	880	3	14	21	45	65	91	117	125	137	56	66	67	18	55
1965.....	910	5	16	29	42	66	100	111	141	143	56	72	62	17	50
1970.....	900	5	23	42	54	59	87	109	125	144	59	65	68	17	43
1975.....	1,210	10	51	102	115	116	112	133	154	151	62	73	67	17	47
1980.....	1,793	18	75	185	259	231	197	171	170	184	63	80	86	20	54
1985.....	2,977	33	149	317	428	464	388	300	256	243	90	106	104	27	72
1990.....	3,975	49	183	377	551	613	588	463	350	287	111	132	142	34	94
1991.....	4,131	44	180	378	588	629	614	499	376	299	115	136	143	39	92
1992.....	4,302	48	179	380	588	662	636	548	413	312	110	140	148	39	98
1993.....	4,360	41	178	355	575	666	651	569	440	334	114	140	153	39	104
1994.....	4,460	51	164	352	572	667	677	599	468	346	112	148	157	42	105
1995.....	4,592	46	177	357	582	689	683	638	487	362	116	142	161	42	109
1996 <sup>1</sup> .....	4,811	53	181	376	590	730	711	671	516	389	128	147	160	45	113
1997 <sup>1</sup> .....	5,001	53	187	394	575	740	749	683	566	421	132	155	176	48	122
1998 <sup>1</sup> .....	5,208	63	194	405	582	752	777	709	595	458	145	163	184	50	131

<sup>1</sup> Preliminary data.

CONTACT: Greg Diez/William Kearns (410) 965-0153/6750 for further information.

Table 4.B9.—Number of self-employed workers, by amount of taxable earnings and sex, 1992–1998

[In thousands. Based on 1-percent sample. Taxable earnings consist of self-employment income and taxable wages (see table 2.A3)]

Year	Total	Workers with earnings below taxable maximum											Workers with maximum earnings
		\$1–\$999	\$1,000–\$4,999	\$5,000–\$9,999	\$10,000–\$14,999	\$15,000–\$19,999	\$20,000–\$24,999	\$25,000–\$29,999	\$30,000–\$39,999	\$40,000–\$49,999	\$50,000–\$59,999	\$60,000–\$68,399	
Total													
1992.....	13,100	593	2,927	2,519	1,599	1,156	882	694	971	612	308	...	839
1993.....	13,200	587	2,866	2,562	1,627	1,149	881	689	990	633	388	...	828
1994.....	13,300	551	2,825	2,510	1,670	1,162	872	714	1,019	645	426	92	814
1995.....	13,500	535	2,781	2,593	1,690	1,192	892	712	1,044	678	444	116	822
1996 <sup>1</sup> .....	13,900	523	2,790	2,665	1,752	1,210	918	731	1,092	714	471	177	856
1997 <sup>1</sup> .....	14,200	533	2,768	2,706	1,753	1,238	936	747	1,115	748	498	284	876
1998 <sup>1</sup> .....	14,400	540	2,732	2,718	1,773	1,250	957	770	1,173	792	516	402	779
Men													
1992.....	8,798	288	1,603	1,606	1,109	827	633	512	746	485	253	...	734
1993.....	8,840	291	1,559	1,632	1,118	809	640	501	760	500	316	...	715
1994.....	8,839	268	1,511	1,552	1,138	820	626	527	772	503	340	77	705
1995.....	8,908	256	1,492	1,581	1,138	826	638	514	782	521	356	96	708
1996 <sup>1</sup> .....	9,089	248	1,473	1,601	1,166	832	649	526	808	546	367	142	731
1997 <sup>1</sup> .....	9,199	260	1,461	1,572	1,147	849	653	527	807	567	387	228	740
1998 <sup>1</sup> .....	9,192	263	1,423	1,546	1,124	828	652	539	843	598	397	321	657
Women													
1992.....	4,302	305	1,323	913	490	329	249	182	225	127	55	...	105
1993.....	4,360	296	1,308	930	509	340	241	188	230	133	73	...	113
1994.....	4,460	282	1,314	957	531	342	247	188	246	142	85	15	109
1995.....	4,592	280	1,289	1,012	552	366	254	198	261	157	88	20	114
1996 <sup>1</sup> .....	4,811	274	1,317	1,064	586	378	269	205	285	168	104	35	126
1997 <sup>1</sup> .....	5,001	273	1,306	1,134	605	389	283	220	308	181	111	55	136
1998 <sup>1</sup> .....	5,208	277	1,309	1,172	649	421	305	230	329	194	119	80	122

<sup>1</sup> Preliminary data.

## 4.B OASDI: Covered Workers

Table 4.B10.—Number of workers, taxable earnings, and contributions, by type of employment and state, 1998

[Preliminary estimates. Based on 1-percent sample]

State <sup>1</sup>	Number of workers reported with taxable earnings <sup>2</sup> (in thousands)			Reported taxable earnings <sup>3</sup> (in millions)			OASDI contributions <sup>4</sup> (in millions)		
	Total, all workers	Wage and salary workers	Self-employed persons	Total	Wages	Self-employment income	Total	Wage and salary employment	Self-employment
Total .....	149,100	140,400	14,400	\$3,515,600	\$3,325,800	\$189,800	\$435,934	\$412,399	\$23,535
Alabama.....	2,296	2,173	203	48,237	45,923	2,314	5,981	5,694	287
Alaska.....	336	313	40	7,756	7,252	504	962	899	63
Arizona.....	2,512	2,383	215	57,045	54,204	2,841	7,074	6,721	352
Arkansas.....	1,371	1,287	140	26,004	24,448	1,556	3,224	3,032	193
California.....	15,878	14,616	1,893	400,181	369,917	30,264	49,622	45,870	3,753
Colorado.....	2,319	2,167	256	55,488	52,038	3,450	6,881	6,453	428
Connecticut.....	1,926	1,810	192	54,661	51,409	3,252	6,778	6,375	403
Delaware.....	474	459	30	11,838	11,491	347	1,468	1,425	43
District of Columbia.....	344	328	27	9,224	8,761	463	1,144	1,086	57
Florida.....	8,015	7,534	803	171,523	162,850	8,672	21,269	20,193	1,075
Georgia.....	4,318	4,089	387	99,937	95,115	4,822	12,392	11,794	598
Hawaii.....	617	577	61	14,660	13,903	757	1,818	1,724	94
Idaho.....	690	647	74	13,725	12,894	831	1,702	1,599	103
Illinois.....	6,738	6,388	594	167,123	159,130	7,994	20,723	19,732	991
Indiana.....	3,440	3,283	295	80,000	76,380	3,620	9,920	9,471	449
Iowa.....	1,707	1,594	200	36,120	33,837	2,283	4,479	4,196	283
Kansas.....	1,511	1,419	164	34,335	32,255	2,080	4,258	4,000	258
Kentucky.....	2,044	1,913	225	41,722	39,493	2,229	5,174	4,897	276
Louisiana.....	2,114	1,987	200	42,467	40,018	2,449	5,266	4,962	304
Maine.....	684	630	91	13,557	12,507	1,050	1,681	1,551	130
Maryland.....	2,905	2,768	242	78,308	75,028	3,280	9,710	9,303	407
Massachusetts.....	3,390	3,163	363	90,105	84,731	5,374	11,173	10,507	666
Michigan.....	5,625	5,388	422	143,344	138,193	5,152	17,775	17,136	639
Minnesota.....	2,953	2,789	301	73,641	69,727	3,914	9,131	8,646	485
Mississippi.....	1,412	1,334	127	27,022	25,492	1,530	3,351	3,161	190
Missouri.....	3,045	2,873	292	65,408	62,108	3,300	8,111	7,701	409
Montana.....	486	441	72	8,781	7,997	784	1,089	992	97
Nebraska.....	1,002	938	115	20,847	19,580	1,268	2,585	2,428	157
Nevada.....	987	944	72	21,890	20,882	1,008	2,714	2,589	125
New Hampshire.....	737	691	80	18,566	17,487	1,078	2,302	2,168	134
New Jersey.....	4,636	4,405	377	134,944	128,996	5,949	16,733	15,995	738
New Mexico.....	883	830	88	17,590	16,621	969	2,181	2,061	120
New York.....	9,776	9,221	912	256,508	244,348	12,160	31,807	30,299	1,508
North Carolina.....	4,448	4,205	421	98,837	93,752	5,085	12,256	11,625	631
North Dakota.....	373	345	51	7,216	6,634	582	895	823	72
Ohio.....	5,984	5,647	550	134,119	127,197	6,921	16,631	15,772	858
Oklahoma.....	1,788	1,666	199	35,189	33,111	2,078	4,363	4,106	258
Oregon.....	1,881	1,765	190	43,299	40,745	2,554	5,369	5,052	317
Pennsylvania.....	6,585	6,241	561	159,170	151,148	8,023	19,737	18,742	995
Rhode Island.....	578	547	56	13,691	13,011	680	1,698	1,613	84
South Carolina.....	2,138	2,033	174	45,633	43,604	2,029	5,658	5,407	252
South Dakota.....	442	404	60	8,103	7,359	745	1,005	912	92
Tennessee.....	3,159	2,974	315	68,369	64,326	4,043	8,478	7,976	501
Texas.....	10,112	9,465	1,057	228,697	215,166	13,531	28,358	26,681	1,678
Utah.....	1,158	1,104	97	24,198	23,029	1,169	3,001	2,856	145
Vermont.....	361	335	44	7,591	7,102	489	941	881	61
Virginia.....	3,862	3,678	324	96,738	92,581	4,156	11,995	11,480	515
Washington.....	3,288	3,114	295	82,171	77,652	4,518	10,189	9,629	560
West Virginia.....	850	802	80	17,330	16,418	911	2,149	2,036	113
Wisconsin.....	3,162	3,013	262	74,689	71,375	3,314	9,261	8,851	411
Wyoming.....	283	265	34	5,758	5,405	354	714	670	44
Puerto Rico.....	1,150	1,092	64	15,886	14,919	967	1,970	1,850	120
Virgin Islands.....	46	43	4	984	931	53	122	115	7
Other and unknown <sup>5</sup> .....	282	278	5	5,374	5,321	53	666	660	7

<sup>1</sup> State designation based primarily on employee end-of-year residence, obtained from employer wage reports filed via magnetic media. State designation based on location of employer for reports filed via paper.

<sup>2</sup> Workers with earnings in both wage and salary employment and self-employment are counted in each type of employment. National and state totals and subtotals are unduplicated counts of workers in each type of employment.

<sup>3</sup> Annual maximum taxable earnings for Social Security (OASDI) from a single employer or from self-employment were \$68,400 in 1998.

<sup>4</sup> For 1998 earnings, paid at the rate of 6.2 percent of taxable wages by both employees and employers, 6.2 percent of taxable tips by employees, and 12.4 percent of self-employment income by self-employed workers. Data are unadjusted for multi-employer tax refunds.

<sup>5</sup> Persons employed in American Samoa and Guam, U.S. citizens employed abroad by American employers, persons employed on oceanborne vessels, and workers with unknown residence.

CONTACT: Greg Diez/William Kearns (410) 965-0153/6750 for further information.



Table 4.B11.—Number of workers, taxable earnings, and contributions, by type of employment, 1937–2000

[Based on 1-percent sample]

Year	Number of workers reported with taxable earnings <sup>1</sup> (in thousands)			Reported taxable earnings <sup>2</sup> (in millions)			OASDI contributions <sup>3, 4</sup> (in millions)		
	Total, all workers	Wage and salary workers	Self-employed persons	Total	Wages	Self-employment income	Total	Wage and salary employment	Self-employment
1937.....	32,900	32,900	...	\$29,620	\$29,620	...	\$592	\$592	...
1940.....	35,390	35,390	...	32,970	32,970	...	659	659	...
1945.....	46,390	46,390	...	62,950	62,950	...	1,259	1,259	...
1950.....	48,280	48,280	...	87,500	87,500	...	2,625	2,625	...
1951.....	58,120	54,630	4,190	120,770	111,250	\$9,520	3,552	3,338	\$214
1952.....	59,580	56,060	4,240	128,640	118,880	9,760	3,786	3,566	220
1953.....	60,840	57,220	4,340	135,870	125,840	10,030	4,001	3,775	226
1954.....	59,610	55,940	4,350	133,520	123,410	10,110	5,240	4,936	303
1955.....	65,200	59,560	6,810	157,540	141,810	15,730	6,144	5,672	472
1956.....	67,610	61,560	7,390	170,720	153,010	17,710	6,652	6,120	531
1957.....	70,590	64,730	7,150	181,380	163,990	17,390	7,966	7,380	587
1958.....	69,770	64,040	7,130	180,720	163,140	17,580	7,935	7,341	593
1959.....	71,700	66,000	7,060	202,310	183,620	18,690	9,882	9,181	701
1960.....	72,530	66,980	6,870	207,000	188,580	18,420	12,144	11,315	829
1961.....	72,820	67,360	6,790	209,640	190,850	18,790	12,297	11,451	846
1962.....	74,280	68,890	6,720	219,050	200,130	18,920	13,397	12,508	889
1963.....	75,540	70,310	6,590	225,550	206,840	18,710	16,006	14,996	1,010
1964.....	77,430	72,230	6,480	236,390	217,430	18,960	16,788	15,764	1,024
1965.....	80,680	75,430	6,550	250,730	230,830	19,900	17,810	16,735	1,075
1966.....	84,600	79,460	6,630	312,540	287,860	24,680	23,597	22,165	1,431
1967.....	87,040	82,020	6,470	329,960	305,670	24,290	25,275	23,842	1,433
1968.....	89,380	84,470	6,570	375,800	348,500	27,300	28,069	26,486	1,583
1969.....	92,060	87,200	6,350	402,510	375,010	27,500	33,233	31,501	1,733
1970.....	93,090	88,180	6,270	415,580	388,680	26,900	34,344	32,649	1,695
1971.....	93,340	88,460	6,290	426,950	399,550	27,400	38,649	36,759	1,891
1972.....	96,240	91,220	6,600	484,150	452,050	32,100	43,804	41,589	2,215
1973.....	99,830	94,610	7,100	561,850	523,450	38,400	53,463	50,775	2,688
1974.....	101,330	96,190	7,040	636,800	594,400	42,400	61,814	58,846	2,968
1975.....	100,200	94,900	7,000	664,700	621,100	43,600	64,541	61,489	3,052
1976.....	102,600	97,230	7,400	737,700	689,200	48,500	71,626	68,231	3,395
1977.....	105,800	100,450	7,480	816,600	763,600	53,000	79,306	75,596	3,710
1978.....	110,600	104,810	8,040	915,600	856,100	59,500	90,691	86,466	4,225
1979.....	112,700	106,900	8,200	1,067,000	997,500	69,500	106,246	101,346	4,900
1980.....	113,000	107,200	8,200	1,180,700	1,109,000	71,700	117,729	112,674	5,055
1981.....	113,000	107,300	8,250	1,294,100	1,220,000	74,100	136,468	130,540	5,928
1982.....	111,800	105,800	8,550	1,365,300	1,290,000	75,300	145,382	139,320	6,062
1983.....	112,100	105,900	9,200	1,454,100	1,369,000	85,100	154,703	147,852	6,851
1984.....	116,300	109,900	9,900	1,608,800	1,515,000	93,800	183,403	172,710	10,693
1985.....	119,800	113,400	10,600	1,722,600	1,621,000	101,600	196,376	184,794	11,582
1986.....	122,900	115,900	11,200	1,844,400	1,730,800	113,600	210,262	197,311	12,950
1987.....	125,600	118,200	12,000	1,960,000	1,835,100	124,900	223,440	209,201	14,239
1988.....	129,600	122,100	12,400	2,088,400	1,952,000	136,400	253,114	236,582	16,532
1989.....	131,700	123,900	12,900	2,239,500	2,096,000	143,500	271,427	254,035	17,392
1990.....	133,600	126,100	12,500	2,358,000	2,222,000	136,000	292,392	275,528	16,864
1991.....	133,000	125,200	12,800	2,422,500	2,283,000	139,500	300,390	283,092	17,298
1992.....	134,000	126,000	13,100	2,532,900	2,386,000	146,900	314,080	295,864	18,216
1993.....	136,100	128,100	13,200	2,636,100	2,483,400	152,700	326,876	307,942	18,935
1994.....	138,200	130,100	13,300	2,785,200	2,624,500	160,700	345,365	325,438	19,927
1995.....	141,000	132,800	13,500	2,919,100	2,754,300	164,800	361,968	341,533	20,435
1996 <sup>5</sup> .....	143,500	135,100	13,900	3,073,700	2,902,000	171,700	381,139	359,848	21,291
1997 <sup>5</sup> .....	146,300	137,700	14,200	3,285,500	3,105,400	180,100	407,402	385,070	22,332
1998 <sup>5</sup> .....	149,100	140,400	14,400	3,515,600	3,325,800	189,800	435,934	412,399	23,535
1999 <sup>6</sup> .....	151,200	142,400	14,600	3,736,400	3,536,000	200,400	463,314	438,464	24,850
2000 <sup>7</sup> .....	152,900	144,200	14,600	3,982,700	3,770,400	212,300	493,855	467,530	26,325

<sup>1</sup> Workers with earnings in both wage and salary employment and self-employment are counted in each type of employment.<sup>2</sup> See table 2.A3 for annual maximum taxable earnings.<sup>3</sup> See table 2.A3 for contribution rates.<sup>4</sup> Unadjusted for multi-employer tax refunds. Unadjusted for tax credits. See table 2.A5 for information on tax credits.<sup>5</sup> Preliminary data.<sup>6</sup> Taxable earnings are preliminary estimates based on Social Security data; employment data are preliminary estimates based on data from Bureau of Labor Statistics and the National Income and Product Accounts.<sup>7</sup> Preliminary estimates based on data from Bureau of Labor Statistics and the National Income and Product Accounts.

## 4.B HI: Covered Workers

Table 4.B12.—Number of workers, taxable earnings, and contributions, by type of employment and state, 1998

[Preliminary estimates. Based on 1-percent sample]

State <sup>1</sup>	Number of workers reported with taxable earnings <sup>2</sup> (in thousands)			Reported taxable earnings <sup>3</sup> (in millions)			Medicare (Hospital Insurance) contributions <sup>4</sup> (in millions)		
	Total, all workers	Wage and salary workers	Self-employed persons	Total	Wages	Self-employment income	Total	Wage and salary employment	Self-employment
Total .....	152,400	143,800	15,100	\$4,307,300	\$4,017,700	\$289,600	\$124,912	\$116,513	\$8,398
Alabama.....	2,319	2,196	211	53,814	50,800	3,014	1,561	1,473	87
Alaska.....	356	335	41	9,764	9,066	698	283	263	20
Arizona.....	2,532	2,402	226	65,592	61,762	3,830	1,902	1,791	111
Arkansas.....	1,382	1,299	145	28,855	26,902	1,953	837	780	57
California.....	16,565	15,331	1,990	531,060	483,101	47,959	15,401	14,010	1,391
Colorado.....	2,441	2,294	267	70,373	65,375	4,997	2,041	1,896	145
Connecticut.....	1,958	1,842	208	81,320	74,702	6,618	2,358	2,166	192
Delaware.....	477	462	32	13,727	13,205	522	398	383	15
District of Columbia.....	360	344	29	13,905	12,441	1,465	403	361	42
Florida.....	8,097	7,617	837	205,000	193,125	11,875	5,945	5,601	344
Georgia.....	4,411	4,186	402	123,369	115,977	7,393	3,578	3,363	214
Hawaii.....	640	601	64	16,944	15,983	962	491	463	28
Idaho.....	696	653	76	14,958	13,938	1,020	434	404	30
Illinois.....	6,899	6,555	629	210,589	197,195	13,394	6,107	5,719	388
Indiana.....	3,467	3,309	307	89,607	84,357	5,251	2,599	2,446	152
Iowa.....	1,719	1,606	205	39,757	37,024	2,733	1,153	1,074	79
Kansas.....	1,523	1,431	171	39,484	36,544	2,941	1,145	1,060	85
Kentucky.....	2,085	1,956	232	47,203	44,410	2,794	1,369	1,288	81
Louisiana.....	2,251	2,128	208	51,860	48,341	3,519	1,504	1,402	102
Maine.....	708	656	92	15,521	14,286	1,235	450	414	36
Maryland.....	2,981	2,845	259	94,769	89,607	5,161	2,748	2,599	150
Massachusetts.....	3,567	3,350	389	120,978	110,713	10,265	3,508	3,211	298
Michigan.....	5,664	5,427	449	167,547	160,220	7,326	4,859	4,646	212
Minnesota.....	2,975	2,811	316	85,601	80,441	5,160	2,482	2,333	150
Mississippi.....	1,423	1,344	131	29,159	27,078	2,081	846	785	60
Missouri.....	3,106	2,936	304	76,121	71,233	4,889	2,208	2,066	142
Montana.....	491	446	73	9,673	8,599	1,074	281	249	31
Nebraska.....	1,010	946	120	23,012	21,348	1,665	667	619	48
Nevada.....	1,035	993	76	26,679	25,239	1,440	774	732	42
New Hampshire.....	746	700	84	22,150	20,671	1,479	642	599	43
New Jersey.....	4,675	4,444	415	178,860	168,177	10,683	5,187	4,877	310
New Mexico.....	897	844	91	19,374	18,198	1,176	562	528	34
New York.....	9,846	9,289	981	334,740	308,306	26,433	9,707	8,941	767
North Carolina.....	4,478	4,234	436	112,942	106,138	6,803	3,275	3,078	197
North Dakota.....	376	348	52	7,819	7,148	671	227	207	19
Ohio.....	6,352	6,036	575	166,701	157,179	9,522	4,834	4,558	276
Oklahoma.....	1,809	1,688	205	39,078	36,658	2,419	1,133	1,063	70
Oregon.....	1,898	1,782	196	49,575	46,260	3,315	1,438	1,342	96
Pennsylvania.....	6,649	6,304	590	187,524	175,979	11,546	5,438	5,103	335
Rhode Island.....	585	554	59	16,336	15,477	859	474	449	25
South Carolina.....	2,152	2,047	179	50,379	47,665	2,713	1,461	1,382	79
South Dakota.....	447	409	61	8,855	8,021	834	257	233	24
Tennessee.....	3,183	2,999	326	78,639	72,686	5,954	2,281	2,108	173
Texas.....	10,540	9,908	1,102	290,358	270,791	19,566	8,420	7,853	567
Utah.....	1,172	1,118	101	27,044	25,590	1,454	784	742	42
Vermont.....	363	337	44	8,491	7,841	650	246	227	19
Virginia.....	3,914	3,730	343	115,970	109,645	6,325	3,363	3,180	183
Washington.....	3,327	3,153	309	101,085	94,926	6,159	2,931	2,753	179
West Virginia.....	860	813	82	19,102	17,722	1,380	554	514	40
Wisconsin.....	3,180	3,030	274	84,492	80,027	4,465	2,450	2,321	129
Wyoming.....	286	268	35	6,375	5,862	513	185	170	15
Puerto Rico.....	1,183	1,126	64	17,514	16,270	1,244	508	472	36
Virgin Islands.....	46	43	4	1,131	982	150	33	28	4
Other and unknown <sup>5</sup> .....	297	294	5	6,525	6,471	54	189	188	2

<sup>1</sup> State designation based primarily on employee end-of-year residence, obtained from employer wage reports filed via magnetic media. State designation based on location of employer for reports filed via paper.

<sup>2</sup> Workers with earnings in both wage and salary employment and self-employment are counted in each type of employment. National and state totals and subtotals are unduplicated counts of workers in each type of employment.

<sup>3</sup> No annual maximum taxable earnings amount for Medicare.

<sup>4</sup> For 1998 earnings, paid at the rate of 1.45 percent of taxable wages by both employees and employers, 1.45 percent of taxable tips by employees, and 2.9 percent of self-employment income by self-employed workers.

<sup>5</sup> Persons employed in American Samoa and Guam, U.S. citizens employed abroad by American employers, persons employed on oceanborne vessels, and workers with unknown residence.

CONTACT: Greg Diez/William Kearns (410) 965-0153/6750 for further information.

Table 4.C1.—Estimated number,<sup>1</sup> by insured status, December 31, 1940–2001

[In millions]

Year	Workers fully insured for retirement and/or survivor benefits			Workers insured in event of disability
	Total	Permanently insured	Not permanently insured	
1940	24.2	1.1	23.1	...
1941	25.8	1.4	24.4	...
1942	28.1	1.8	26.3	...
1943	29.9	2.3	27.6	...
1944	31.9	2.8	29.1	...
1945	33.4	3.4	30.0	...
1946	35.4	8.6	26.8	...
1947	37.3	11.6	25.7	...
1948	38.9	13.2	25.7	...
1949	40.1	14.9	25.2	...
1950	59.8	21.0	38.8	...
1951	62.8	22.9	39.9	...
1952	68.2	25.6	42.7	...
1953	71.0	27.7	43.4	...
1954	70.2	29.9	40.4	31.9
1955	70.5	32.5	38.0	35.4
1956	74.0	36.1	38.0	37.2
1957	76.1	38.3	37.9	38.4
1958	76.5	40.3	36.2	43.4
1959	76.7	42.2	34.6	46.4
1960	84.4	47.6	36.8	48.5
1961	88.5	53.3	35.3	50.5
1962	89.8	54.9	34.8	51.5
1963	91.3	56.6	34.7	52.3
1964	92.8	58.3	34.5	53.3
1965	94.8	60.2	34.6	55.0
1966	97.2	61.9	35.3	55.7
1967	99.9	63.3	36.6	56.9
1968	102.6	64.5	38.1	70.1
1969	105.1	65.7	39.4	72.4
1970	107.9	66.9	41.0	74.5
1971	111.1	68.7	42.3	76.1
1972	113.8	70.1	43.7	77.8
1973	116.8	71.3	45.6	80.4
1974	120.2	72.7	47.5	83.3
1975	123.2	74.4	48.8	85.3
1976	126.0	76.1	49.9	87.0
1977	129.0	78.1	50.9	89.3
1978	133.3	80.3	53.0	93.7
1979	137.3	83.0	54.3	98.0
1980	140.4	85.3	55.0	100.3
1981	142.9	88.0	54.9	102.6
1982	144.7	90.7	54.0	104.5
1983	146.5	94.0	52.5	105.4
1984	148.3	96.9	51.4	107.1
1985	150.9	100.1	50.8	109.6
1986	153.2	103.3	49.9	111.6
1987	155.7	107.4	48.3	113.5
1988	158.3	110.7	47.6	115.7
1989	161.3	113.6	47.8	118.1
1990	164.0	116.4	47.6	120.1
1991	165.9	118.8	47.2	121.5
1992	167.5	121.1	46.4	122.9
1993	169.2	123.6	45.6	124.4
1994	170.8	125.9	44.9	126.2
1995	173.2	128.4	44.8	128.2
1996	175.3	130.9	44.4	130.3
1997	177.7	133.8	44.0	132.2
1998	180.0	136.2	43.8	134.2
1999	182.4	138.6	43.8	136.4
2000	184.8	140.8	44.0	138.7
2001	187.3	143.0	44.2	141.0

<sup>1</sup> Figures are subject to revision.

CONTACT: Jeff Kunkel (410) 965-3013 for further information.





#### 4.C OASDI: Insured Workers

Table 4.C5.—Population in the Social Security area:<sup>1</sup> Estimated number and percentage fully insured, by age and sex, 1997–2001

[Numbers in thousands]

Age attained at end of year	1997		1998		1999		2000		2001	
	Population	Percent fully insured	Population	Percent fully insured	Population	Percent fully insured	Population	Percent fully insured	Population	Percent fully insured
Total.....	279,703	<sup>2</sup> 87	282,024	<sup>2</sup> 87	284,388	<sup>2</sup> 88	286,765	<sup>2</sup> 88	289,114	<sup>2</sup> 88
Under 15.....	61,331	(3)	61,579	(3)	61,810	(3)	61,966	(3)	62,096	(3)
15–19.....	19,580	22	19,830	23	19,957	24	20,077	24	20,183	24
20–24.....	18,096	81	18,363	81	18,777	82	19,247	82	19,681	83
25–29.....	19,964	92	19,658	92	19,248	92	18,806	92	18,552	92
30–34.....	21,517	92	21,014	92	20,681	92	20,604	93	20,565	93
35–39.....	23,508	92	23,451	92	23,263	92	22,869	92	22,326	92
40–44.....	22,195	91	22,625	91	22,991	91	23,296	92	23,475	92
45–49.....	19,378	91	19,821	91	20,359	92	20,928	92	21,506	92
50–54.....	16,013	89	16,668	90	17,470	90	18,361	91	18,865	91
55–59.....	12,548	85	13,095	86	13,562	87	13,938	87	14,694	88
60–64.....	10,491	84	10,712	83	10,917	84	11,138	84	11,475	85
65–69.....	9,846	81	9,688	82	9,602	82	9,575	82	9,595	83
70–74.....	8,950	80	8,958	80	8,936	79	8,922	80	8,864	80
75 or older.....	16,288	74	16,563	75	16,815	75	17,038	76	17,236	76
Male.....	137,921	<sup>2</sup> 93	139,108	<sup>2</sup> 93	140,316	<sup>2</sup> 93	141,530	<sup>2</sup> 93	142,729	<sup>2</sup> 93
Under 15.....	31,368	(3)	31,490	(3)	31,607	(3)	31,687	(3)	31,754	(3)
15–19.....	10,028	22	10,157	23	10,219	24	10,277	24	10,327	24
20–24.....	9,212	82	9,358	82	9,584	82	9,835	82	10,064	83
25–29.....	10,093	94	9,928	94	9,723	94	9,510	93	9,396	93
30–34.....	10,888	95	10,622	95	10,442	95	10,389	95	10,358	95
35–39.....	11,884	95	11,855	95	11,756	95	11,549	95	11,266	95
40–44.....	11,141	95	11,366	95	11,559	95	11,720	95	11,816	95
45–49.....	9,645	95	9,867	95	10,141	95	10,431	95	10,728	95
50–54.....	7,916	95	8,241	95	8,640	95	9,083	95	9,331	95
55–59.....	6,137	94	6,407	94	6,636	95	6,820	95	7,195	95
60–64.....	5,042	94	5,153	93	5,254	93	5,364	93	5,530	93
65–69.....	4,599	92	4,534	92	4,497	93	4,488	92	4,505	92
70–74.....	3,970	92	3,992	92	4,001	91	4,012	91	3,998	91
75 or older.....	5,998	90	6,138	90	6,258	90	6,364	91	6,460	91
Female.....	141,781	<sup>2</sup> 82	142,917	<sup>2</sup> 82	144,072	<sup>2</sup> 83	145,236	<sup>2</sup> 83	146,385	<sup>2</sup> 84
Under 15.....	29,963	(3)	30,089	(3)	30,202	(3)	30,279	(3)	30,342	(3)
15–19.....	9,551	22	9,673	23	9,738	23	9,800	24	9,856	24
20–24.....	8,884	80	9,005	81	9,193	81	9,412	82	9,617	83
25–29.....	9,871	90	9,730	90	9,525	91	9,296	91	9,156	91
30–34.....	10,629	89	10,393	89	10,239	90	10,215	90	10,207	91
35–39.....	11,624	88	11,597	89	11,508	89	11,319	89	11,061	89
40–44.....	11,054	88	11,259	88	11,431	88	11,575	88	11,659	89
45–49.....	9,733	87	9,954	87	10,218	88	10,497	88	10,777	88
50–54.....	8,096	83	8,427	84	8,830	85	9,278	86	9,534	86
55–59.....	6,411	77	6,688	79	6,926	79	7,118	80	7,498	81
60–64.....	5,449	74	5,559	74	5,663	75	5,774	76	5,945	77
65–69.....	5,247	72	5,154	73	5,105	73	5,086	74	5,091	75
70–74.....	4,980	70	4,966	70	4,936	70	4,910	70	4,866	70
75 or older.....	10,290	65	10,425	66	10,558	67	10,674	67	10,775	68

<sup>1</sup> The population referred to as “population in the Social Security area” includes residents of the 50 states and the District of Columbia adjusted for net census undercount; civilian residents of Puerto Rico, the Virgin Islands, Guam, American Samoa and the Northern Mariana Islands; federal civilian employees and persons in the Armed Forces abroad and their dependents; crew members of merchant vessels; and all other U.S. citizens abroad. Population estimates are subject to revision.

<sup>2</sup> Percent of population fully insured aged 20 or older.

<sup>3</sup> Less than 0.5 percent.

CONTACT: Felicitie Bell (410) 965-3020 for further information.



5.A OASDI Current-Pay Benefits: Summary

Table 5.A1.—Number and average monthly benefit, by type of benefit, race,<sup>1</sup> age, and sex, December 2000

[Based on 10-percent sample]

Age and sex	Total <sup>2</sup>		White		Black		Other <sup>3</sup>	
	Number <sup>4</sup>	Average monthly benefit	Number	Average monthly benefit	Number	Average monthly benefit	Number	Average monthly benefit
<b>OASDI<sup>5</sup>.....</b>	45,417,470	\$767.40	38,853,370	\$791.50	4,622,040	\$635.70	1,768,950	\$589.50
<b>OASI.....</b>	38,742,190	787.80	34,046,540	807.60	3,423,580	652.40	1,151,500	611.10
<b>DI.....</b>	6,675,280	649.10	4,806,830	677.50	1,198,460	587.90	617,450	549.30
<b>Retired workers</b>								
<b>Total.....</b>	28,505,990	\$844.60	25,401,010	\$859.90	2,282,550	\$724.20	749,030	\$697.40
62-64.....	2,553,070	766.10	2,245,920	779.20	218,270	695.70	88,700	605.30
62.....	703,160	768.80	620,630	781.20	57,820	704.60	24,680	607.10
63.....	903,650	772.70	792,860	786.70	79,560	697.70	31,200	607.90
64.....	946,260	757.70	832,430	770.70	80,890	687.40	32,820	601.60
65-69.....	7,284,590	836.20	6,357,910	853.60	663,140	730.80	256,640	680.90
65.....	1,531,390	830.30	1,328,440	847.80	143,170	726.30	58,900	690.60
66.....	1,504,200	828.50	1,309,340	846.00	139,380	730.00	54,410	664.20
67.....	1,414,230	835.50	1,230,690	853.30	130,190	729.80	52,050	681.70
68.....	1,433,030	848.80	1,250,750	866.30	133,370	741.40	47,480	692.60
69.....	1,401,740	838.50	1,238,690	855.10	117,030	726.60	43,800	674.80
70-74.....	6,635,980	842.20	5,910,520	857.40	530,770	724.50	176,110	700.90
70.....	1,413,290	835.90	1,252,630	852.20	115,180	724.00	43,200	671.20
71.....	1,334,670	834.60	1,184,530	850.00	109,380	720.80	37,190	695.60
72.....	1,332,720	845.80	1,187,840	860.50	106,000	729.20	34,900	719.10
73.....	1,312,050	851.30	1,171,250	866.80	103,910	725.30	32,720	714.70
74.....	1,243,250	843.90	1,114,270	857.80	96,300	723.10	28,100	714.70
75-79.....	5,472,830	839.70	4,933,570	853.10	400,320	714.90	117,600	718.90
75.....	1,199,840	855.10	1,077,070	869.50	91,040	727.80	27,380	728.10
76.....	1,170,200	840.50	1,053,630	854.10	86,680	715.60	25,410	720.90
77.....	1,088,150	833.90	982,550	846.90	77,680	710.40	24,070	713.20
78.....	1,021,090	833.40	919,150	846.20	75,600	713.70	21,840	718.40
79.....	993,550	833.00	901,170	845.80	69,320	703.70	18,900	711.00
80-84.....	3,623,140	884.00	3,292,210	897.30	251,440	742.10	63,520	764.40
80.....	888,300	832.40	805,650	844.60	61,840	708.00	16,870	714.80
81.....	771,160	847.50	696,560	860.60	57,030	716.90	14,040	726.50
82.....	733,940	887.90	669,000	901.20	49,190	743.40	12,500	752.20
83.....	650,080	914.90	593,240	928.00	42,740	760.20	11,140	812.90
84.....	579,660	972.10	527,760	986.40	40,640	808.50	8,970	874.00
85-89.....	1,984,990	927.70	1,806,220	941.90	138,780	760.70	32,010	829.90
85.....	517,920	957.60	472,570	971.30	34,310	792.40	8,720	862.10
86.....	464,190	941.10	421,690	956.00	33,100	767.60	7,420	842.60
87.....	394,470	923.20	359,220	937.20	27,320	759.30	6,360	813.40
88.....	335,700	901.10	304,210	915.10	24,730	741.90	5,350	807.80
89.....	272,710	887.00	248,530	901.40	19,320	718.30	4,160	793.50
90-94.....	751,790	855.50	679,090	871.30	59,330	690.20	11,360	755.70
95 or older.....	199,600	787.50	175,570	807.70	20,500	623.80	3,090	724.20
<b>Men.....</b>	14,771,930	951.50	13,226,180	970.90	1,092,320	795.10	420,740	752.60
62-64.....	1,330,230	913.70	1,167,190	937.40	114,470	773.90	48,430	671.70
62.....	358,360	929.20	315,670	952.10	29,560	792.10	13,110	686.50
63.....	471,970	922.70	413,170	948.10	41,800	774.50	16,980	668.90
64.....	499,900	894.00	438,350	916.80	43,110	760.70	18,340	663.70
65-69.....	4,075,670	964.40	3,579,810	988.70	343,810	808.40	147,690	742.90
65.....	856,350	966.20	747,470	991.50	74,580	809.60	33,740	753.60
66.....	842,380	958.50	737,280	983.50	72,780	808.60	31,690	724.90
67.....	793,440	962.00	694,860	986.90	67,460	805.00	30,270	744.80
68.....	798,950	976.50	701,670	1,001.00	69,240	816.90	27,120	756.10
69.....	784,550	958.80	698,530	980.70	59,750	800.60	24,870	734.70
70-74.....	3,630,930	955.30	3,257,570	974.80	266,370	796.40	98,390	753.70
70.....	786,300	952.50	701,970	973.80	59,460	797.20	23,540	718.80
71.....	734,600	948.10	657,800	967.30	54,570	795.70	20,540	755.20
72.....	728,210	961.90	653,810	980.70	53,090	804.90	19,730	780.20
73.....	711,400	965.40	639,450	985.30	51,470	795.70	18,480	761.30
74.....	670,420	948.70	604,540	966.50	47,780	787.40	16,100	761.70
75-79.....	2,854,830	927.00	2,589,430	942.70	190,430	773.60	65,900	762.80
75.....	635,160	961.50	574,080	979.30	44,220	792.90	14,980	786.40
76.....	613,880	936.70	556,290	953.00	41,480	780.60	14,300	766.00
77.....	569,270	917.90	517,300	933.10	36,660	766.70	13,660	754.60
78.....	530,120	909.10	479,670	924.40	36,010	766.50	12,530	750.20
79.....	506,400	900.90	462,090	914.80	32,060	753.80	10,430	750.60
80-84.....	1,734,140	953.40	1,587,290	967.20	105,190	797.10	35,050	803.90
80.....	447,630	887.60	408,350	900.40	27,710	746.20	9,920	758.80
81.....	376,510	905.30	342,220	919.00	25,040	763.90	7,850	760.70
82.....	347,810	957.90	319,300	971.40	20,370	803.40	6,760	788.00
83.....	301,000	999.20	277,280	1,012.20	16,540	834.10	5,930	854.90
84.....	261,190	1,076.90	240,140	1,091.70	15,530	894.10	4,590	933.00

See footnotes at end of table.



Table 5.A1.—Number and average monthly benefit, by type of benefit, race,<sup>1</sup> age, and sex, December 2000—Continued

[Based on 10-percent sample]

Age and sex	Total <sup>2</sup>		White		Black		Other <sup>3</sup>	
	Number <sup>4</sup>	Average monthly benefit	Number	Average monthly benefit	Number	Average monthly benefit	Number	Average monthly benefit
<b>Retired workers—Continued</b>								
85–89.....	827,920	\$1,025.80	758,620	\$1,039.70	48,740	\$850.00	17,420	\$893.80
85.....	227,510	1,065.20	209,170	1,077.70	12,730	897.90	4,690	950.60
86.....	197,700	1,038.70	180,600	1,053.50	12,200	858.90	4,070	910.90
87.....	162,970	1,022.00	149,950	1,035.70	9,240	844.90	3,250	861.90
88.....	134,490	992.10	122,870	1,005.70	8,040	815.40	2,980	870.90
89.....	105,250	965.40	96,030	980.50	6,530	789.80	2,430	826.50
90–94.....	262,460	927.10	237,350	942.80	18,020	754.10	6,410	796.80
95 or older.....	55,750	867.20	48,920	888.20	5,290	697.70	1,450	782.80
<b>Women.....</b>	<b>13,734,060</b>	<b>729.60</b>	<b>12,174,830</b>	<b>739.30</b>	<b>1,190,230</b>	<b>659.20</b>	<b>328,290</b>	<b>626.50</b>
62–64.....	1,222,840	605.50	1,078,730	608.10	103,800	609.60	40,270	525.50
62.....	344,800	602.00	304,960	604.20	28,260	613.20	11,570	517.20
63.....	431,680	608.80	379,690	611.10	37,760	612.70	14,220	535.10
64.....	446,360	605.00	394,080	608.10	37,780	603.70	14,480	522.90
65–69.....	3,208,920	673.30	2,778,100	679.40	319,330	647.30	108,950	596.80
65.....	675,040	658.00	580,970	662.90	68,590	635.60	25,160	566.00
66.....	661,820	663.20	572,060	668.80	66,600	644.10	22,720	579.60
67.....	620,790	673.80	535,830	680.10	62,730	649.00	21,780	594.00
68.....	634,080	687.90	549,080	694.20	64,130	659.80	20,360	608.00
69.....	617,190	685.60	540,160	692.80	57,280	649.30	18,930	596.30
70–74.....	3,005,050	705.50	2,652,950	713.20	264,400	652.00	77,720	634.00
70.....	626,990	689.80	550,660	697.20	55,720	645.70	19,660	614.20
71.....	600,070	695.70	526,730	703.60	54,810	646.20	16,650	622.00
72.....	604,510	705.90	534,030	713.40	52,910	653.30	15,170	639.70
73.....	600,650	716.20	531,800	724.20	52,440	656.10	14,240	654.20
74.....	572,830	721.20	509,730	728.90	48,520	659.80	12,000	651.70
75–79.....	2,618,000	744.60	2,344,140	754.00	209,890	661.70	51,700	663.00
75.....	564,680	735.60	502,990	744.20	46,820	666.30	12,400	657.70
76.....	556,320	734.50	497,340	743.50	45,200	656.00	11,110	662.90
77.....	518,880	741.80	465,250	751.10	41,020	660.10	10,410	658.90
78.....	490,970	751.50	439,480	760.90	39,590	665.70	9,310	675.60
79.....	487,150	762.40	439,080	773.20	37,260	660.50	8,470	662.10
80–84.....	1,889,000	820.30	1,704,920	832.20	146,250	702.50	28,470	715.80
80.....	440,670	776.30	397,300	787.10	34,130	677.00	6,950	652.00
81.....	394,650	792.30	354,340	804.30	31,990	680.10	6,190	683.20
82.....	386,130	824.90	349,700	837.10	28,820	701.10	5,740	710.10
83.....	349,080	842.20	315,960	854.20	26,200	713.50	5,210	765.10
84.....	318,470	886.20	287,620	898.50	25,110	755.60	4,380	812.10
85–89.....	1,157,070	857.40	1,047,600	871.10	90,040	712.30	14,590	753.60
85.....	290,410	873.40	263,400	886.90	21,580	730.20	4,030	759.10
86.....	266,490	868.60	241,090	883.00	20,900	714.30	3,350	759.60
87.....	231,500	853.60	209,270	866.70	18,080	715.60	3,110	762.70
88.....	201,210	840.20	181,340	853.70	16,690	706.50	2,370	728.40
89.....	167,460	837.80	152,500	851.60	12,790	681.80	1,730	747.00
90–94.....	489,330	817.10	441,740	832.80	41,310	662.40	4,950	702.50
95 or older.....	143,850	756.60	126,650	776.50	15,210	598.00	1,640	672.50
<b>Disabled workers</b>								
<b>Total.....</b>	<b>5,035,840</b>	<b>\$787.00</b>	<b>3,701,770</b>	<b>\$809.30</b>	<b>868,070</b>	<b>\$731.40</b>	<b>426,970</b>	<b>\$709.90</b>
Under 20.....	1,470	334.40	1,100	327.20	220	325.40	150	400.50
20–24.....	34,260	429.70	24,030	431.90	6,260	421.50	3,960	428.20
20.....	2,920	360.70	1,990	370.40	650	326.50	280	371.40
21.....	4,830	383.70	3,450	387.00	870	345.80	510	426.40
22.....	6,440	419.70	4,490	417.90	1,230	418.40	720	433.50
23.....	9,000	448.00	6,330	450.10	1,600	447.80	1,070	436.00
24.....	11,070	458.70	7,770	460.90	1,910	468.40	1,380	431.60
25–29.....	100,940	522.40	67,980	534.00	18,920	502.10	13,440	492.20
25.....	13,990	488.80	9,700	494.90	2,410	475.30	1,870	473.20
26.....	16,400	501.40	10,770	513.50	3,520	487.30	2,070	462.50
27.....	18,580	510.00	12,300	523.00	3,600	491.30	2,600	475.20
28.....	23,600	534.70	15,880	547.80	4,450	505.70	3,010	508.60
29.....	28,370	548.90	19,330	560.70	4,940	530.40	3,890	515.90
30–34.....	209,070	596.90	142,290	605.80	37,790	574.70	26,260	583.40
30.....	33,570	562.10	22,910	568.00	5,790	548.00	4,450	553.40
31.....	37,050	578.90	25,370	586.70	6,540	559.40	4,750	563.90
32.....	41,760	594.40	28,420	599.20	7,880	588.10	4,960	578.00
33.....	45,030	610.60	30,300	620.20	8,340	573.00	5,700	617.50
34.....	51,660	622.30	35,290	637.00	9,240	592.20	6,400	592.70
35–39.....	380,480	657.80	267,610	673.10	68,570	610.70	40,080	638.80
35.....	61,540	632.10	42,620	643.80	10,960	598.90	7,140	610.70
36.....	69,500	649.60	48,840	666.80	12,630	599.70	7,350	622.60
37.....	75,140	654.40	52,450	669.20	13,480	611.10	8,440	634.70
38.....	83,380	661.50	58,790	677.00	15,020	608.40	8,710	650.90
39.....	90,920	680.90	64,910	696.70	16,480	628.60	8,440	668.10

See footnotes at end of table.

5.A OASDI Current-Pay Benefits: Summary

Table 5.A1.—Number and average monthly benefit, by type of benefit, race,<sup>1</sup> age, and sex, December 2000—Continued

[Based on 10-percent sample]

Age and sex	Total <sup>2</sup>		White		Black		Other <sup>3</sup>	
	Number <sup>4</sup>	Average monthly benefit	Number	Average monthly benefit	Number	Average monthly benefit	Number	Average monthly benefit
<b>Disabled workers—Continued</b>								
40-44.....	573,730	\$722.20	405,120	\$739.60	108,120	\$670.20	54,670	\$696.30
40.....	99,830	696.10	70,930	714.10	18,090	638.50	9,600	677.30
41.....	109,070	708.20	76,840	724.60	20,600	655.10	10,600	691.90
42.....	112,820	717.50	79,890	731.20	21,290	671.80	10,560	708.60
43.....	122,770	731.80	86,870	748.80	23,090	684.30	11,490	696.80
44.....	129,240	749.00	90,590	770.90	25,050	691.40	12,420	704.00
45-49.....	711,240	776.60	506,070	794.60	132,050	731.00	64,950	728.10
45.....	132,750	755.20	94,000	774.60	25,500	707.70	11,820	709.70
46.....	137,210	767.40	97,590	787.40	25,180	714.90	12,820	718.20
47.....	140,380	779.10	99,260	796.70	26,430	733.90	13,120	733.90
48.....	147,940	782.00	106,430	798.90	26,470	738.20	13,460	730.70
49.....	152,960	796.00	108,790	812.20	28,470	756.60	13,730	745.30
50-54.....	884,370	823.60	638,650	840.10	156,040	784.90	79,040	764.30
50.....	155,280	803.40	109,240	821.00	29,780	766.10	14,200	742.30
51.....	169,090	812.80	119,900	827.70	31,510	780.50	15,320	755.10
52.....	178,300	825.50	127,820	839.50	31,360	791.40	16,460	778.70
53.....	193,890	834.50	142,780	849.60	32,440	794.00	16,550	779.50
54.....	187,810	837.20	138,910	856.50	30,950	791.20	16,510	762.30
55-59.....	1,021,360	847.90	774,820	869.00	167,310	794.70	75,340	751.60
55.....	178,900	835.40	131,600	854.90	31,480	794.80	14,830	751.80
56.....	194,020	848.40	147,180	867.50	32,010	800.80	14,030	760.80
57.....	215,030	848.30	164,130	869.40	35,080	794.60	15,150	745.20
58.....	218,800	852.70	167,890	875.50	34,500	792.50	15,580	742.90
59.....	214,610	852.30	164,020	874.50	34,240	791.10	15,750	758.00
60-64.....	1,118,920	857.30	874,100	882.10	172,790	779.30	69,080	744.20
60.....	218,370	854.90	169,300	879.10	34,300	782.00	14,340	746.40
61.....	224,110	857.70	173,290	881.30	35,830	788.70	14,300	750.70
62.....	232,320	862.00	182,520	885.20	35,350	793.20	13,870	738.20
63.....	223,100	860.30	175,140	887.90	34,100	769.00	13,180	735.60
64.....	221,020	851.20	173,850	876.50	33,210	761.80	13,390	749.30
Men.....	2,856,870	883.00	2,127,670	915.30	465,840	790.90	239,030	784.50
Under 20.....	880	352.90	660	354.00	110	337.50	110	361.20
20-24.....	20,080	441.10	14,180	444.30	3,430	434.00	2,460	431.50
20.....	1,670	362.40	1,180	370.70	350	325.90	140	383.90
21.....	2,970	395.40	2,130	396.90	530	356.80	310	450.70
22.....	3,830	420.90	2,720	415.20	610	428.30	500	442.60
23.....	5,250	465.70	3,650	472.30	960	460.00	640	437.10
24.....	6,360	474.90	4,500	480.90	980	492.50	870	421.90
25-29.....	57,880	535.30	38,720	548.10	10,830	508.00	7,960	510.20
25.....	8,370	498.20	5,710	505.30	1,520	477.00	1,140	490.90
26.....	9,370	510.50	6,180	525.10	1,990	483.00	1,160	480.70
27.....	10,370	526.80	6,810	537.70	2,050	503.30	1,440	510.80
28.....	13,730	541.80	9,320	555.90	2,490	508.50	1,800	511.60
29.....	16,040	568.90	10,700	584.10	2,780	545.70	2,420	532.00
30-34.....	120,150	608.70	80,660	620.30	21,740	579.10	15,890	595.00
30.....	18,970	575.60	12,730	585.70	3,260	553.60	2,680	560.60
31.....	21,530	589.60	14,680	595.80	3,700	570.10	2,920	584.60
32.....	23,880	603.70	15,820	610.00	4,590	593.60	3,090	587.30
33.....	26,110	623.20	17,460	637.10	4,900	574.10	3,280	627.90
34.....	29,660	635.00	19,970	653.90	5,290	593.10	3,920	604.70
35-39.....	217,860	676.20	151,900	694.80	39,760	619.40	23,580	656.00
35.....	35,090	644.90	23,750	659.10	6,450	601.80	4,400	625.50
36.....	39,920	665.30	27,820	687.60	7,320	609.30	4,420	619.10
37.....	43,050	671.30	29,460	687.90	8,170	620.80	4,930	659.20
38.....	47,760	681.90	33,860	699.70	8,410	614.40	4,950	679.60
39.....	52,040	704.70	37,010	724.10	9,410	642.50	4,880	689.70
40-44.....	327,410	762.40	230,240	787.50	61,540	689.00	31,990	728.10
40.....	56,810	725.60	40,360	750.30	10,190	653.00	5,530	690.80
41.....	62,880	742.10	43,830	767.70	11,960	668.20	6,480	708.50
42.....	63,920	757.20	45,330	774.50	11,780	696.80	6,110	750.20
43.....	69,820	777.20	49,320	802.50	13,030	701.60	6,610	741.00
44.....	73,980	798.60	51,400	830.60	14,580	713.70	7,260	743.70
45-49.....	396,030	845.40	284,370	870.90	71,110	768.70	35,800	797.30
45.....	74,370	812.80	52,890	838.70	14,270	740.40	6,420	771.40
46.....	76,510	826.90	54,780	854.50	13,660	746.10	6,980	776.80
47.....	77,800	846.90	55,640	872.20	14,130	769.00	7,170	803.10
48.....	82,390	857.80	60,350	882.40	13,650	778.80	7,550	801.70
49.....	84,960	877.20	60,710	901.10	15,400	805.90	7,680	827.80
50-54.....	494,710	924.70	360,690	949.80	82,770	849.70	44,360	864.00
50.....	87,610	885.30	62,630	908.40	15,910	813.20	7,680	845.50
51.....	94,340	902.70	67,410	926.40	16,940	836.80	8,540	846.50
52.....	99,320	928.40	71,740	951.50	16,280	862.20	9,520	873.50
53.....	108,670	942.90	80,540	966.80	17,370	868.90	9,400	879.40
54.....	104,770	954.90	78,370	983.70	16,270	865.80	9,220	870.10

See footnotes at end of table.

5.A OASDI Current-Pay Benefits: Summary

Table 5.A1.—Number and average monthly benefit, by type of benefit, race,<sup>1</sup> age, and sex, December 2000—Continued  
[Based on 10-percent sample]

Age and sex	Total <sup>2</sup>		White		Black		Other <sup>3</sup>	
	Number <sup>4</sup>	Average monthly benefit	Number	Average monthly benefit	Number	Average monthly benefit	Number	Average monthly benefit
<b>Disabled workers—Continued</b>								
55–59.....	571,040	\$989.70	443,110	\$1,018.50	85,970	\$895.20	39,450	\$878.50
55.....	99,410	964.30	74,060	995.00	16,650	878.10	8,060	866.50
56.....	108,100	984.80	84,010	1,011.10	16,210	899.10	7,380	883.90
57.....	118,800	993.30	93,140	1,021.10	17,810	896.70	7,370	880.60
58.....	122,770	1,001.30	96,370	1,031.80	17,820	898.20	8,020	869.70
59.....	121,960	999.60	95,530	1,027.30	17,480	903.30	8,620	891.40
60–64.....	650,830	1,006.50	523,140	1,034.50	88,580	901.10	37,430	871.30
60.....	124,400	1,005.90	99,030	1,034.60	17,450	900.30	7,700	880.20
61.....	129,560	1,008.40	103,000	1,035.80	18,620	906.50	7,540	892.50
62.....	134,130	1,013.00	108,230	1,041.00	18,000	916.10	7,570	849.70
63.....	131,540	1,008.70	106,390	1,039.10	17,530	891.60	7,190	855.60
64.....	131,200	996.50	106,490	1,022.10	16,980	890.00	7,430	877.90
<b>Women.....</b>	<b>2,178,970</b>	<b>661.10</b>	<b>1,574,100</b>	<b>666.10</b>	<b>402,230</b>	<b>662.40</b>	<b>187,940</b>	<b>615.00</b>
Under 20.....	590	306.90	440	287.00	110	313.30	40	508.80
20–24.....	14,180	413.50	9,850	414.10	2,830	406.40	1,500	422.70
20.....	1,250	358.40	810	369.90	300	327.20	140	358.90
21.....	1,860	365.20	1,320	371.00	340	328.60	200	388.70
22.....	2,610	418.00	1,770	422.00	620	408.70	220	412.70
23.....	3,750	423.20	2,680	419.90	640	429.50	430	434.30
24.....	4,710	436.90	3,270	433.40	930	442.90	510	448.10
25–29.....	43,060	505.00	29,260	515.40	8,090	494.30	5,480	466.20
25.....	5,620	474.70	3,990	480.00	890	472.40	730	445.50
26.....	7,030	489.30	4,590	498.00	1,530	492.90	910	439.40
27.....	8,210	488.80	5,490	504.80	1,550	475.50	1,160	431.10
28.....	9,870	524.70	6,560	536.40	1,960	502.00	1,210	504.20
29.....	12,330	522.80	8,630	531.70	2,160	510.70	1,470	489.40
30–34.....	88,920	580.90	61,630	586.80	16,050	568.70	10,370	565.70
30.....	14,600	544.50	10,180	545.90	2,530	540.90	1,770	542.40
31.....	15,520	564.20	10,690	574.30	2,840	545.40	1,830	530.70
32.....	17,880	582.10	12,600	585.60	3,290	580.40	1,870	562.70
33.....	18,920	593.30	12,840	597.20	3,440	571.40	2,420	603.40
34.....	22,000	605.10	15,320	615.10	3,950	591.10	2,480	573.80
35–39.....	162,620	633.10	115,710	644.70	28,810	598.60	16,500	614.10
35.....	26,450	615.20	18,870	624.50	4,510	594.60	2,740	586.90
36.....	29,580	628.40	21,020	639.30	5,310	586.40	2,930	627.90
37.....	32,090	631.60	22,990	645.20	5,310	596.10	3,510	600.20
38.....	35,620	634.30	24,930	646.30	6,610	600.90	3,760	613.00
39.....	38,880	649.00	27,900	660.40	7,070	610.20	3,560	638.60
40–44.....	246,320	668.60	174,880	676.60	46,580	645.40	22,680	651.50
40.....	43,020	657.20	30,570	666.40	7,900	619.80	4,070	659.00
41.....	46,190	662.10	33,010	667.30	8,640	636.90	4,120	665.80
42.....	48,900	665.60	34,560	674.50	9,510	640.70	4,450	651.50
43.....	52,950	671.80	37,550	678.20	10,060	661.80	4,880	636.90
44.....	55,260	682.70	39,190	692.70	10,470	660.20	5,160	648.10
45–49.....	315,210	690.20	221,700	696.70	60,940	686.90	29,150	643.20
45.....	58,380	681.90	41,110	692.10	11,230	666.10	5,400	636.30
46.....	60,700	692.20	42,810	701.50	11,520	677.90	5,840	648.10
47.....	62,580	694.80	43,620	700.30	12,300	693.60	5,950	650.40
48.....	65,550	686.70	46,080	689.40	12,820	695.00	5,910	640.10
49.....	68,000	694.70	48,080	699.90	13,070	698.50	6,050	640.60
50–54.....	389,660	695.40	277,960	697.80	73,270	711.70	34,680	636.80
50.....	67,670	697.50	46,610	703.70	13,870	712.20	6,520	620.60
51.....	74,750	699.20	52,490	700.90	14,570	715.00	6,780	640.00
52.....	78,980	696.20	56,080	696.10	15,080	714.90	6,940	648.70
53.....	85,220	696.30	62,240	698.00	15,070	707.70	7,150	648.10
54.....	83,040	688.60	60,540	691.80	14,680	708.60	7,290	625.90
55–59.....	450,320	668.00	331,710	669.20	81,340	688.40	35,890	612.20
55.....	79,490	674.30	57,540	674.60	14,830	701.20	6,770	615.30
56.....	85,920	676.80	63,170	676.60	15,800	700.00	6,650	624.30
57.....	96,230	669.30	70,990	670.30	17,270	689.20	7,780	617.10
58.....	96,030	662.80	71,520	664.90	16,680	679.50	7,560	608.30
59.....	92,650	658.40	68,490	661.40	16,760	674.10	7,130	596.70
60–64.....	468,090	649.70	350,960	654.80	84,210	651.10	31,650	593.80
60.....	93,970	654.90	70,270	660.10	16,850	659.50	6,640	591.20
61.....	94,550	651.20	70,290	654.80	17,210	661.30	6,760	592.60
62.....	98,190	655.80	74,290	658.40	17,350	665.80	6,300	604.30
63.....	91,560	647.00	68,750	653.90	16,570	639.30	5,990	591.70
64.....	89,820	638.90	67,360	646.20	16,230	627.80	5,960	589.10

See footnotes at end of table.

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

Table 5.A1.—Number and average monthly benefit, by type of benefit, race,<sup>1</sup> age, and sex, December 2000—*Continued*

[Based on 10-percent sample]

Age and sex	Total <sup>2</sup>		White		Black		Other <sup>3</sup>	
	Number <sup>4</sup>	Average monthly benefit	Number	Average monthly benefit	Number	Average monthly benefit	Number	Average monthly benefit
<b>Spouses</b>								
<b>Total</b> .....	2,962,020	\$416.90	2,685,660	\$427.70	155,620	\$327.40	110,730	\$283.70
<b>Wives</b> .....	2,925,950	419.20	2,662,350	429.30	150,600	330.30	103,280	289.60
<b>Entitlement based on care of children</b> .....	166,760	220.80	123,770	235.20	23,080	197.90	18,870	156.30
Under 35.....	23,490	128.10	16,470	135.80	3,170	112.90	3,670	107.40
35–39.....	28,620	156.80	20,830	164.40	3,840	142.90	3,770	130.70
40–44.....	33,790	195.40	24,530	206.60	5,090	179.80	3,870	147.30
45–49.....	30,440	237.30	22,630	251.60	4,410	209.30	3,260	175.60
50–54.....	21,470	270.80	16,020	284.50	2,930	256.20	2,350	200.30
55–59.....	15,180	308.40	11,930	324.60	2,000	269.80	1,220	213.10
60–61.....	5,820	347.10	4,650	363.10	780	284.50	370	282.80
62–64.....	7,950	374.20	6,710	382.80	860	362.30	360	237.60
<b>Entitlement based on age</b> .....	2,759,190	431.10	2,538,580	438.80	127,520	354.30	84,410	319.30
62–64.....	336,740	392.60	304,470	401.70	17,480	320.30	14,330	290.50
62.....	89,010	386.70	80,810	394.50	4,480	325.40	3,650	290.70
63.....	117,160	390.50	105,930	399.90	6,230	319.30	4,850	279.90
64.....	130,570	398.50	117,730	408.20	6,770	317.90	5,830	299.30
65–69.....	767,870	429.80	697,500	439.30	39,980	352.60	28,620	312.20
65.....	151,690	422.40	136,310	432.80	8,450	343.20	6,630	313.60
66.....	154,610	427.20	139,720	436.50	8,640	361.90	5,900	307.70
67.....	150,050	431.40	135,850	442.20	7,730	337.30	6,200	314.80
68.....	155,870	433.00	142,600	441.80	7,870	351.50	5,010	317.70
69.....	155,650	435.10	143,020	442.90	7,290	369.90	4,880	307.00
70–74.....	732,410	433.20	674,300	440.70	34,450	361.20	21,090	318.80
70.....	158,590	433.60	145,300	441.80	7,800	363.20	5,060	315.10
71.....	149,050	433.90	137,080	442.10	6,810	354.60	4,690	320.00
72.....	147,520	431.90	135,490	439.40	7,230	361.70	4,200	316.30
73.....	144,420	434.50	133,840	440.70	6,530	368.50	3,480	326.20
74.....	132,830	432.10	122,590	439.30	6,080	357.50	3,660	318.30
75–79.....	540,440	432.60	503,180	438.20	21,830	359.90	13,190	337.60
75.....	126,040	431.60	116,320	437.90	5,830	366.40	3,420	335.30
76.....	117,490	427.90	109,780	433.00	4,600	361.80	2,650	328.90
77.....	107,020	434.60	99,350	440.60	4,410	358.20	2,700	344.70
78.....	99,290	432.40	92,500	438.30	3,860	350.20	2,560	334.90
79.....	90,600	437.70	85,230	442.50	3,130	359.30	1,860	347.70
80–84.....	269,220	459.10	253,340	464.00	9,270	372.00	5,390	367.80
85–89.....	93,320	469.50	87,760	474.30	3,630	386.70	1,540	392.20
90–94.....	17,590	464.60	16,570	470.20	740	370.40	250	373.20
95 or older.....	1,600	433.60	1,460	434.60	140	423.00	...	...
<b>Husbands</b> .....	36,070	232.10	23,310	239.40	5,020	240.40	7,450	203.10
Under 62.....	2,220	132.10	1,560	130.50	340	154.20	320	116.30
62–64.....	1,730	189.60	1,290	184.10	200	202.30	240	208.70
65–69.....	7,660	235.80	4,700	238.50	1,240	263.60	1,710	207.40
70–74.....	9,550	241.80	5,980	250.90	1,290	253.90	2,240	211.00
75–79.....	7,340	230.40	4,630	240.40	950	233.60	1,640	198.00
80–84.....	3,750	242.60	2,200	261.10	620	245.30	890	200.10
85–89.....	2,770	268.40	2,210	275.60	240	243.10	270	236.20
90 or older.....	1,050	275.70	740	298.20	140	192.40	140	228.90
<b>Spouses of retired workers</b>								
<b>Total</b> .....	2,797,170	\$429.70	2,560,800	\$438.40	134,530	\$350.50	92,860	\$308.10
<b>Wives of retired workers</b> .....	2,765,190	431.90	2,540,300	439.90	130,190	353.90	85,990	316.00
<b>Entitlement based on care of children</b> .....	55,610	330.40	43,420	347.20	7,560	298.80	4,460	222.80
Under 35.....	1,930	279.70	1,420	293.10	310	247.90	190	240.60
35–39.....	4,140	269.00	3,060	281.50	730	256.30	340	190.90
40–44.....	7,360	302.30	5,310	322.30	1,290	278.50	740	203.40
45–49.....	9,960	327.80	7,900	344.80	1,260	291.30	790	214.50
50–54.....	10,150	320.70	7,710	337.60	1,340	309.20	1,040	216.70
55–59.....	9,770	344.20	7,750	362.20	1,230	301.70	760	230.90
60–61.....	5,020	364.10	4,110	377.10	610	309.00	290	294.00
62–64.....	7,280	382.30	6,160	390.10	790	373.20	310	248.40

See footnotes at end of table.

5.A OASDI Current-Pay Benefits: Summary

Table 5.A1.—Number and average monthly benefit, by type of benefit, race,<sup>1</sup> age, and sex, December 2000—Continued  
[Based on 10-percent sample]

Age and sex	Total <sup>2</sup>		White		Black		Other <sup>3</sup>	
	Number <sup>4</sup>	Average monthly benefit	Number	Average monthly benefit	Number	Average monthly benefit	Number	Average monthly benefit
<b>Spouses of retired workers—Continued</b>								
<b>Entitlement based on age.....</b>	2,709,580	\$433.90	2,496,880	\$441.50	122,630	\$357.30	81,530	\$321.10
62–64.....	308,140	403.40	279,630	412.70	15,270	328.00	12,810	293.60
62.....	78,060	403.30	71,080	411.70	3,780	335.20	3,140	296.80
63.....	106,700	401.40	96,920	410.80	5,320	329.60	4,330	284.20
64.....	123,380	405.20	111,630	415.10	6,170	322.20	5,340	299.20
65–69.....	752,040	433.00	684,680	442.30	38,070	356.30	27,610	313.30
65.....	145,990	428.40	131,670	438.60	7,810	352.00	6,260	313.60
66.....	150,860	430.70	136,670	439.90	8,210	364.80	5,640	309.80
67.....	147,130	434.20	133,530	444.90	7,330	340.20	6,000	316.60
68.....	153,900	435.00	140,950	443.70	7,630	353.50	4,940	318.30
69.....	154,160	436.40	141,860	444.20	7,090	370.80	4,770	308.10
70–74.....	728,330	434.10	671,140	441.40	33,860	361.90	20,780	319.80
70.....	157,360	434.90	144,360	442.90	7,660	364.30	4,920	316.80
71.....	148,070	435.00	136,280	443.10	6,680	354.80	4,640	321.20
72.....	146,770	432.60	134,930	440.00	7,090	363.20	4,150	316.10
73.....	143,790	435.10	133,360	441.30	6,430	368.10	3,440	327.30
74.....	132,340	432.50	122,210	439.60	6,000	358.70	3,630	319.10
75–79.....	539,490	432.80	502,390	438.40	21,700	360.30	13,160	337.90
75.....	125,740	432.10	116,060	438.30	5,820	367.00	3,390	336.60
76.....	117,170	428.20	109,490	433.30	4,570	362.50	2,650	328.90
77.....	106,890	434.80	99,240	440.70	4,390	358.60	2,700	344.70
78.....	99,230	432.50	92,470	438.40	3,830	351.00	2,560	334.90
79.....	90,460	437.80	85,130	442.50	3,090	358.50	1,860	347.70
80–84.....	269,100	459.20	253,280	464.00	9,220	372.60	5,380	367.90
85–89.....	93,300	469.60	87,740	474.40	3,630	386.70	1,540	392.20
90–94.....	17,580	464.90	16,560	470.50	740	370.40	250	373.20
95 or older.....	1,600	433.60	1,460	434.60	140	423.00	...	...
<b>Nondivorced wives of retired workers.....</b>	2,644,300	432.10	2,436,290	440.00	117,570	352.70	82,140	313.90
<b>Divorced wives of retired workers.....</b>	120,890	426.50	104,010	436.20	12,620	365.60	3,850	361.40
<b>Husbands of retired workers.....</b>	31,980	242.00	20,500	252.00	4,340	247.60	6,870	208.30
<b>Spouses of disabled workers</b>								
<b>Total.....</b>	164,850	\$199.30	124,860	\$208.70	21,090	\$180.30	17,870	\$157.40
<b>Wives of disabled workers.....</b>	160,760	200.50	122,050	210.10	20,410	179.90	17,290	158.00
<b>Entitlement based on care of children.....</b>	111,150	165.90	80,350	174.70	15,520	148.80	14,410	135.80
Under 35.....	21,560	114.60	15,050	120.90	2,860	98.30	3,480	100.10
35–39.....	24,480	137.80	17,770	144.30	3,110	116.30	3,430	124.70
40–44.....	26,430	165.60	19,220	174.60	3,800	146.20	3,130	134.00
45–49.....	20,480	193.30	14,730	201.70	3,150	176.50	2,470	163.10
50–54.....	11,320	226.10	8,310	235.20	1,590	211.50	1,310	187.40
55–59.....	5,410	243.80	4,180	255.00	770	218.80	460	183.70
60–61.....	800	240.40	540	256.40	170	196.60	80	242.40
62–64.....	670	285.60	550	301.90	70	239.00	50	171.20
<b>Entitlement based on age.....</b>	49,610	277.90	41,700	278.50	4,890	278.50	2,880	269.00
62–64.....	28,600	276.10	24,840	277.80	2,210	267.20	1,520	265.10
62.....	10,950	268.70	9,730	269.40	700	272.20	510	253.50
63.....	10,460	278.70	9,010	283.10	910	259.50	520	244.10
64.....	7,190	283.70	6,100	283.50	600	273.10	490	299.40
65–69.....	15,830	279.10	12,820	278.70	1,910	279.30	1,010	281.60
65.....	5,700	268.40	4,640	269.80	640	236.00	370	313.40
66.....	3,750	285.00	3,050	284.00	430	307.00	260	263.20
67.....	2,920	287.00	2,320	289.60	400	285.10	200	261.40
68.....	1,970	275.80	1,650	273.90	240	287.30	70	276.90
69.....	1,490	293.40	1,160	285.70	200	337.40	110	257.70
70–74.....	4,080	285.50	3,160	282.20	590	318.70	310	253.50
70.....	1,230	275.30	940	276.10	140	302.00	140	255.40
71.....	980	268.20	800	259.40	130	345.60	50	207.60
72.....	750	301.00	560	301.80	140	288.50	50	328.00
73.....	630	289.30	480	267.30	100	392.60	40	231.30
74.....	490	316.90	380	335.10	80	264.50	30	226.30
75 or older.....	1,100	277.40	880	280.10	180	276.70	40	221.80
<b>Nondivorced wives of disabled workers.....</b>	156,070	198.10	118,460	208.10	19,690	175.30	16,960	156.20
<b>Divorced wives of disabled workers.....</b>	4,690	278.80	3,590	276.50	720	306.50	330	249.40
<b>Husbands of disabled workers.....</b>	4,090	154.30	2,810	147.10	680	194.00	580	141.30

See footnotes at end of table.

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

Table 5.A1.—Number and average monthly benefit, by type of benefit, race,<sup>1</sup> age, and sex, December 2000—Continued

[Based on 10-percent sample]

Age and sex	Total <sup>2</sup>		White		Black		Other <sup>3</sup>	
	Number <sup>4</sup>	Average monthly benefit	Number	Average monthly benefit	Number	Average monthly benefit	Number	Average monthly benefit
<b>Children</b>								
<b>Total.....</b>	3,810,490	\$406.30	2,590,050	\$434.50	827,670	\$357.80	358,150	\$312.00
<b>Under age 18.....</b>	2,979,660	375.60	1,938,100	400.60	680,400	337.20	329,460	303.50
Under 1.....	9,650	276.20	5,960	290.70	2,370	265.80	1,280	230.10
1.....	24,400	281.00	15,360	288.80	5,680	272.40	3,240	260.50
2.....	36,080	294.20	22,890	312.40	7,930	266.60	5,050	258.80
3.....	50,520	299.70	31,710	320.50	11,550	269.00	7,020	260.90
4.....	61,720	310.10	39,250	326.80	14,240	285.20	8,000	275.40
5.....	77,530	315.50	48,950	334.50	17,910	286.60	10,310	280.10
6.....	97,490	323.40	61,920	345.00	23,040	293.00	11,870	270.80
7.....	119,230	327.20	74,170	347.40	29,720	298.20	14,470	285.80
8.....	141,020	332.40	88,790	357.20	33,470	295.30	17,540	279.00
9.....	166,290	335.70	103,400	358.40	40,880	304.90	20,180	281.90
10.....	192,850	348.20	121,350	370.70	46,050	315.90	23,230	290.80
11.....	213,490	355.90	136,740	379.00	50,460	322.70	23,870	289.40
12.....	238,270	365.50	154,170	390.90	55,330	327.50	25,600	290.90
13.....	255,870	376.50	165,590	400.30	58,920	342.60	28,110	301.00
14.....	284,090	390.40	188,070	416.10	63,430	350.80	29,540	306.00
15.....	311,240	401.90	206,660	427.30	69,440	359.50	31,340	319.40
16.....	337,540	428.20	228,290	453.40	71,840	383.90	33,540	345.50
17.....	362,380	441.40	244,830	467.10	78,140	396.00	35,270	353.70
<b>Disabled, aged 18 or older.....</b>	733,610	518.40	583,510	536.40	126,480	454.20	21,710	409.30
18-19.....	12,310	419.60	8,320	438.40	2,990	387.90	870	361.70
20-24.....	55,370	444.40	36,690	460.40	14,690	420.30	3,530	368.50
25-29.....	64,680	485.30	44,990	504.10	16,230	452.20	3,110	379.20
30-34.....	78,530	512.50	58,610	529.10	16,690	472.40	2,990	410.60
35-39.....	104,010	526.20	80,410	545.60	20,090	466.10	3,370	422.70
40-44.....	108,150	538.40	85,950	558.70	19,260	463.20	2,720	428.60
45-49.....	90,720	548.90	74,700	567.50	13,880	467.10	1,990	422.10
50-54.....	70,190	551.70	60,310	566.50	8,560	462.60	1,230	445.50
55-59.....	50,450	550.10	44,170	562.70	5,580	453.20	640	508.20
60-64.....	35,470	537.80	31,490	547.70	3,270	460.50	650	436.10
65-69.....	25,260	505.40	22,630	515.80	2,390	412.10	230	465.40
70-74.....	18,790	480.40	16,970	486.60	1,580	417.70	240	457.90
75-79.....	11,550	458.90	10,720	464.40	740	384.10	90	418.70
80 or older.....	8,130	431.60	7,550	435.80	530	372.10	50	426.60
<b>Students, aged 18-19.....</b>	97,220	501.00	68,440	526.00	20,790	446.70	6,980	411.80
18.....	92,570	501.60	65,580	526.10	19,360	446.60	6,660	414.40
19.....	4,650	489.80	2,860	524.10	1,430	447.50	320	357.70
<b>Children of retired workers.....</b>	457,960	395.60	339,420	418.50	90,800	347.30	26,670	271.40
<b>Under age 18.....</b>	254,970	364.70	170,080	388.10	64,270	338.60	20,000	252.50
Under 1.....	550	378.50	370	380.70	140	392.50	40	309.50
1.....	1,050	335.30	740	351.50	280	302.10	30	243.00
2.....	2,310	314.00	1,370	332.70	690	302.00	250	244.60
3.....	3,000	335.00	1,900	359.90	820	326.60	260	195.30
4.....	3,770	338.40	2,420	343.10	1,100	341.00	230	295.10
5.....	4,340	341.00	2,450	359.00	1,480	347.00	410	211.60
6.....	6,180	342.20	3,890	351.80	1,770	354.50	500	229.20
7.....	7,310	321.10	4,530	333.80	2,270	319.60	500	218.80
8.....	10,380	326.30	6,400	347.00	3,080	316.50	890	213.50
9.....	11,610	335.10	7,470	356.30	3,230	322.80	860	206.80
10.....	14,120	341.70	8,930	365.70	4,060	317.70	1,090	235.10
11.....	17,010	338.00	11,040	356.20	4,690	326.40	1,240	217.70
12.....	19,590	349.70	12,990	373.00	5,080	319.70	1,470	249.00
13.....	22,440	347.80	14,880	366.80	5,700	334.90	1,790	233.10
14.....	25,980	356.90	17,050	378.00	6,830	333.40	2,070	262.20
15.....	29,630	363.20	20,250	386.40	6,920	337.70	2,400	244.60
16.....	35,290	399.00	24,690	425.80	7,770	354.40	2,780	288.50
17.....	40,410	416.90	28,710	443.00	8,360	378.60	3,190	291.80

See footnotes at end of table.

5.A OASDI Current-Pay Benefits: Summary

Table 5.A1.—Number and average monthly benefit, by type of benefit, race,<sup>1</sup> age, and sex, December 2000—Continued  
 [Based on 10-percent sample]

Age and sex	Total <sup>2</sup>		White		Black		Other <sup>3</sup>	
	Number <sup>4</sup>	Average monthly benefit	Number	Average monthly benefit	Number	Average monthly benefit	Number	Average monthly benefit
<b>Children—Continued</b>								
<b>Disabled, aged 18 or older.....</b>	191,950	\$433.70	161,200	\$448.10	24,270	\$365.40	6,040	\$326.70
18–19.....	1,940	368.70	1,260	412.40	500	294.50	160	271.40
20–24.....	9,300	375.20	6,760	392.20	1,970	345.30	520	255.30
25–29.....	15,530	408.40	12,190	421.60	2,480	370.20	820	331.40
30–34.....	26,300	426.40	21,750	441.80	3,520	355.10	970	345.30
35–39.....	42,240	448.30	35,670	462.60	5,270	376.60	1,250	346.70
40–44.....	43,250	448.00	37,000	462.60	5,070	366.90	1,060	332.50
45–49.....	28,560	440.00	24,730	450.70	3,020	379.90	760	325.80
50–54.....	15,000	427.30	13,120	436.50	1,520	369.10	330	312.80
55–59.....	6,500	436.80	5,790	445.20	630	364.50	70	312.40
60–64.....	2,340	424.90	2,120	436.20	120	337.70	90	313.00
65–69.....	640	382.90	540	394.50	90	317.20	10	346.00
70 or older.....	350	363.50	270	396.00	80	254.10	..	..
<b>Students, aged 18–19.....</b>	11,040	447.00	8,140	468.10	2,260	401.10	630	340.70
18.....	10,480	447.20	7,800	468.80	2,070	396.60	600	344.10
19.....	560	442.20	340	452.90	190	449.90	30	271.30
<b>Children of deceased workers.....</b>	1,877,940	548.70	1,270,430	589.50	427,570	464.90	158,870	448.30
<b>Under age 18.....</b>	1,343,190	536.20	853,120	584.10	327,160	452.00	143,640	442.80
Under 1.....	2,020	490.50	1,120	563.70	580	421.80	320	359.10
1.....	6,750	497.80	3,980	526.00	1,780	450.30	990	469.60
2.....	11,460	492.70	6,830	547.40	2,930	398.10	1,690	434.40
3.....	17,440	484.70	10,640	536.90	4,240	390.60	2,550	424.80
4.....	23,000	495.30	14,050	544.60	5,670	409.90	3,280	432.00
5.....	30,560	494.20	18,410	544.10	7,900	402.10	4,200	451.30
6.....	39,500	494.50	24,210	548.30	10,260	401.60	4,850	423.20
7.....	50,770	491.50	30,080	540.50	13,830	411.40	6,450	436.70
8.....	61,080	494.60	37,310	547.70	15,460	401.80	7,620	428.80
9.....	73,350	493.30	43,570	543.60	19,880	415.20	8,960	425.90
10.....	86,620	509.90	52,450	560.30	22,330	430.70	10,520	427.70
11.....	96,810	516.80	59,920	566.90	24,430	436.40	10,910	421.50
12.....	109,340	527.60	68,780	577.80	27,250	445.10	11,340	429.50
13.....	118,710	535.20	74,710	583.10	29,110	455.50	12,730	436.20
14.....	132,820	551.30	87,210	595.90	30,910	468.00	12,730	446.00
15.....	148,030	557.40	96,950	602.30	34,930	472.30	13,620	453.60
16.....	160,100	572.20	106,050	615.50	36,040	491.00	15,430	463.60
17.....	174,830	581.50	116,850	620.90	39,630	502.50	15,450	479.40
<b>Disabled, aged 18 or older.....</b>	483,570	575.10	381,720	594.30	88,860	502.80	11,890	493.20
18–19.....	5,550	566.60	3,720	588.10	1,420	527.00	360	496.60
20–24.....	26,850	571.60	16,950	597.70	8,030	528.20	1,600	503.30
25–29.....	33,450	592.00	21,780	628.50	10,180	524.90	1,300	489.50
30–34.....	41,830	607.70	29,270	636.70	10,980	542.80	1,420	508.00
35–39.....	55,730	600.80	40,410	635.40	13,520	510.80	1,740	492.30
40–44.....	63,230	604.50	47,790	636.80	13,730	503.60	1,610	495.00
45–49.....	61,950	599.90	49,830	626.00	10,790	493.10	1,230	481.50
50–54.....	55,160	585.60	47,160	602.80	7,040	482.80	900	494.10
55–59.....	43,950	566.80	38,380	580.50	4,950	464.50	570	532.20
60–64.....	33,130	545.80	29,370	555.70	3,150	465.10	560	455.90
65–69.....	24,620	508.60	22,090	518.70	2,300	415.80	220	470.90
70–74.....	18,600	481.90	16,840	487.40	1,520	424.00	240	457.90
75–79.....	11,440	459.80	10,630	465.00	720	388.00	90	418.70
80 or older.....	8,080	431.40	7,500	435.60	530	372.10	50	426.60
<b>Students, aged 18–19.....</b>	51,180	626.30	35,590	664.60	11,550	536.50	3,340	528.20
18.....	48,540	628.50	33,950	666.10	10,720	539.10	3,210	529.00
19.....	2,640	586.90	1,640	634.70	830	503.60	130	510.50

See footnotes at end of table.

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

Table 5.A1.—Number and average monthly benefit, by type of benefit, race,<sup>1</sup> age, and sex, December 2000—*Continued*

[Based on 10-percent sample]

Age and sex	Total <sup>2</sup>		White		Black		Other <sup>3</sup>	
	Number <sup>4</sup>	Average monthly benefit	Number	Average monthly benefit	Number	Average monthly benefit	Number	Average monthly benefit
<b>Children—Continued</b>								
<b>Children of disabled workers</b> .....	1,474,590	\$228.20	980,200	\$239.20	309,300	\$212.90	172,610	\$192.80
<b>Under age 18</b> .....	1,381,500	221.40	914,900	231.70	288,970	206.80	165,820	188.90
Under 1 .....	7,080	207.10	4,470	214.80	1,650	200.20	920	181.80
1 .....	16,600	189.40	10,640	195.70	3,620	182.60	2,220	167.50
2 .....	22,310	190.20	14,690	201.30	4,310	171.50	3,110	164.50
3 .....	30,080	188.90	19,170	196.40	6,490	182.30	4,210	165.70
4 .....	34,950	185.10	22,780	190.80	7,470	182.40	4,490	159.90
5 .....	42,630	184.80	28,090	194.90	8,530	169.10	5,700	158.80
6 .....	51,810	190.70	33,820	198.70	11,010	182.00	6,520	160.50
7 .....	61,150	191.60	39,560	202.00	13,620	179.80	7,520	160.80
8 .....	69,560	190.80	45,080	201.00	14,930	180.60	9,030	159.00
9 .....	81,330	193.60	52,360	204.50	17,770	178.20	10,360	163.70
10 .....	92,110	197.10	59,970	205.70	19,660	185.10	11,620	172.10
11 .....	99,670	202.80	65,780	211.60	21,340	191.70	11,720	173.90
12 .....	109,340	206.20	72,400	216.60	23,000	189.80	12,790	172.80
13 .....	114,720	217.90	76,000	227.10	24,110	208.00	13,590	183.20
14 .....	125,290	226.70	83,810	236.70	25,690	214.30	14,740	191.20
15 .....	133,580	238.10	89,460	246.90	27,590	222.30	15,320	211.80
16 .....	142,150	273.10	97,550	284.20	28,030	254.30	15,330	236.90
17 .....	147,140	281.60	99,270	293.20	30,150	260.70	16,630	248.70
<b>Disabled, aged 18 or older</b> .....	58,090	326.20	40,590	342.10	13,350	292.40	3,780	277.50
18–19 .....	4,820	270.80	3,340	281.60	1,070	247.00	350	264.30
20–24 .....	19,220	300.10	12,980	316.50	4,690	266.90	1,410	257.30
25–29 .....	15,700	333.90	11,020	349.30	3,570	301.80	990	273.90
30–34 .....	10,400	347.40	7,590	363.70	2,190	307.70	600	285.70
35–39 .....	6,040	382.40	4,330	390.90	1,300	365.00	380	354.30
40 or older .....	1,910	372.60	1,330	401.40	530	304.50	50	326.00
<b>Students, aged 18–19</b> .....	35,000	334.90	24,710	345.40	6,980	312.80	3,010	297.50
18 .....	33,550	335.10	23,830	345.40	6,570	311.60	2,850	300.20
19 .....	1,450	331.20	880	345.40	410	332.60	160	249.70
<b>Widowed mothers and fathers</b>								
<b>Total</b> .....	201,270	\$593.00	141,800	\$633.10	34,090	\$508.40	22,740	\$469.60
Under 20 .....	130	308.90	80	388.60			50	181.40
20–24 .....	2,460	444.00	1,730	462.00	300	382.10	430	414.90
20 .....	110	402.90	110	402.90				
21 .....	310	432.90	150	444.70	50	348.40	110	455.30
22 .....	460	461.70	330	494.00	70	389.90	60	367.70
23 .....	610	417.70	480	436.00	40	400.80	90	327.70
24 .....	970	460.30	660	478.60	140	384.90	170	451.60
25–29 .....	10,180	483.90	6,830	514.60	1,620	392.90	1,640	452.60
25 .....	1,300	474.50	890	504.90	190	342.00	220	466.00
26 .....	1,470	471.70	1,010	501.30	220	358.60	230	455.80
27 .....	1,890	487.00	1,400	516.80	250	379.40	220	437.10
28 .....	2,450	463.30	1,460	481.40	440	421.50	510	448.70
29 .....	3,070	508.40	2,070	547.10	520	408.20	460	456.30
30–34 .....	23,560	513.70	16,110	548.10	3,560	439.60	3,610	434.30
30 .....	3,640	480.90	2,440	514.10	520	434.50	640	394.10
31 .....	3,880	519.90	2,810	548.90	550	423.60	460	454.50
32 .....	4,450	509.00	3,000	542.20	710	450.80	660	423.30
33 .....	5,390	520.50	3,530	563.20	890	429.10	920	444.60
34 .....	6,200	526.50	4,330	558.40	890	454.10	930	449.40
35–39 .....	41,000	552.40	28,750	597.10	6,730	452.60	5,010	434.40
35 .....	6,570	522.70	4,500	569.40	1,020	425.10	950	409.90
36 .....	7,840	540.40	5,500	588.80	1,310	452.10	910	395.60
37 .....	8,120	551.10	5,570	599.80	1,480	434.00	980	456.80
38 .....	9,500	556.10	6,760	601.90	1,510	436.40	1,100	438.10
39 .....	8,970	581.80	6,420	616.30	1,410	509.80	1,070	464.80
40–44 .....	45,890	616.10	32,690	662.50	7,540	510.50	4,960	475.40
40 .....	8,800	600.90	6,340	642.90	1,390	507.40	960	456.40
41 .....	9,490	615.40	6,840	660.60	1,620	499.80	900	481.80
42 .....	9,650	619.10	6,960	664.70	1,470	512.80	1,050	469.00
43 .....	8,980	612.20	6,240	664.70	1,510	509.00	1,120	468.00
44 .....	8,970	632.30	6,310	679.60	1,550	523.50	930	504.80
45–49 .....	35,700	640.00	25,130	676.30	5,990	567.60	3,980	510.50
45 .....	8,380	625.80	5,890	667.30	1,380	523.70	1,010	510.00
46 .....	7,680	650.00	5,430	681.70	1,220	606.60	910	500.20
47 .....	7,300	646.50	5,210	688.00	1,210	568.10	760	501.30
48 .....	6,410	650.60	4,380	680.40	1,150	594.20	750	550.50
49 .....	5,930	627.30	4,220	663.30	1,030	550.30	550	487.10

See footnotes at end of table.



5.A OASDI Current-Pay Benefits: Summary

Table 5.A1.—Number and average monthly benefit, by type of benefit, race,<sup>1</sup> age, and sex, December 2000—Continued  
 [Based on 10-percent sample]

Age and sex	Total <sup>2</sup>		White		Black		Other <sup>3</sup>	
	Number <sup>4</sup>	Average monthly benefit	Number	Average monthly benefit	Number	Average monthly benefit	Number	Average monthly benefit
<b>Widowed mothers and fathers—Continued</b>								
50-54.....	20,490	\$653.80	14,440	\$693.20	3,850	\$567.10	1,850	\$518.70
50.....	4,890	637.50	3,230	688.40	1,010	544.90	550	507.80
51.....	4,280	636.90	2,910	673.60	870	573.80	400	474.80
52.....	3,880	658.30	2,710	684.20	740	578.50	360	615.00
53.....	4,000	686.30	2,940	726.10	760	598.10	270	496.70
54.....	3,440	655.20	2,650	693.50	470	534.10	270	499.60
55-59.....	11,340	649.50	8,370	677.40	2,240	575.90	670	537.30
55.....	2,720	654.60	1,870	686.70	600	584.70	230	586.30
56.....	2,320	632.40	1,840	655.20	360	511.70	100	614.00
57.....	2,130	664.80	1,590	690.50	390	616.40	150	518.50
58.....	2,130	656.50	1,600	676.60	440	623.60	80	405.50
59.....	2,040	638.80	1,470	680.00	450	533.80	110	486.50
60-61.....	3,720	640.00	2,540	683.20	910	549.50	240	523.80
60.....	1,830	659.40	1,250	706.80	450	566.80	100	485.20
61.....	1,890	621.20	1,290	660.40	460	532.60	140	551.40
62 or older.....	6,800	630.40	5,130	654.90	1,350	552.30	300	568.90
<b>Widowed mothers.....</b>	<b>191,470</b>	<b>598.20</b>	<b>135,120</b>	<b>639.70</b>	<b>32,160</b>	<b>508.80</b>	<b>21,660</b>	<b>472.10</b>
<b>Mothers.....</b>	<b>173,310</b>	<b>599.20</b>	<b>120,960</b>	<b>643.00</b>	<b>29,790</b>	<b>506.80</b>	<b>20,190</b>	<b>472.40</b>
<b>Surviving divorced mothers.....</b>	<b>18,160</b>	<b>588.50</b>	<b>14,160</b>	<b>611.70</b>	<b>2,370</b>	<b>533.30</b>	<b>1,470</b>	<b>468.30</b>
<b>Widowed fathers.....</b>	<b>9,800</b>	<b>491.40</b>	<b>6,680</b>	<b>498.70</b>	<b>1,930</b>	<b>501.70</b>	<b>1,080</b>	<b>420.20</b>
<b>Nondisabled widows and widowers</b>								
<b>Total.....</b>	<b>4,698,660</b>	<b>\$810.20</b>	<b>4,182,110</b>	<b>\$829.90</b>	<b>412,210</b>	<b>\$646.00</b>	<b>91,730</b>	<b>\$644.50</b>
<b>Widows.....</b>	<b>4,661,540</b>	<b>811.80</b>	<b>4,152,820</b>	<b>831.40</b>	<b>406,230</b>	<b>646.90</b>	<b>90,000</b>	<b>646.60</b>
60-61.....	128,420	773.90	108,220	796.60	15,960	661.40	4,150	617.70
60.....	52,670	785.20	44,450	804.60	6,740	683.60	1,450	668.50
61.....	75,750	766.10	63,770	791.00	9,220	645.10	2,700	590.40
62-64.....	316,750	774.10	268,880	797.40	37,050	648.70	10,070	618.20
62.....	96,250	768.10	81,770	791.60	11,270	642.90	3,070	601.90
63.....	103,930	776.50	87,880	798.60	12,540	662.50	3,290	634.90
64.....	116,570	776.80	99,230	801.10	13,240	640.50	3,710	616.90
65-69.....	693,230	814.30	594,980	839.10	79,260	666.20	17,240	646.80
65.....	135,490	800.40	115,110	826.20	16,520	656.00	3,610	646.40
66.....	135,810	820.50	116,900	843.40	15,300	685.40	3,300	645.00
67.....	133,970	815.50	115,180	841.20	15,290	662.10	3,130	626.40
68.....	141,780	816.10	121,110	842.20	16,290	661.80	3,930	656.40
69.....	146,180	818.50	126,680	841.90	15,860	666.70	3,270	657.10
70-74.....	809,890	815.10	709,980	837.40	80,060	657.20	17,220	641.00
70.....	150,940	817.00	131,510	839.90	15,530	668.40	3,380	628.30
71.....	151,150	820.00	131,350	845.70	15,710	648.20	3,490	633.30
72.....	159,610	817.00	140,460	838.60	15,680	663.00	3,030	624.80
73.....	171,110	812.10	150,520	833.20	16,340	654.60	3,700	654.10
74.....	177,080	810.70	156,140	831.30	16,800	652.60	3,620	660.40
75-79.....	940,570	813.70	843,090	832.90	77,920	641.90	16,770	645.30
75.....	178,360	808.80	158,190	829.40	16,180	647.30	3,510	636.20
76.....	189,010	805.40	168,790	825.70	16,070	635.70	3,660	617.70
77.....	186,690	811.40	167,270	830.70	15,610	640.60	3,200	635.30
78.....	190,390	817.40	170,860	836.60	15,500	642.70	3,410	642.30
79.....	196,120	824.60	177,980	841.10	14,560	643.10	2,990	703.60
80-84.....	799,700	842.00	728,880	859.10	56,260	652.10	12,180	678.70
80.....	187,070	835.50	169,840	853.30	13,650	642.60	2,950	681.50
81.....	165,910	837.30	149,950	855.00	12,560	657.20	2,840	704.70
82.....	159,900	851.30	146,630	866.80	10,470	662.30	2,280	668.30
83.....	145,490	850.60	133,410	866.40	9,620	663.20	2,070	676.50
84.....	141,330	836.90	129,050	855.00	9,960	637.50	2,040	652.20
85-89.....	576,030	817.80	531,930	832.20	34,840	617.80	7,710	671.20
85.....	135,180	832.70	124,420	846.50	8,450	652.10	1,830	672.00
86.....	125,790	827.00	115,980	841.00	7,590	626.40	1,800	696.60
87.....	116,450	817.90	107,400	833.40	7,160	604.90	1,580	676.00
88.....	106,430	804.90	98,180	821.00	6,660	598.70	1,380	624.50
89.....	92,180	798.00	85,950	810.70	4,980	590.70	1,120	679.70
90-94.....	293,340	782.20	272,080	795.60	17,370	599.20	3,460	641.20
95 or older.....	103,610	733.10	94,780	748.50	7,510	554.10	1,200	612.90
<b>Nondisabled widows.....</b>	<b>4,365,200</b>	<b>811.00</b>	<b>3,898,730</b>	<b>830.70</b>	<b>369,880</b>	<b>640.50</b>	<b>84,780</b>	<b>644.70</b>
<b>Surviving divorced wives (nondisabled)...</b>	<b>296,340</b>	<b>823.60</b>	<b>254,090</b>	<b>842.70</b>	<b>36,350</b>	<b>711.90</b>	<b>5,220</b>	<b>677.50</b>

See footnotes at end of table.

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

Table 5.A1.—Number and average monthly benefit, by type of benefit, race, <sup>1</sup> age, and sex, December 2000—*Continued*

[Based on 10-percent sample]

Age and sex	Total <sup>2</sup>		White		Black		Other <sup>3</sup>	
	Number <sup>4</sup>	Average monthly benefit	Number	Average monthly benefit	Number	Average monthly benefit	Number	Average monthly benefit
<b>Nondisabled widows and widowers—Continued</b>								
<b>Widowers.....</b>	37,120	\$606.30	29,290	\$614.90	5,980	\$585.80	1,730	\$533.90
60–61.....	7,030	577.80	5,810	578.30	950	590.70	270	521.60
62–64.....	9,920	658.00	8,050	663.40	1,450	644.30	390	600.10
65–69.....	6,890	668.40	5,110	686.70	1,340	636.00	390	562.20
70–74.....	4,030	624.30	3,010	646.70	770	548.40	240	586.70
75–79.....	3,330	538.70	2,430	557.20	670	502.60	220	452.80
80–84.....	2,300	533.50	1,750	551.30	400	501.30	130	368.30
85–89.....	2,230	490.70	1,900	491.60	250	496.40	80	452.60
90 or older.....	1,390	487.90	1,230	489.30	150	476.60	10	495.00
<b>Disabled widows and widowers</b>								
<b>Total.....</b>	200,130	\$518.90	149,080	\$538.50	41,470	\$463.40	8,840	\$449.50
50–54.....	27,540	518.90	19,760	538.50	6,320	472.50	1,310	454.60
50.....	2,170	529.00	1,340	568.60	710	472.60	90	391.00
51.....	3,980	509.50	2,750	528.00	1,010	454.20	190	553.60
52.....	5,600	530.40	3,920	553.00	1,450	482.70	230	445.40
53.....	7,610	521.30	5,530	543.90	1,630	463.10	400	452.50
54.....	8,180	510.70	6,220	522.60	1,520	485.00	400	429.50
55–59.....	75,290	519.30	56,060	537.60	15,440	467.30	3,520	454.10
55.....	10,020	524.10	7,330	546.10	2,090	475.30	580	429.70
56.....	12,730	515.30	9,250	533.20	2,690	473.10	740	449.00
57.....	15,040	519.80	11,220	531.80	3,020	484.50	760	473.60
58.....	17,830	515.50	13,420	530.80	3,680	465.30	620	474.50
59.....	19,670	522.40	14,840	546.60	3,960	447.90	820	442.70
60–64.....	97,300	518.60	73,260	539.10	19,710	457.50	4,010	443.80
60.....	20,940	520.70	15,360	540.80	4,320	462.50	1,150	460.70
61.....	20,490	520.60	15,510	542.10	4,010	455.70	900	450.80
62.....	19,150	520.50	14,430	539.00	3,940	468.80	720	417.60
63.....	18,930	519.80	14,250	541.20	3,980	458.90	650	435.00
64.....	17,790	510.70	13,710	531.80	3,460	438.90	590	441.70
<b>Disabled widows.....</b>	195,340	523.00	145,890	542.70	40,160	465.90	8,580	453.30
<b>Widows.....</b>	168,590	523.40	125,440	544.40	35,500	463.70	7,070	450.90
<b>Surviving divorced wives.....</b>	26,750	520.10	20,450	532.80	4,660	482.70	1,510	464.40
<b>Disabled widowers.....</b>	4,790	352.80	3,190	342.80	1,310	387.20	260	326.60
<b>Parents</b>								
<b>Total.....</b>	3,000	\$701.00	1,830	\$735.50	360	\$643.50	760	\$652.00
62–64.....	30	688.70	10	666.00	...	...	20	700.00
65–69.....	270	752.90	110	828.20	10	1,023.00	140	687.40
70–74.....	320	756.80	120	796.50	30	1,114.30	150	637.10
75–79.....	560	686.60	360	724.70	30	626.00	160	627.10
80–84.....	550	774.10	320	817.90	100	630.10	130	777.00
85–89.....	570	676.60	380	720.90	70	584.70	120	589.90
90 or older.....	700	629.80	530	671.80	120	543.90	40	439.50
<b>Men.....</b>	370	620.80	150	669.20	10	520.00	210	591.00
<b>Women.....</b>	2,630	712.20	1,680	741.40	350	647.00	550	675.30

<sup>1</sup> Race and ethnic designations are collected from the form SS-5 (Application for a Social Security Card). For dependents and survivor beneficiaries, race is assumed to be the same as that shown on the SS-5 for the wage earner on whose earnings record the benefit is based.

<sup>2</sup> "Total" includes 173,110 persons of unknown race. In years prior to 1993, persons of unknown race were included with "White."

<sup>3</sup> The "Other" classification includes Asians and Pacific Islanders, American Indians and Alaskan Natives, and a subset of the total number of beneficiaries of Hispanic origin. The distribution of beneficiaries between these three groups is not available.

<sup>4</sup> Provisions for Railroad Retirement beneficiaries are described in the section Social Security (Old-Age, Survivors, and Disability Insurance).

<sup>5</sup> Includes special-age 72 beneficiaries.

5.A OASDI Current-Pay Benefits: Summary

Table 5.A3.—Number and average monthly benefit, with reduction for early retirement, by type of benefit, race, <sup>1</sup> age, and sex, December 2000

[Based on 10-percent sample]

Age and sex	Total <sup>2</sup>		White		Black		Other	
	Number	Average monthly benefit	Number	Average monthly benefit	Number	Average monthly benefit	Number	Average monthly benefit
<b>Retired workers</b>								
<b>Total.....</b>	20,319,630	\$778.50	18,275,920	\$791.00	1,528,210	\$674.70	469,840	\$635.50
62-64.....	2,553,070	766.10	2,245,920	779.20	218,270	695.70	88,700	605.30
62.....	703,160	768.80	620,630	781.20	57,820	704.60	24,680	607.10
63.....	903,650	772.70	792,860	786.70	79,560	697.70	31,200	607.90
64.....	946,260	757.70	832,430	770.70	80,890	687.40	32,820	601.60
65-69.....	5,044,450	768.90	4,462,390	782.90	423,520	678.10	154,900	616.40
65.....	1,091,170	771.90	959,760	786.70	94,940	679.60	36,230	622.00
66.....	1,034,850	760.90	913,340	775.50	87,700	672.30	33,360	595.60
67.....	964,050	764.80	850,900	779.00	82,020	673.10	30,430	616.10
68.....	987,430	779.30	873,110	792.80	84,980	689.90	28,540	637.60
69.....	966,950	767.50	865,280	780.40	73,880	674.80	26,340	612.10
70-74.....	4,573,500	771.90	4,125,390	783.90	336,750	669.70	97,630	631.30
70.....	972,860	765.50	874,580	777.60	71,960	671.70	24,660	617.20
71.....	916,440	764.30	824,360	776.50	68,900	665.30	20,310	618.90
72.....	918,450	776.20	828,940	788.00	67,540	675.10	18,690	641.70
73.....	911,260	781.20	822,550	793.50	67,290	672.50	18,400	642.90
74.....	854,490	772.90	774,960	784.50	61,060	663.10	15,570	643.80
75-79.....	3,770,630	772.30	3,436,600	783.00	254,470	662.20	66,120	657.50
75.....	839,380	787.20	761,580	798.60	59,210	678.00	15,820	664.40
76.....	802,110	771.40	730,710	782.30	54,480	661.60	14,070	653.70
77.....	746,180	766.70	681,150	777.40	49,180	653.10	13,410	650.90
78.....	702,080	766.80	639,380	776.90	47,710	663.10	12,110	661.20
79.....	680,880	767.00	623,780	777.30	43,890	650.70	10,710	656.30
80-84.....	2,456,900	810.30	2,255,330	821.00	156,540	682.00	35,460	704.40
80.....	600,080	766.20	550,240	776.30	38,400	652.80	9,110	647.10
81.....	524,740	779.80	479,270	790.80	35,550	656.40	7,770	675.30
82.....	500,890	818.80	461,520	829.20	30,190	687.40	7,100	704.70
83.....	439,390	843.00	404,590	853.70	26,750	704.40	6,350	755.10
84.....	391,800	871.10	359,710	882.40	25,650	731.60	5,130	787.00
85-89.....	1,331,180	828.50	1,219,590	840.30	88,490	687.80	19,170	734.00
85.....	346,350	854.00	319,200	864.90	20,910	712.90	5,060	757.50
86.....	304,630	836.10	278,720	848.50	20,520	688.60	4,410	741.80
87.....	262,760	821.60	240,960	832.30	17,270	691.70	3,830	732.40
88.....	230,660	809.80	210,010	821.40	16,650	679.30	3,280	719.70
89.....	186,780	802.00	170,700	815.10	13,140	652.10	2,590	695.50
90-94.....	477,800	772.20	432,150	787.00	38,230	620.90	6,410	674.80
95 or older.....	112,100	708.00	98,550	727.60	11,940	552.80	1,450	641.40
<b>Men.....</b>	10,074,260	867.60	9,082,610	883.50	723,250	734.80	249,910	685.10
62-64.....	1,330,230	913.70	1,167,190	937.40	114,470	773.90	48,430	671.70
62.....	358,360	929.20	315,670	952.10	29,560	792.10	13,110	686.50
63.....	471,970	922.70	413,170	948.10	41,800	774.50	16,980	668.90
64.....	499,900	894.00	438,350	916.80	43,110	760.70	18,340	663.70
65-69.....	2,712,240	888.60	2,404,730	909.40	220,460	746.30	84,760	675.70
65.....	584,690	902.30	514,780	925.50	49,530	751.80	20,190	682.40
66.....	554,830	884.10	490,040	906.60	45,990	741.10	18,510	647.20
67.....	518,080	881.70	458,080	903.00	42,990	736.70	16,550	673.70
68.....	530,450	897.80	470,820	917.30	43,960	759.40	15,210	703.90
69.....	524,190	875.60	471,010	893.00	37,990	741.10	14,300	675.20
70-74.....	2,426,420	869.40	2,200,150	885.00	168,770	728.70	51,660	678.70
70.....	527,960	868.50	476,570	885.00	37,380	731.30	13,070	667.60
71.....	492,770	863.90	446,050	879.30	34,700	729.50	10,730	668.60
72.....	488,210	876.50	442,960	891.80	34,200	735.90	9,870	693.90
73.....	476,750	878.70	432,570	894.70	32,990	732.20	9,820	681.10
74.....	440,730	859.00	402,000	873.50	29,500	712.10	8,170	688.30
75-79.....	1,869,910	834.10	1,712,430	846.10	118,110	705.80	34,050	692.60
75.....	426,420	873.00	389,000	886.80	28,220	731.80	8,050	714.70
76.....	400,410	844.50	366,340	856.90	25,690	715.60	7,340	692.30
77.....	371,060	825.20	340,700	836.80	22,390	694.80	7,020	687.50
78.....	345,440	814.10	315,890	825.60	22,120	694.60	6,270	680.40
79.....	326,580	802.00	300,500	812.40	19,690	680.70	5,370	680.60
80-84.....	1,086,550	834.60	1,004,370	844.30	61,170	711.60	17,600	724.30
80.....	282,350	781.70	260,330	791.80	16,290	662.00	4,850	658.80
81.....	238,580	795.00	219,350	804.40	14,640	682.20	3,860	697.30
82.....	220,500	847.90	204,640	856.90	11,710	729.60	3,400	723.60
83.....	185,180	880.60	172,030	889.60	9,500	752.00	3,090	779.40
84.....	159,940	915.60	148,020	925.40	9,030	782.90	2,400	830.20

See footnotes at end of table.

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

Table 5.A3.—Number and average monthly benefit, with reduction for early retirement, by type of benefit, race, <sup>1</sup> age, and sex, December 2000—*Continued*

[Based on 10-percent sample]

Age and sex	Total <sup>2</sup>		White		Black		Other	
	Number	Average monthly benefit	Number	Average monthly benefit	Number	Average monthly benefit	Number	Average monthly benefit
<b>Retired workers—Continued</b>								
85–89.....	489,730	\$856.70	450,760	\$865.70	28,170	\$743.20	9,510	\$768.70
85.....	136,470	896.40	126,610	904.90	7,140	778.00	2,330	806.90
86.....	114,430	863.40	105,060	872.60	6,800	751.20	2,160	784.80
87.....	95,730	849.10	88,280	857.50	5,340	744.80	1,880	751.60
88.....	81,090	830.60	74,250	838.70	4,940	727.50	1,710	756.10
89.....	62,010	802.90	56,560	813.50	3,950	684.20	1,430	719.40
90–94.....	136,290	761.50	123,230	772.70	9,550	638.90	3,310	701.10
95 or older.....	22,890	687.70	19,750	704.10	2,550	560.90	590	688.00
<b>Women.....</b>	<b>10,245,370</b>	<b>690.80</b>	<b>9,193,310</b>	<b>699.70</b>	<b>804,960</b>	<b>620.60</b>	<b>219,930</b>	<b>579.10</b>
62–64.....	1,222,840	605.50	1,078,730	608.10	103,800	609.60	40,270	525.50
62.....	344,800	602.00	304,960	604.20	28,260	613.20	11,570	517.20
63.....	431,680	608.80	379,690	611.10	37,760	612.70	14,220	535.10
64.....	446,360	605.00	394,080	608.10	37,780	603.70	14,480	522.90
65–69.....	2,332,210	629.60	2,057,660	635.10	203,060	604.00	70,140	544.70
65.....	506,480	621.30	444,980	626.10	45,410	600.90	16,040	546.10
66.....	480,020	618.40	423,300	623.70	41,710	596.40	14,850	531.30
67.....	445,970	628.90	392,820	634.40	39,030	603.20	13,880	547.30
68.....	456,980	641.60	402,290	647.10	41,020	615.40	13,330	561.80
69.....	442,760	639.50	394,270	646.00	35,890	604.60	12,040	537.20
70–74.....	2,147,080	661.70	1,925,240	668.40	167,980	610.40	45,970	578.20
70.....	444,900	643.20	398,010	648.90	34,580	607.40	11,590	560.50
71.....	423,670	648.50	378,310	655.30	34,200	600.20	9,580	563.10
72.....	430,240	662.40	385,980	668.80	33,340	612.70	8,820	583.30
73.....	434,510	674.20	389,980	681.30	34,300	615.10	8,580	599.20
74.....	413,760	681.20	372,960	688.50	31,560	617.20	7,400	594.80
75–79.....	1,900,720	711.60	1,724,170	720.30	136,360	624.40	32,070	620.30
75.....	412,960	698.70	372,580	706.50	30,990	629.00	7,770	612.40
76.....	401,700	698.60	364,370	707.30	28,790	613.40	6,730	611.70
77.....	375,120	708.70	340,450	717.90	26,790	618.30	6,390	610.80
78.....	356,640	721.00	323,490	729.30	25,590	635.90	5,840	640.60
79.....	354,300	734.70	323,280	744.60	24,200	626.20	5,340	631.80
80–84.....	1,370,350	791.00	1,250,960	802.40	95,370	663.10	17,860	684.80
80.....	317,730	752.30	289,910	762.40	22,110	646.10	4,260	633.70
81.....	286,160	767.20	259,920	779.40	20,910	638.40	3,910	653.60
82.....	280,390	795.90	256,880	807.20	18,480	660.70	3,700	687.30
83.....	254,210	815.60	232,560	827.10	17,250	678.20	3,260	732.20
84.....	231,860	840.30	211,690	852.30	16,620	703.80	2,730	749.10
85–89.....	841,450	812.10	768,830	825.30	60,320	661.90	9,660	700.00
85.....	209,880	826.40	192,590	838.60	13,770	679.20	2,730	715.40
86.....	190,200	819.70	173,660	834.00	13,720	657.50	2,250	700.50
87.....	167,030	805.80	152,680	817.70	11,930	667.90	1,950	713.90
88.....	149,570	798.60	135,760	812.00	11,710	659.00	1,570	680.00
89.....	124,770	801.50	114,140	815.90	9,190	638.30	1,160	666.00
90–94.....	341,510	776.40	308,920	792.70	28,680	614.90	3,100	646.80
95 or older.....	89,210	713.30	78,800	733.60	9,390	550.60	860	609.50
<b>Disabled workers</b>								
<b>Total.....</b>	<b>34,560</b>	<b>\$924.90</b>	<b>27,970</b>	<b>\$965.10</b>	<b>4,940</b>	<b>\$788.30</b>	<b>1,650</b>	<b>\$652.60</b>
62.....	3,830	990.00	3,200	1,034.20	390	798.50	240	711.50
63.....	11,770	947.40	9,650	989.10	1,490	806.60	630	641.70
64.....	18,960	897.80	15,120	935.20	3,060	778.10	780	643.30
<b>Men.....</b>	<b>22,140</b>	<b>1,051.70</b>	<b>18,510</b>	<b>1,092.60</b>	<b>2,550</b>	<b>903.80</b>	<b>1,080</b>	<b>699.80</b>
62.....	2,520	1,101.80	2,180	1,152.40	180	819.40	160	729.60
63.....	7,500	1,079.80	6,400	1,117.90	710	948.90	390	692.20
64.....	12,120	1,023.90	9,930	1,063.20	1,660	893.60	530	696.40
<b>Women.....</b>	<b>12,420</b>	<b>698.90</b>	<b>9,460</b>	<b>715.70</b>	<b>2,390</b>	<b>665.20</b>	<b>570</b>	<b>563.20</b>
62.....	1,310	774.90	1,020	781.50	210	780.60	80	675.40
63.....	4,270	714.90	3,250	735.40	780	677.10	240	559.80
64.....	6,840	674.40	5,190	690.30	1,400	641.20	250	530.60

See footnotes at end of table.

5.A OASDI Current-Pay Benefits: Summary

Table 5.A3.—Number and average monthly benefit, with reduction for early retirement, by type of benefit, race, <sup>1</sup> age, and sex, December 2000—Continued

[Based on 10-percent sample]

Age and sex	Total <sup>2</sup>		White		Black		Other	
	Number	Average monthly benefit	Number	Average monthly benefit	Number	Average monthly benefit	Number	Average monthly benefit
<b>Spouses</b>								
<b>Total .....</b>	2,264,660	408.50	2,098,870	415.10	97,580	336.00	61,870	304.90
<b>Wives.....</b>	2,254,310	409.40	2,091,400	415.80	96,070	337.90	60,510	307.30
62-64 .....	332,990	393.30	301,360	402.30	17,100	320.40	14,070	291.40
62 .....	87,640	387.30	79,630	395.00	4,390	325.90	3,550	293.20
63 .....	115,820	391.20	104,820	400.60	6,060	319.10	4,790	280.40
64 .....	129,530	399.10	116,910	408.80	6,650	318.10	5,730	299.50
65-69 .....	650,350	414.20	595,090	422.40	32,310	340.60	21,400	302.10
65 .....	136,280	413.70	122,960	423.10	7,520	336.90	5,530	311.50
66 .....	130,830	411.60	119,080	419.70	6,930	349.80	4,490	299.00
67 .....	124,630	413.00	113,780	422.50	6,150	320.70	4,470	301.20
68 .....	129,580	415.30	119,440	422.90	6,230	338.40	3,540	302.50
69 .....	129,030	417.30	119,830	423.70	5,480	359.00	3,370	291.80
70-74 .....	593,960	413.50	553,600	419.30	24,950	346.10	13,460	306.80
70 .....	131,480	416.60	121,920	422.80	6,010	355.20	3,240	304.80
71 .....	121,610	414.40	112,930	421.00	5,080	340.80	3,190	308.70
72 .....	120,050	413.90	111,850	419.60	5,130	347.40	2,590	304.40
73 .....	116,410	413.60	109,430	418.60	4,570	345.10	2,010	309.90
74 .....	104,410	408.10	97,470	413.70	4,160	338.70	2,430	306.90
75-79 .....	414,680	405.10	391,100	409.20	14,170	336.80	7,870	328.90
75 .....	97,740	407.10	91,780	411.50	3,680	346.10	1,950	331.80
76 .....	91,210	400.40	85,960	404.40	3,330	337.30	1,590	317.50
77 .....	81,540	404.10	76,670	408.90	2,810	323.10	1,700	325.50
78 .....	76,020	405.40	71,740	409.30	2,500	332.00	1,560	340.70
79 .....	68,170	409.60	64,950	412.70	1,850	344.60	1,070	328.50
80-84 .....	193,800	421.90	184,920	425.20	5,320	344.50	2,880	349.10
85-89 .....	59,180	400.00	56,420	402.50	1,830	336.40	780	367.20
90-94 .....	8,870	381.50	8,460	385.20	360	296.80	50	372.80
95 or older.....	480	380.10	450	380.70	30	371.30	...	...
<b>Wives of retired workers.....</b>	2,210,970	412.10	2,054,620	418.40	92,110	341.10	58,030	309.00
<b>Wives of disabled workers.....</b>	43,340	269.70	36,780	271.00	3,960	261.90	2,480	266.80
<b>Husbands.....</b>	10,350	217.10	7,470	220.70	1,510	216.50	1,360	198.40
<b>Nondisabled widows <sup>3</sup> and widowers</b>								
<b>Total .....</b>	2,734,480	\$739.60	2,387,950	\$757.90	283,600	\$614.10	56,250	\$600.90
60-64 .....	464,270	766.60	392,680	789.30	55,790	648.70	14,930	614.50
60 .....	55,540	775.20	46,790	793.70	7,160	681.20	1,560	657.60
61 .....	79,910	755.80	67,240	779.80	9,750	639.90	2,860	586.90
62 .....	99,850	764.30	84,760	787.30	11,730	642.60	3,220	601.80
63 .....	107,080	772.80	90,390	794.60	13,060	660.70	3,390	637.70
64 .....	121,890	766.20	103,500	790.60	14,090	632.30	3,900	607.80
65-69 .....	573,360	784.70	490,450	807.90	67,380	651.00	14,020	623.90
65 .....	121,780	786.00	103,240	810.70	14,980	653.40	3,320	625.10
66 .....	116,600	791.40	99,840	813.10	13,630	669.50	2,850	625.00
67 .....	110,940	786.40	94,990	810.40	13,070	647.60	2,570	613.60
68 .....	112,640	781.20	96,240	805.40	13,140	640.20	2,900	622.20
69 .....	111,400	778.40	96,140	799.70	12,560	643.20	2,380	634.30
70-74 .....	543,590	761.10	472,220	781.90	58,980	624.40	10,600	608.00
70 .....	110,040	775.20	95,240	796.60	12,100	642.50	2,290	608.20
71 .....	105,800	769.50	91,150	793.20	11,990	621.80	2,260	602.00
72 .....	107,140	763.40	93,490	783.90	11,440	631.00	1,900	571.50
73 .....	110,730	754.40	96,730	773.90	11,570	617.80	2,150	620.10
74 .....	109,880	743.50	95,610	762.60	11,880	608.80	2,000	636.10
75-79 .....	512,120	725.80	453,640	743.60	48,830	585.20	8,340	580.00
75 .....	106,590	738.40	93,790	756.80	10,650	603.70	1,880	591.20
76 .....	106,690	726.80	94,250	746.20	10,220	574.60	1,960	587.90
77 .....	101,990	724.30	90,320	741.50	9,870	590.90	1,470	560.30
78 .....	98,950	719.30	87,550	737.60	9,610	577.90	1,550	560.10
79 .....	97,900	718.90	87,730	734.90	8,480	576.30	1,480	595.70
80-84 .....	338,260	697.50	303,940	712.00	28,730	564.80	4,780	567.10
85-89 .....	192,380	643.60	174,190	656.40	15,410	518.10	2,510	524.20
90-94 .....	85,100	647.50	77,760	658.80	6,390	529.80	840	519.80
95 or older.....	25,400	639.80	23,070	650.40	2,090	531.10	230	576.70

<sup>1</sup> For a description of the race data, see footnotes 1 and 3 in table 5.A1.

<sup>2</sup> Includes persons of unknown race.

<sup>3</sup> For data on widows with benefits limited due to early retirement of spouse, see table 5.F13.

Contact: Rona Blumenthal/Joseph Bondar (410) 965-0163/0162 for further information.

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

Table 5.A4.—Number and total monthly benefit, 1940–2000<sup>1</sup>

December	Total			Retired workers	Disabled workers	Wives and husbands	Children	Widowed mothers and fathers	Widows and widowers	Parents	Special age-72 beneficiaries
	Total	OASI trust fund	DI trust fund								
Number											
1940	222,488	222,488	...	112,331	...	29,749	54,648	20,499	4,437	824	...
1945	1,288,107	1,288,107	...	518,234	...	159,168	390,134	120,581	93,781	6,209	...
1950	3,477,243	3,477,243	...	1,770,984	...	508,350	699,703	169,438	314,189	14,579	...
1955	7,960,616	7,960,616	...	4,473,971	...	1,191,963	1,276,240	291,916	701,360	25,166	...
1957	11,128,897	10,979,047	149,850	6,197,532	149,850	1,827,048	1,502,077	328,309	1,095,137	28,944	...
1960	14,844,589	14,157,138	687,451	8,061,469	455,371	2,345,983	2,000,451	401,358	1,543,843	36,114	...
1965	20,866,767	19,127,716	1,739,051	11,100,584	988,074	2,806,912	3,092,659	471,816	2,371,433	35,289	...
1966	22,767,252	20,796,930	1,970,322	11,658,443	1,097,190	2,860,026	3,392,970	487,755	2,602,015	34,540	634,313
1970	26,228,629	23,563,634	2,664,995	13,349,175	1,492,948	2,951,552	4,122,305	523,136	3,227,160	28,729	533,624
1975	32,084,511	27,732,311	4,352,200	16,588,001	2,488,774	3,320,310	4,972,008	581,845	3,888,705	21,444	223,424
1980	35,584,955	30,906,511	4,678,444	19,562,085	2,858,680	3,477,427	4,606,517	562,316	4,410,515	14,779	92,636
1981	36,006,371	31,550,097	4,456,274	20,195,362	2,776,519	3,459,027	4,429,979	547,593	4,507,941	13,627	76,323
1982	35,839,338	31,866,077	3,973,261	20,763,230	2,603,599	3,405,170	3,882,511	514,772	4,594,961	12,483	62,612
1983	36,084,748	32,271,757	3,812,991	21,418,747	2,569,029	3,347,237	3,593,377	400,298	4,693,791	11,422	50,847
1984	36,478,683	32,656,902	3,821,781	21,906,461	2,596,516	3,354,799	3,408,457	382,411	4,779,190	10,452	40,397
1985	37,058,317	33,151,003	3,907,314	22,431,930	2,656,638	3,374,599	3,319,490	371,659	4,862,805	9,541	31,655
1986	37,702,976	33,707,103	3,995,873	22,980,948	2,728,463	3,386,917	3,294,587	350,546	4,928,019	8,726	24,770
1987	38,189,919	34,145,244	4,044,675	23,439,684	2,785,859	3,380,856	3,243,939	328,838	4,983,846	7,890	19,007
1988	38,627,019	34,552,719	4,074,300	23,858,226	2,830,284	3,366,843	3,203,822	317,761	5,028,822	7,145	14,116
1989	39,151,370	35,022,543	4,128,827	24,326,604	2,895,364	3,364,563	3,165,113	312,079	5,070,873	6,484	10,290
1990	39,832,125	35,566,144	4,265,981	24,838,100	3,011,294	3,366,975	3,187,010	303,923	5,111,482	5,908	7,433
1991	40,592,173	36,079,133	4,513,040	25,288,719	3,194,938	3,370,454	3,268,252	300,661	5,158,383	5,467	5,299
1992	41,507,188	36,617,492	4,889,696	25,757,727	3,467,783	3,382,189	3,391,173	294,176	5,205,375	5,083	3,682
1993	42,245,719	36,992,153	5,253,566	26,104,305	3,725,966	3,367,206	3,527,483	289,350	5,224,279	4,673	2,457
1994	42,883,470	37,299,951	5,583,519	26,407,756	3,962,954	3,337,484	3,653,887	283,072	5,232,379	4,318	1,620
1995	43,387,259	37,529,603	5,857,656	26,672,806	4,185,263	3,289,551	3,734,097	275,020	5,225,519	3,976	1,027
1996	43,736,836	37,664,802	6,072,034	26,898,072	4,385,623	3,194,080	3,802,791	242,135	5,209,812	3,670	653
1997	43,971,086	37,818,047	6,153,039	27,274,572	4,508,134	3,129,129	3,771,774	230,222	5,053,442	3,419	394
1998	44,245,731	37,911,161	6,334,570	27,510,535	4,698,319	3,054,073	3,768,928	220,610	4,989,855	3,186	225
1999	44,595,624	38,071,894	6,523,730	27,774,677	4,879,455	2,987,307	3,794,915	212,401	4,943,915	2,931	143
2000	45,414,794	38,741,432	6,673,362	28,498,945	5,042,334	2,963,326	3,802,863	203,052	4,901,437	2,748	89
Monthly benefit (in thousands)											
1940	\$4.070	\$4.070	...	\$2.539	...	\$361	\$668	\$402	\$90	\$11	...
1945	23,801	23,801	...	12,538	...	2,040	4,858	2,391	1,893	81	...
1950	126,857	126,857	...	77,678	...	11,995	19,366	5,801	11,481	535	...
1955	411,613	411,613	...	276,942	...	39,416	46,444	13,403	34,152	1,256	...
1957	605,455	594,552	\$10,904	400,250	\$10,904	62,802	57,952	16,102	55,944	1,501	...
1960	936,321	888,320	48,000	596,849	40,668	90,503	93,275	23,795	89,054	2,178	...
1965	1,516,802	1,395,817	120,986	931,532	96,599	120,796	159,428	30,882	174,883	2,683	...
1966	1,638,548	1,502,863	135,685	983,338	107,627	123,262	175,100	31,983	192,821	2,642	\$21,777
1970	2,628,326	2,385,926	242,400	1,576,551	196,010	175,323	279,845	45,258	328,245	2,965	24,128
1975	5,727,758	5,047,656	680,102	3,436,752	562,180	332,159	544,048	85,676	747,903	3,685	15,354
1980	10,682,791	9,422,206	1,260,585	6,678,216	1,059,792	569,528	864,242	138,426	1,358,836	4,080	9,672
1981	12,255,310	10,901,677	1,353,632	7,794,868	1,147,113	642,347	946,273	151,509	1,560,102	4,230	8,868
1982	13,320,480	11,997,646	1,322,835	8,705,109	1,147,131	693,100	882,875	155,876	1,724,392	4,186	7,811
1983	14,173,415	12,834,821	1,338,594	9,440,689	1,171,957	725,618	856,218	123,559	1,844,798	3,996	6,579
1984	15,025,627	13,636,147	1,389,480	10,089,401	1,222,081	760,944	847,825	122,957	1,973,203	3,804	5,413
1985	15,901,579	14,441,682	1,459,896	10,736,304	1,285,375	796,351	858,006	123,557	2,094,003	3,609	4,373
1986	16,534,384	15,027,053	1,507,331	11,225,159	1,331,144	816,351	860,953	118,602	2,175,345	3,371	3,459
1987	17,612,946	16,016,257	1,596,689	12,016,444	1,415,811	856,263	883,739	115,966	2,318,748	3,213	2,763
1988	18,691,340	17,008,453	1,682,887	12,806,481	1,498,637	893,521	908,660	116,902	2,461,948	3,061	2,132
1989	20,037,582	18,237,927	1,799,655	13,789,570	1,609,780	944,429	938,538	120,970	2,629,728	2,941	1,627
1990	21,686,763	19,716,655	1,970,108	14,966,531	1,768,313	1,004,852	991,628	124,340	2,827,012	2,849	1,238
1991	23,076,535	20,912,298	2,164,237	15,914,665	1,946,823	1,049,463	1,045,006	127,510	2,989,385	2,767	915
1992	24,442,156	22,033,164	2,408,992	16,810,432	2,171,080	1,089,504	1,100,812	128,748	3,138,250	2,676	655
1993	25,662,445	23,011,870	2,650,575	17,595,964	2,390,829	1,117,643	1,160,403	129,752	3,264,849	2,557	448
1994	26,936,223	24,032,186	2,904,037	18,415,099	2,620,982	1,144,466	1,226,468	131,463	3,394,982	2,459	303
1995	28,148,078	24,993,131	3,154,947	19,199,157	2,853,365	1,164,029	1,283,288	131,430	3,514,262	2,349	197
1996	29,426,079	26,017,474	3,408,605	20,038,023	3,087,223	1,177,458	1,356,685	124,678	3,639,632	2,252	129
1997	30,463,716	26,884,933	3,578,782	20,864,462	3,252,919	1,185,143	1,389,552	122,488	3,646,898	2,173	79
1998	31,298,873	27,519,891	3,778,982	21,449,654	3,444,259	1,179,882	1,417,362	120,247	3,685,349	2,074	46
1999	32,578,327	28,548,030	4,030,297	22,339,070	3,679,691	1,188,814	1,473,988	120,157	3,774,601	1,975	30
2000	34,848,920	30,517,277	4,331,642	24,066,918	3,965,304	1,233,598	1,547,808	120,812	3,912,527	1,934	19

<sup>1</sup> Provisions for Railroad Retirement beneficiaries are described in the section Social Security (Old-Age, Survivors, and Disability Insurance).

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

Table 5.A5.—Number and average age, by type of benefit, December 2000

[Based on 10-percent sample]

Type of benefit	Number <sup>1</sup> (in thousands)	Average age
Total .....	45,417	...
OASI .....	38,742	...
Retired workers .....	28,506	74
Spouses .....	2,797	72
Children of retired workers .....	458	24
Under age 18 .....	255	13
Disabled, aged 18 or older .....	192	40
Students, aged 18–19 .....	11	18
Children of deceased workers .....	1,878	21
Under age 18 .....	1,343	12
Disabled, aged 18 or older .....	484	47
Students, aged 18–19 .....	51	18
Nondisabled widows and widowers .....	4,699	77
Widowed mothers and fathers .....	201	43
Disabled widows and widowers .....	200	59
Parents of deceased workers .....	3	82
DI .....	6,675	...
Disabled workers .....	5,036	51
Spouses .....	165	48
Children .....	1,475	12
Under age 18 .....	1,382	11
Disabled, aged 18 or older .....	58	27
Students, aged 18–19 .....	35	18

<sup>1</sup> Provisions for Railroad Retirement beneficiaries are described in the section Social Security (Old-Age, Survivors, and Disability Insurance).

Table 5.A6.—Number and average monthly benefit, by type of benefit and race,<sup>1</sup> December 2000

[Based on 10-percent sample]

Type of benefit	Total <sup>2</sup>	White	Black	Other
	Number <sup>3</sup> (in thousands)			
Total .....	45,417	38,853	4,622	1,769
Men .....	17,717	15,416	1,572	671
Women .....	23,890	20,847	2,222	740
Children .....	3,810	2,590	828	358
Under age 18 .....	2,980	1,938	680	329
Disabled, aged 18 or older .....	734	584	126	22
Students, aged 18–19 .....	97	68	21	7
Retired workers and their spouses and children .....	31,761	28,301	2,509	859
Retired workers .....	28,506	25,401	2,283	749
Wives and husbands .....	2,797	2,561	135	83
Children .....	458	339	91	27
Disabled workers and their spouses and children .....	6,676	4,707	1,198	448
Disabled workers .....	5,036	3,702	868	427
Wives and husbands .....	165	125	21	18
Children .....	1,475	980	309	173
Survivors of deceased workers .....	6,786	5,604	875	274
Widows and widowers .....	4,699	4,182	412	92
Widowed mothers and fathers .....	201	142	34	23
Children .....	1,878	1,270	428	159
Parents .....	3	2	(4)	(4)
	Average monthly benefit			
Retired workers .....	\$844.60	\$859.90	\$724.20	\$697.40
Men .....	951.50	970.90	795.10	752.60
Women .....	729.60	739.30	659.20	626.50
Disabled workers .....	787.00	809.30	731.40	709.90
Men .....	883.00	915.30	790.90	784.50
Women .....	661.10	666.10	662.40	615.00
Widowed mothers and fathers .....	593.00	633.10	508.40	469.60
Nondisabled widows and widows .....	810.20	829.90	646.00	644.50
Surviving children .....	548.70	589.50	464.90	448.30

<sup>1</sup> For a description of the race data, see footnotes 1 and 3 in table 5.A1.

<sup>2</sup> Includes persons of unknown race.

<sup>3</sup> Provisions for Railroad Retirement beneficiaries are described in the section Social Security (Old-Age, Survivors, and Disability Insurance).

<sup>4</sup> Fewer than 500 beneficiaries.

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

Table 5.A7.—Number and average monthly benefit for **women**, by type of benefit and race, <sup>1</sup> December 2000

[Numbers in thousands. Based on 10-percent sample]

Type of benefit	Total <sup>2</sup>		White		Black		Other	
	Number	Average monthly benefit	Number	Average monthly benefit	Number	Average monthly benefit	Number	Average monthly benefit
All women								
Total <sup>3</sup> .....	23,890	\$698.60	20,847	\$710.50	2,222	\$629.60	740	\$572.50
Workers.....	15,913	720.20	13,749	730.90	1,592	660.00	516	622.30
Retired.....	13,734	729.60	12,175	739.30	1,190	659.20	328	626.50
Full benefit.....	3,489	843.50	2,982	861.30	385	739.80	108	722.90
Reduced benefit.....	10,245	690.80	9,193	699.70	805	620.60	220	579.10
Disabled.....	2,179	661.10	1,574	666.10	402	662.40	188	615.00
Wives of retired and disabled workers.....	2,926	419.20	2,662	429.30	151	330.30	103	289.60
Entitlement based on care of children.....	167	220.80	124	235.20	23	197.90	19	156.30
Husband retired.....	56	330.40	43	347.20	8	298.80	4	222.80
Husband disabled.....	111	165.90	80	174.70	16	148.80	14	135.80
Entitlement based on age.....	2,759	431.10	2,539	438.80	128	354.30	84	319.30
Husband retired.....	2,710	433.90	2,497	441.50	123	357.30	82	321.10
Full benefit.....	496	531.90	440	550.10	30	407.00	23	352.20
Reduced benefit.....	2,214	412.00	2,057	418.30	92	341.10	58	308.70
Husband disabled.....	50	277.90	42	278.50	5	278.50	3	269.00
Widows.....	5,048	792.60	4,434	816.10	479	622.50	120	601.40
Entitlement based on care of children.....	191	598.20	135	639.70	32	508.80	22	472.10
Nondisabled, aged 60 or older.....	4,622	811.80	4,153	831.40	406	646.90	90	646.60
Disabled, aged 50–64.....	195	523.00	146	542.70	40	465.90	9	453.30
Women aged 65 or older								
Total <sup>4</sup> .....	19,150	\$719.40	17,106	\$730.10	1,550	\$638.30	434	\$591.70
Entitled as worker.....	12,511	741.80	11,096	752.00	1,086	663.90	288	640.70
Worker only.....	6,979	714.40	5,985	728.40	757	633.10	215	619.80
Dually entitled.....	5,532	776.20	5,111	779.80	329	735.00	73	702.10
Wife's benefit.....	2,229	504.60	2,108	507.10	81	450.50	33	480.10
Widow's benefit.....	3,306	959.30	3,006	971.00	248	827.80	40	882.30
Entitled as wife or widow only.....	6,639	677.40	6,010	689.50	463	578.10	146	495.00
Wife's benefit.....	2,422	436.50	2,234	443.90	110	359.70	70	325.20
Widow's benefit.....	4,216	815.80	3,776	834.90	353	646.10	76	652.00

<sup>1</sup> For a description of the race data, see footnotes 1 and 3 in table 5.A1.

<sup>2</sup> Includes persons of unknown race.

<sup>3</sup> Includes special-age 72 beneficiaries and parents, excludes adults receiving benefits because of childhood disability.

<sup>4</sup> Excludes parents, special age-72 beneficiaries, and adults receiving benefits because of childhood disability.

Table 5.A8.—Number and average primary insurance amount and average monthly benefit for persons with benefits based on **special minimum primary insurance amount**, by type of benefit, December 2000

Type of benefit	Number of beneficiaries	Average primary insurance amount	Average monthly benefit
Total.....	141,516	\$521.31	\$583.49
Retired workers.....	127,183	518.66	607.19
Men.....	29,309	504.88	447.37
Women.....	97,874	522.78	655.05
Wives and husbands of retired workers.....	4,362	506.46	206.36
Children of retired workers.....	595	517.32	206.01
Disabled workers.....	14	506.36	502.71
Wives and husbands of disabled workers.....	3	600.90	199.33
Children of disabled workers.....	3	600.90	199.33
Nondisabled widows and widowers.....	7,813	564.14	475.36
Disabled widows and widowers.....	252	564.85	359.96
Widowed mothers and fathers.....	56	559.00	361.91
Children of deceased workers.....	1,238	566.85	398.22

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

Table 5.A10.—Number and average monthly benefit for beneficiaries aged 60 or older, by type of benefit, age, and sex, December 2000

[Based on 10-percent sample]

Type of benefit	Total <sup>1</sup>	Age attained during 2000								
		60-61	62-64	65-69	70-74	75-79	80-84	85-89	90-94	95 or older <sup>2</sup>
Number (in thousands)										
Total .....	37,341	645	3,984	8,786	8,211	6,977	4,704	2,662	1,066	306
Retired workers <sup>3</sup> .....	28,506	...	2,553	7,285	6,636	5,473	3,623	1,985	752	200
Widows, widowers, parents, and mothers and fathers .....	4,809	181	389	701	814	945	803	579	295	104
Wives and husbands .....	2,807	6	346	776	742	548	273	96	19	2
Disabled workers .....	1,119	442	676	...	...	...	...	...	...	...
Disabled children <sup>4</sup> .....	99	16	20	25	19	12	6	2	(5)	(5)
Men .....	15,543	271	1,750	4,103	3,653	2,870	1,742	834	265	56
Retired workers <sup>3</sup> .....	14,772	...	1,330	4,076	3,631	2,855	1,734	828	262	56
Widowers, parents, and fathers .....	40	8	11	7	4	3	2	2	1	(5)
Husbands .....	34	(5)	2	8	10	7	4	3	1	(5)
Disabled workers .....	651	254	397	...	...	...	...	...	...	...
Disabled children <sup>4</sup> .....	47	8	10	12	9	4	2	1	(5)	...
Women .....	21,797	374	2,234	4,684	4,558	4,107	2,962	1,828	801	249
Retired workers <sup>3</sup> .....	13,734	...	1,223	3,209	3,005	2,618	1,889	1,157	489	144
Widows, parents, and mothers .....	4,770	172	378	694	810	941	800	577	294	104
Wives .....	2,773	6	345	768	732	540	269	93	18	2
Disabled workers .....	468	189	280	...	...	...	...	...	...	...
Disabled children <sup>4</sup> .....	53	7	9	13	10	7	4	1	(5)	(5)
Average monthly benefit										
Total .....	\$807.50	\$801.80	\$744.60	\$797.30	\$801.40	\$803.20	\$851.30	\$886.30	\$827.70	\$766.30
Retired workers <sup>3</sup> .....	844.60	...	766.10	836.20	842.20	839.70	884.00	927.70	855.50	787.30
Widows, widowers, parents, and mothers and fathers .....	803.90	705.40	732.00	812.60	814.20	812.60	841.10	816.40	780.90	732.00
Wives and husbands .....	428.50	345.70	391.20	427.90	430.80	429.80	456.10	463.70	455.50	419.20
Disabled workers .....	857.30	856.30	857.90	...	...	...	...	...	...	...
Disabled children <sup>4</sup> .....	500.80	549.60	528.30	505.40	480.40	458.90	443.70	406.10	(5)	(5)
Men .....	950.00	978.90	929.90	961.10	952.00	924.00	950.70	1,021.30	922.80	864.00
Retired workers <sup>3</sup> .....	951.50	...	913.70	964.40	955.30	927.00	953.40	1,025.80	927.10	867.20
Widowers, parents, and fathers .....	593.20	549.10	630.30	668.80	622.70	537.90	536.70	494.50	487.90	(5)
Husbands .....	238.50	(5)	189.60	235.80	241.80	230.40	241.70	268.40	281.90	(5)
Disabled workers .....	1,006.50	1,007.20	1,006.10	...	...	...	...	...	...	...
Disabled children <sup>4</sup> .....	504.40	549.60	529.60	503.60	478.70	460.60	432.50	412.60	(5)	...
Women .....	706.00	673.80	599.40	653.80	680.70	718.80	792.90	824.70	796.30	744.30
Retired workers <sup>3</sup> .....	729.60	...	605.50	673.30	705.50	744.60	820.30	857.40	817.10	756.30
Widows, parents, and mothers .....	805.60	712.90	734.90	814.10	815.10	813.60	842.00	817.70	782.00	732.70
Wives .....	430.80	347.10	392.20	429.80	433.20	432.60	459.10	469.50	464.60	433.60
Disabled workers .....	649.70	653.00	647.50	...	...	...	...	...	...	...
Disabled children <sup>4</sup> .....	497.60	549.50	526.90	507.20	481.80	457.90	450.20	403.00	(5)	(5)

<sup>1</sup> The sum of the individual categories may not equal total because of independent rounding.

<sup>2</sup> Includes 39,480 persons aged 100 or older, 5,590 men and 33,890 women.

<sup>3</sup> Includes special age-72 beneficiaries.

<sup>4</sup> Includes adults receiving benefits because of childhood disability.

<sup>5</sup> Fewer than 500 beneficiaries.

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

Table 5.A14.—Number and percentage distribution of women aged 62 or older, by type of benefit and dual entitlement status, December 1960–2000

Type of benefit	1960	1970	1975	1980	1985	1990	1995	1999	2000
Number (in thousands)									
Total <sup>1</sup> .....	6,619	11,374	14,010	16,350	18,412	19,954	20,888	21,147	21,381
Entitled as worker <sup>2</sup> .....	2,866	5,753	7,586	9,304	10,805	12,037	12,974	13,719	14,013
Worker only .....	2,563	4,786	5,926	6,710	7,096	7,359	7,554	7,947	8,117
Dually entitled <sup>3</sup> .....	303	967	1,660	2,594	3,709	4,678	<sup>4</sup> 5,420	<sup>4</sup> 5,772	<sup>4</sup> 5,896
Wife's benefit .....	159	388	617	1,016	1,594	2,077	<sup>4</sup> 2,398	<sup>4</sup> 2,499	<sup>4</sup> 2,568
Widow's benefit .....	141	574	1,039	1,575	2,112	2,600	<sup>4</sup> 3,022	<sup>4</sup> 3,272	<sup>4</sup> 3,327
Entitled as wife or widow only <sup>3</sup> .....	3,753	5,621	6,424	7,046	7,607	7,917	7,914	7,429	7,368
Wife's benefit .....	2,174	2,546	2,745	2,884	3,018	3,059	2,985	2,784	2,768
Widow's benefit <sup>5</sup> .....	1,546	3,048	3,659	4,148	4,580	4,853	4,926	4,642	4,598
Percentage distribution									
Total <sup>1</sup> .....	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0
Entitled as worker <sup>2</sup> .....	43.3	50.6	54.1	56.9	58.7	60.3	62.1	64.9	65.5
Worker only .....	38.7	42.1	42.3	41.0	38.5	36.9	36.2	37.6	38.0
Dually entitled <sup>3</sup> .....	4.6	8.5	11.8	15.9	20.1	23.4	<sup>4</sup> 25.9	<sup>4</sup> 27.3	<sup>4</sup> 27.6
Wife's benefit .....	2.4	3.4	4.4	6.2	8.7	10.4	<sup>4</sup> 11.5	<sup>4</sup> 11.8	<sup>4</sup> 12.0
Widow's benefit .....	2.1	5.0	7.4	9.6	11.5	13.0	<sup>4</sup> 14.4	<sup>4</sup> 15.5	<sup>4</sup> 15.6
Entitled as wife or widow only <sup>3</sup> .....	56.7	49.4	45.9	43.1	41.3	39.7	37.9	35.1	34.5
Wife's benefit .....	32.8	22.4	19.6	17.6	16.4	15.3	14.3	13.2	12.9
Widow's benefit <sup>5</sup> .....	23.4	26.8	26.1	25.4	24.9	24.3	23.6	22.0	21.5

<sup>1</sup> Excludes special age-72 beneficiaries and adults receiving benefits because of childhood disability.

<sup>2</sup> Includes disabled workers.

<sup>3</sup> Includes parents.

<sup>4</sup> Based on 10-percent sample.

<sup>5</sup> Includes disabled widows and mothers.

Table 5.A15.—Number and average monthly benefit for women aged 65 or older, by age, type of benefit, and dual entitlement status, December 2000

[Based on 10-percent sample]

Type of benefit	Total	65–69	70–74	75–79	80–84	85–89	90 or older
Number							
Total <sup>1</sup> .....	19,150,040	4,670,020	4,547,350	4,099,010	2,957,920	1,826,420	1,049,320
Entitled as worker .....	12,511,220	3,208,920	3,005,050	2,618,000	1,889,000	1,157,070	633,180
Worker only .....	6,976,300	2,104,860	1,726,480	1,329,530	892,650	589,260	333,520
Dually entitled .....	5,534,920	1,104,060	1,278,570	1,288,470	996,350	567,810	299,660
Wife's benefit .....	2,228,840	795,400	692,720	469,590	206,840	54,800	9,490
Widow's benefit .....	3,306,080	308,660	585,850	818,880	789,510	513,010	290,170
Entitled as wife or widow only .....	6,638,820	1,461,100	1,542,300	1,481,010	1,068,920	669,350	416,140
Wife's benefit .....	2,422,450	767,870	732,410	540,440	269,220	93,320	19,190
Widow's benefit .....	4,216,370	693,230	809,890	940,570	799,700	576,030	396,950
Average monthly benefit							
Total <sup>1</sup> .....	\$719.40	\$654.20	\$681.20	\$719.30	\$793.30	\$825.10	\$784.20
Entitled as worker .....	741.70	673.30	705.50	744.60	820.30	857.40	803.30
Worker only .....	714.40	691.30	696.80	696.10	748.50	813.60	758.30
Dually entitled .....	776.20	639.10	717.20	794.60	884.50	902.90	853.50
Wife's benefit .....	504.60	511.60	500.60	491.70	512.10	534.10	527.30
Widow's benefit .....	959.30	967.90	973.40	968.20	982.10	942.30	864.20
Entitled as wife or widow only .....	677.40	612.20	633.80	674.60	745.60	769.20	755.20
Wife's benefit .....	436.50	429.80	433.20	432.60	459.10	469.50	462.00
Widow's benefit .....	815.80	814.30	815.10	813.70	842.00	817.80	769.30

<sup>1</sup> Excludes parents, special age-72 beneficiaries, and adults receiving benefits because of childhood disability.

5.A OASDI Current-Pay Benefits: Summary

Table 5.A16.—Number and average monthly benefit for adult beneficiaries, by type of benefit, sex, and age, December 2000

Type of benefit and sex	Number of beneficiaries (in thousands)				Average monthly benefit			
	Total	Under 62	62-64	65 or older	Total	Under 62	62-64	65 or older
Total <sup>1</sup> .....	42,341	5,645	3,973	32,722	\$795.43	\$717.25	\$744.35	\$815.11
Retired workers.....	28,499	...	2,545	25,954	844.48	...	765.67	852.21
Disabled workers .....	5,042	4,363	679	...	786.40	775.50	856.43	...
Wives and husbands of retired workers.....	2,798	48	314	2,436	429.14	321.79	401.38	434.86
Wives and husbands of disabled workers.....	165	113	30	23	198.42	164.53	269.50	273.95
Nondisabled widows and widowers .....	4,700	134	324	4,242	810.18	764.75	772.10	814.52
Disabled widows and widowers .....	201	145	56	...	519.66	520.99	516.25	...
Mothers and fathers.....	203	197	6	1	594.98	593.68	641.77	592.77
Disabled children, aged 18 or older .....	729	646	19	64	518.26	521.69	529.73	479.95
Men <sup>1</sup> .....	18,111	2,843	1,749	13,519	928.13	815.79	929.60	951.56
Retired workers.....	14,767	...	1,329	13,439	951.05	...	913.13	954.80
Disabled workers .....	2,856	2,458	398	...	882.66	862.73	1,005.81	...
Husbands of retired workers.....	32	(2)	1	31	242.74	(2)	208.41	244.03
Husbands of disabled workers.....	4	2	(2)	1	155.86	125.84	(2)	196.04
Nondisabled widowers .....	37	7	10	20	606.86	573.94	660.14	591.87
Disabled widowers.....	5	4	1	...	361.68	364.86	349.37	...
Fathers.....	10	10	(2)	(2)	502.76	502.76	(2)	(2)
Disabled children, aged 18 or older .....	399	361	10	28	515.83	518.54	524.24	477.50
Women <sup>1</sup> .....	24,230	2,803	2,225	19,203	696.24	617.31	598.71	719.05
Retired workers.....	13,732	...	1,217	12,515	729.89	...	604.66	742.06
Disabled workers .....	2,186	1,905	281	...	660.61	662.92	645.02	...
Wives of retired workers .....	2,766	48	313	2,405	431.32	321.91	402.07	437.33
Wives of disabled workers .....	161	111	29	21	199.48	165.26	271.14	279.35
Nondisabled widows .....	4,663	127	314	4,222	811.78	775.29	775.64	815.57
Disabled widows .....	196	141	55	...	523.83	525.55	519.45	...
Mothers.....	193	187	5	1	599.67	598.39	644.12	596.19
Disabled children, aged 18 or older .....	330	284	10	36	521.19	525.69	535.24	481.84

<sup>1</sup> Includes parents and special age-72 beneficiaries. Excludes 97,768 student beneficiaries aged 18-19.

<sup>2</sup> Fewer than 500 beneficiaries.

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

Table 5.A17.—Number and average benefit for disabled beneficiaries, by type of benefit, 1957–2000

December	Total	Number of—			Average monthly benefit of—		
		Workers	Children, aged 18 or older	Widows and widowers	Workers	Children, aged 18 or older	Widows and widowers
1957.....	178,719	149,850	28,869	...	\$72.76	\$38.62	...
1958.....	284,744	237,719	47,025	...	82.10	39.62	...
1959.....	416,896	334,443	82,453	...	89.00	42.96	...
1960.....	559,425	455,371	104,054	...	89.31	44.15	...
1961.....	742,296	618,075	124,221	...	89.59	45.28	...
1962.....	888,131	740,867	147,264	...	89.99	45.67	...
1963.....	993,656	827,014	166,642	...	90.59	46.45	...
1964.....	1,077,695	894,173	183,522	...	91.12	47.35	...
1965.....	1,186,464	988,074	198,390	...	97.76	51.77	...
1966.....	1,310,911	1,097,190	213,721	...	98.09	52.42	...
1967.....	1,422,778	1,193,120	229,658	...	98.43	53.41	...
1968.....	1,560,517	1,295,300	243,654	21,563	111.86	61.83	\$72.25
1969.....	1,690,982	1,394,291	257,222	39,469	112.74	62.79	71.02
1970.....	1,812,786	1,492,948	270,557	49,281	131.26	73.21	82.00
1971.....	1,990,098	1,647,684	285,671	56,743	146.52	81.37	90.11
1972.....	2,202,090	1,832,916	305,007	64,167	179.32	98.81	109.54
1973.....	2,415,383	2,016,626	319,988	78,769	183.00	100.14	111.14
1974.....	2,670,092	2,236,882	341,082	92,128	205.70	112.45	125.87
1975.....	2,960,620	2,488,774	362,335	109,511	225.90	122.80	137.70
1976.....	3,171,198	2,670,208	381,563	119,427	245.17	132.32	147.01
1977.....	3,368,954	2,837,432	404,246	127,276	265.30	142.12	156.11
1978.....	3,429,421	2,879,774	419,896	129,751	288.30	153.66	165.46
1979.....	3,435,761	2,870,590	435,338	129,833	322.00	171.55	180.52
1980.....	3,436,429	2,858,680	450,169	127,580	370.70	198.95	205.02
1981.....	3,361,130	2,776,519	463,021	121,590	413.20	224.51	226.58
1982.....	3,192,379	2,603,599	472,408	116,372	440.60	245.07	242.11
1983.....	3,168,992	2,569,029	488,372	111,591	456.20	257.78	250.33
1984.....	3,212,040	2,596,516	506,373	109,151	470.70	270.28	306.24
1985.....	3,289,485	2,656,638	525,842	107,005	483.80	281.92	315.26
1986.....	3,380,480	2,728,463	545,043	106,974	487.90	288.79	319.74
1987.....	3,453,414	2,785,859	561,273	106,282	508.20	304.32	333.89
1988.....	3,507,707	2,830,284	574,300	103,123	529.50	320.21	348.05
1989.....	3,583,451	2,895,364	586,457	101,630	556.00	339.47	366.72
1990.....	3,712,763	3,011,294	600,480	100,989	587.20	361.71	388.93
1991.....	3,925,472	3,194,938	616,045	114,489	609.40	378.86	406.96
1992.....	4,236,080	3,467,783	636,973	131,324	626.10	393.61	422.65
1993.....	4,529,466	3,725,966	656,485	147,015	641.70	407.20	434.20
1994.....	4,796,313	3,962,954	672,683	160,676	661.40	422.40	446.30
1995.....	5,044,388	4,185,263	686,101	173,024	681.80	437.30	458.30
1996.....	5,264,321	4,385,623	696,787	181,911	703.90	454.30	471.00
1997.....	5,400,781	4,508,134	704,709	187,938	721.60	468.60	480.40
1998.....	5,605,272	4,698,319	712,772	194,181	733.10	479.40	487.30
1999.....	5,798,776	4,879,455	720,526	198,795	754.10	495.60	499.90
2000.....	5,972,450	5,042,334	728,689	201,427	786.40	518.30	519.70

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

Table 5.B1.—Number, average primary insurance amount, and average monthly benefit without reduction for early retirement and **with delayed retirement credit**, by age and sex, December 2000

[Based on 10-percent sample]

Age	Total			Men			Women		
	Number	Average		Number	Average		Number	Average	
		Primary insurance amount	Monthly benefit		Primary insurance amount	Monthly benefit		Primary insurance amount	Monthly benefit
Total .....	4,206,030	\$1,073.60	\$1,156.00	2,630,730	\$1,187.70	\$1,261.20	1,575,300	\$883.00	\$980.40
66-69 .....	795,740	1,085.90	1,152.60	524,260	1,201.80	1,270.00	271,480	862.10	925.90
66 .....	183,840	1,106.40	1,137.10	123,900	1,215.50	1,243.30	59,940	880.90	917.50
67 .....	197,520	1,086.90	1,147.20	131,140	1,202.00	1,263.40	66,380	859.50	917.70
68 .....	203,520	1,093.00	1,170.30	133,320	1,210.20	1,291.40	70,200	870.40	940.10
69 .....	210,860	1,060.30	1,154.20	135,900	1,180.90	1,279.80	74,960	841.50	926.40
70-74 .....	1,101,310	1,043.10	1,142.00	688,070	1,170.10	1,266.90	413,240	831.70	934.10
70 .....	225,710	1,036.10	1,136.60	140,720	1,168.20	1,271.20	84,990	817.40	913.70
71 .....	219,870	1,024.40	1,131.90	135,380	1,153.70	1,262.10	84,490	817.10	923.30
72 .....	219,650	1,049.60	1,148.40	137,090	1,180.20	1,276.40	82,560	832.90	935.80
73 .....	218,110	1,059.90	1,159.50	136,960	1,185.40	1,281.60	81,150	848.30	953.30
74 .....	217,970	1,045.70	1,133.90	137,920	1,162.70	1,243.00	80,050	844.10	945.90
75-79 .....	976,440	1,026.30	1,118.50	622,830	1,134.20	1,212.00	353,610	836.20	953.90
75 .....	194,640	1,068.10	1,165.80	122,660	1,188.40	1,279.00	71,980	863.10	973.10
76 .....	211,190	1,036.90	1,122.20	134,660	1,149.20	1,220.90	76,530	839.20	948.40
77 .....	199,370	1,016.60	1,106.60	127,670	1,121.80	1,195.90	71,700	829.30	947.60
78 .....	187,030	1,008.40	1,103.20	120,530	1,109.20	1,186.60	66,500	825.80	952.10
79 .....	184,210	998.50	1,092.90	117,310	1,099.50	1,175.50	66,900	821.40	947.80
80-84 .....	688,530	1,088.70	1,179.30	431,980	1,192.30	1,263.60	256,550	914.20	1,037.30
80 .....	172,060	988.00	1,085.20	110,070	1,083.80	1,159.80	61,990	817.80	952.70
81 .....	146,290	1,015.60	1,113.40	92,640	1,110.60	1,188.10	53,650	851.50	984.40
82 .....	135,920	1,076.50	1,178.10	83,550	1,184.10	1,265.70	52,370	904.80	1,038.30
83 .....	124,400	1,108.80	1,208.90	77,920	1,221.00	1,302.20	46,480	920.60	1,052.50
84 .....	109,860	1,336.20	1,382.30	67,800	1,457.30	1,488.20	42,060	1,140.90	1,211.50
85-89 .....	408,320	1,244.40	1,292.90	244,510	1,360.40	1,392.20	163,810	1,071.20	1,144.70
85 .....	101,920	1,312.80	1,357.70	62,990	1,433.40	1,464.10	38,930	1,117.70	1,185.50
86 .....	96,950	1,271.50	1,319.20	58,510	1,384.50	1,414.90	38,440	1,099.40	1,173.60
87 .....	82,600	1,236.60	1,285.70	49,230	1,352.60	1,383.80	33,370	1,065.50	1,141.10
88 .....	69,100	1,193.00	1,243.70	40,530	1,306.30	1,339.30	28,570	1,032.30	1,108.20
89 .....	57,750	1,150.90	1,203.30	33,250	1,257.50	1,292.80	24,500	1,006.30	1,081.90
90 or older .....	235,690	1,030.50	1,083.80	119,080	1,135.80	1,169.80	116,610	922.90	995.90

CONTACT: Joseph Bondar/Rona Blumenthal (410) 965-0162/0163 for further information.

**5.G OASDI Current-Pay Benefits: Retired Workers**

Table 5.B2.—Number, average primary insurance amount, and average monthly benefit without reduction for early retirement and **without delayed retirement credit**, by age and sex, December 2000

[Based on 10-percent sample]

Age	Total			Men			Women		
	Number	Average		Number	Average		Number	Average	
		Primary insurance amount	Monthly benefit		Primary insurance amount	Monthly benefit		Primary insurance amount	Monthly benefit
Total .....	3,980,260	\$798.10	\$852.80	2,066,940	\$965.10	\$965.80	1,913,320	\$617.60	\$730.70
65-69 .....	1,444,330	870.00	896.80	839,170	1,018.70	1,018.20	605,160	663.90	728.50
65 .....	440,150	961.70	975.30	271,660	1,104.30	1,103.70	168,490	731.70	768.30
66 .....	285,510	848.50	875.00	163,650	995.30	994.80	121,860	651.20	714.20
67 .....	252,660	831.40	861.60	144,220	976.90	976.30	108,440	637.80	709.10
68 .....	242,080	826.40	862.00	135,180	974.80	974.40	106,900	638.80	719.90
69 .....	223,930	808.10	847.70	124,460	958.50	958.40	99,470	620.00	709.20
70-74 .....	961,170	779.60	833.00	516,440	943.10	943.60	444,730	589.60	704.50
70 .....	214,720	794.20	839.00	117,620	947.70	948.00	97,100	608.10	706.90
71 .....	198,360	778.20	830.10	106,450	938.50	938.80	91,910	592.60	704.30
72 .....	194,620	779.50	832.80	102,910	947.90	948.30	91,710	590.50	703.30
73 .....	182,680	777.20	833.00	97,690	944.00	944.90	84,990	585.40	704.40
74 .....	170,790	765.60	829.10	91,770	936.40	937.20	79,020	567.20	703.50
75-79 .....	725,760	739.30	814.70	362,090	914.70	916.20	363,670	564.60	713.60
75 .....	165,820	769.00	834.30	86,080	945.90	947.30	79,740	578.10	712.30
76 .....	156,900	741.50	814.80	78,810	918.20	919.30	78,090	563.10	709.30
77 .....	142,600	727.50	804.70	70,540	900.70	902.20	72,060	558.10	709.20
78 .....	131,980	723.80	804.90	64,150	898.00	899.40	67,830	559.10	715.50
79 .....	128,460	727.10	810.50	62,510	900.10	902.40	65,950	563.10	723.30
80-84 .....	477,710	752.30	837.50	215,610	928.40	930.50	262,100	607.40	761.10
80 .....	116,160	712.40	799.90	55,210	883.60	886.10	60,950	557.30	721.80
81 .....	100,130	726.70	813.30	45,290	906.30	907.70	54,840	578.50	735.30
82 .....	97,130	753.00	838.30	43,760	922.10	924.10	53,370	614.30	767.90
83 .....	86,290	770.60	857.20	37,900	953.30	955.90	48,390	627.40	779.90
84 .....	78,000	823.40	902.00	33,450	1,012.40	1,014.00	44,550	681.50	817.90
85-89 .....	245,490	767.80	857.70	93,680	950.00	953.80	151,810	655.30	798.40
85 .....	69,650	800.50	887.80	28,050	986.90	990.80	41,600	674.80	818.30
86 .....	62,610	775.20	866.30	24,760	957.60	959.90	37,850	655.90	805.10
87 .....	49,110	761.40	857.20	18,010	949.80	952.50	31,100	652.40	802.10
88 .....	35,940	739.50	827.90	12,870	912.00	916.90	23,070	643.30	778.30
89 .....	28,180	717.50	802.80	9,990	876.80	884.40	18,190	630.10	758.10
90 or older .....	125,800	684.80	767.70	39,950	815.00	822.00	85,850	624.20	742.40

CONTACT: Joseph Bondar/Rona Blumenthal (410) 965-0162/0163 for further information.

5.B OASDI Current-Pay Benefits: Retired Workers

Table 5.B3.—Number and average monthly benefit **before and after delayed retirement credit**, by age and sex, December 2000

[Based on 1-percent sample]

Age	Total			Men			Women		
	Number	Average monthly benefit		Number	Average monthly benefit		Number	Average monthly benefit	
		Before delayed retirement credit	After delayed retirement credit		Before delayed retirement credit	After delayed retirement credit		Before delayed retirement credit	After delayed retirement credit
Total .....	4,910,000	\$1,106.30	\$1,126.20	2,977,500	\$1,212.80	\$1,234.90	1,932,500	\$942.10	\$958.80
66-69 .....	872,600	1,123.50	1,134.80	567,200	1,238.70	1,251.50	305,400	909.50	917.90
66 .....	181,700	1,134.00	1,138.70	123,800	1,238.40	1,243.60	57,900	910.70	914.30
67 .....	222,900	1,116.10	1,125.30	144,800	1,234.00	1,244.70	78,100	897.30	903.90
68 .....	227,100	1,131.90	1,145.20	146,300	1,249.40	1,264.60	80,800	919.10	928.90
69 .....	240,900	1,114.60	1,130.70	152,300	1,233.20	1,251.80	88,600	910.50	922.50
70-74 .....	1,291,400	1,094.00	1,113.40	793,300	1,216.80	1,238.40	498,100	898.20	914.10
70 .....	271,100	1,089.00	1,107.60	169,900	1,213.60	1,234.70	101,200	879.90	894.10
71 .....	254,800	1,090.70	1,110.40	155,300	1,214.30	1,236.30	99,500	897.90	913.80
72 .....	257,600	1,091.00	1,110.90	153,800	1,229.70	1,252.20	103,800	885.40	901.40
73 .....	257,300	1,117.20	1,137.30	160,700	1,242.10	1,264.40	96,600	909.40	925.80
74 .....	250,600	1,081.80	1,100.60	153,600	1,183.70	1,203.70	97,000	920.40	937.40
75-79 .....	1,147,300	1,060.40	1,081.70	703,500	1,156.80	1,180.10	443,800	907.70	925.80
75 .....	230,100	1,095.20	1,116.30	137,100	1,216.60	1,240.20	93,000	916.20	933.50
76 .....	250,400	1,069.20	1,089.90	155,000	1,172.00	1,194.90	95,400	902.00	919.30
77 .....	225,200	1,055.40	1,076.30	139,600	1,143.70	1,166.20	85,600	911.40	929.60
78 .....	220,900	1,050.90	1,073.60	138,000	1,129.40	1,153.90	82,900	920.30	939.90
79 .....	220,700	1,029.00	1,050.20	133,800	1,119.80	1,143.00	86,900	889.20	907.30
80-84 .....	813,200	1,124.10	1,147.20	488,100	1,214.60	1,239.90	325,100	988.40	1,008.00
80 .....	199,100	1,027.10	1,048.20	121,400	1,099.70	1,122.60	77,700	913.60	931.90
81 .....	175,000	1,080.10	1,102.90	110,500	1,155.70	1,180.60	64,500	950.60	969.70
82 .....	165,500	1,117.30	1,140.50	96,800	1,212.90	1,238.50	68,700	982.60	1,002.30
83 .....	143,400	1,145.50	1,167.50	83,300	1,253.30	1,277.50	60,100	996.00	1,015.10
84 .....	130,200	1,317.00	1,344.20	76,100	1,443.00	1,473.40	54,100	1,139.70	1,162.30
85-89 .....	501,300	1,227.80	1,254.00	287,800	1,335.30	1,364.90	213,500	1,082.80	1,104.40
85 .....	125,300	1,291.20	1,316.60	73,800	1,404.70	1,433.10	51,500	1,128.50	1,149.70
86 .....	118,500	1,258.30	1,285.80	70,300	1,379.80	1,411.70	48,200	1,081.00	1,102.20
87 .....	95,200	1,219.10	1,244.50	53,900	1,324.90	1,353.00	41,300	1,081.00	1,102.80
88 .....	89,100	1,178.90	1,205.70	49,600	1,267.80	1,297.40	39,500	1,067.20	1,090.50
89 .....	73,200	1,140.70	1,166.20	40,200	1,227.20	1,256.90	33,000	1,035.30	1,055.80
90 or older .....	284,200	1,028.70	1,052.90	137,600	1,107.10	1,135.80	146,600	955.10	975.10

CONTACT: Joseph Bondar/Rona Blumenthal (410) 965-0162/0163 for further information.

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

Table 5.B4.—Number, percent, and average monthly benefit, by year of entitlement as retired worker and sex, December 2000 <sup>1</sup>

[Based on 10-percent sample]

Year of entitlement	Total				Men				Women			
	Number as of December 2000	Percentage distribution	Cumulative percent <sup>2</sup>	Average monthly benefit	Number as of December 2000	Percentage distribution	Cumulative percent <sup>2</sup>	Average monthly benefit	Number as of December 2000	Percentage distribution	Cumulative percent <sup>2</sup>	Average monthly benefit
Total .....	28,505,990	100.0	...	\$844.60	14,771,930	100.0	...	\$951.50	13,734,060	100.0	...	\$729.60
1995–2000 .....	9,328,030	32.7	...	844.50	5,114,610	34.6	...	981.20	4,213,420	30.7	...	678.60
1990–1994 .....	6,658,750	23.4	...	838.70	3,700,620	25.1	...	952.40	2,958,130	21.5	...	696.40
1985–1989 .....	5,506,650	19.3	...	826.80	2,905,150	19.7	...	916.50	2,601,500	18.9	...	726.80
1980–1984 .....	3,828,830	13.4	...	863.50	1,847,900	12.5	...	930.90	1,980,930	14.4	...	800.50
1975–1979 .....	2,085,010	7.3	...	896.70	863,890	5.8	...	973.80	1,221,120	8.9	...	842.20
1970–1974 .....	866,480	3.0	...	819.20	284,570	1.9	...	860.20	581,910	4.2	...	799.20
1965–1969 .....	202,190	.7	...	764.80	50,060	.3	...	802.80	152,130	1.1	...	752.30
Before 1965 .....	30,050	.1	...	673.70	5,130	(3)	...	684.50	24,920	.2	...	671.50
2000 .....	1,769,440	6.2	6.2	880.10	995,880	6.7	6.7	1,033.30	773,560	5.6	5.6	682.70
1999 .....	1,630,560	5.7	11.9	849.80	903,590	6.1	12.9	991.90	726,970	5.3	10.9	673.20
1998 .....	1,514,990	5.3	17.2	832.50	827,570	5.6	18.5	967.80	687,420	5.0	15.9	669.70
1997 .....	1,496,730	5.3	22.5	830.70	809,340	5.5	23.9	963.70	687,390	5.0	20.9	674.20
1996 .....	1,509,080	5.3	27.8	831.20	793,340	5.4	29.3	957.90	715,740	5.2	26.1	690.60
1995 .....	1,407,230	4.9	32.7	835.50	784,890	5.3	34.6	958.40	622,340	4.5	30.7	680.50
1994 .....	1,386,860	4.9	37.6	837.50	770,850	5.2	39.8	957.90	616,010	4.5	35.2	686.90
1993 .....	1,366,810	4.8	42.4	836.50	766,400	5.2	45.0	951.60	600,410	4.4	39.5	689.60
1992 .....	1,360,400	4.8	47.2	838.70	760,570	5.1	50.2	952.60	599,830	4.4	43.9	694.30
1991 .....	1,289,180	4.5	51.7	839.80	716,800	4.9	55.0	949.80	572,380	4.2	48.1	702.10
1990 .....	1,255,500	4.4	56.1	841.00	686,000	4.6	59.7	949.40	569,500	4.1	52.2	710.40
1989 .....	1,196,460	4.2	60.3	833.20	644,190	4.4	64.0	936.20	552,270	4.0	56.2	713.10
1988 .....	1,144,910	4.0	64.3	825.80	607,370	4.1	68.1	921.60	537,540	3.9	60.2	717.50
1987 .....	1,103,460	3.9	68.2	829.00	581,480	3.9	72.1	920.00	521,980	3.8	64.0	727.70
1986 .....	1,074,380	3.8	71.9	824.30	562,530	3.8	75.9	907.00	511,850	3.7	67.7	733.40
1985 .....	987,440	3.5	75.4	820.80	509,580	3.4	79.3	891.80	477,860	3.5	71.2	745.10
1984 .....	895,760	3.1	78.5	820.10	449,390	3.0	82.4	884.80	446,370	3.3	74.4	755.00
1983 .....	853,550	3.0	81.5	839.20	419,920	2.8	85.2	900.70	433,630	3.2	77.6	779.60
1982 .....	767,210	2.7	84.2	857.90	371,370	2.5	87.7	921.40	395,840	2.9	80.4	798.40
1981 .....	686,800	2.4	86.6	905.30	324,900	2.2	89.9	980.20	361,900	2.6	83.1	838.10
1980 .....	625,510	2.2	88.8	919.40	282,320	1.9	91.9	1,004.90	343,190	2.5	85.6	849.10
1979 .....	551,530	1.9	90.8	927.70	239,470	1.6	93.5	1,018.50	312,060	2.3	87.9	858.00
1978 .....	468,790	1.6	92.4	911.40	196,070	1.3	94.8	995.20	272,720	2.0	89.8	851.20
1977 .....	381,000	1.3	93.7	896.50	160,140	1.1	95.9	976.20	220,860	1.6	91.4	838.80
1976 .....	369,930	1.3	95.0	870.60	147,070	1.0	96.9	930.00	222,860	1.6	93.1	831.50
1975 .....	313,760	1.1	96.1	851.40	121,140	.8	97.7	900.60	192,620	1.4	94.5	820.40
1974 .....	260,270	.9	97.1	832.40	93,220	.6	98.3	877.40	167,050	1.2	95.7	807.30
1973 .....	214,570	.8	97.8	823.30	71,720	.5	98.8	859.70	142,850	1.0	96.7	805.00
1972 .....	165,970	.6	98.4	813.30	52,580	.4	99.2	853.70	113,390	.8	97.6	794.60
1971 .....	128,670	.5	98.8	811.00	39,220	.3	99.4	849.90	89,450	.7	98.2	793.90
1970 .....	97,000	.3	99.2	796.00	27,830	.2	99.6	830.30	69,170	.5	98.7	782.30
1969 .....	70,740	.2	99.4	782.70	18,700	.1	99.8	822.60	52,040	.4	99.1	768.40
1968 .....	51,070	.2	99.6	773.10	12,830	.1	99.8	806.50	38,240	.3	99.4	762.00
1967 .....	36,800	.1	99.7	754.30	8,660	.1	99.9	775.30	28,140	.2	99.6	747.90
1966 .....	25,260	.1	99.8	733.40	5,940	(3)	99.9	762.10	19,320	.1	99.7	724.60
1965 .....	18,320	.1	100.0	736.90	3,930	(3)	100.0	818.50	14,390	.1	100.0	714.60

<sup>1</sup> Provisions for Railroad Retirement beneficiaries are described in the section Social Security (Old-Age, Survivors, and Disability Insurance).

<sup>2</sup> Represents those entitled in specified year or later.

<sup>3</sup> Less than 0.05 percent.



5.B OASDI Current-Pay Benefits: Retired Workers

Table 5.B5.—Number, average age, and percentage distribution, by age and sex, 1940–2000<sup>1</sup>

December	Total number (in thousands)	Average age	Percentage distribution, by age							
			Total	62–64	65–69	70–74	75–79	80–84	85 or older	
Men										
1940.....	99	68.8	100.0	...	74.4	17.4	6.4	1.6	0.2	
1945.....	447	71.7	100.0	...	39.9	40.2	15.1	4.0	.7	
1950.....	1,469	72.2	100.0	...	39.1	33.7	20.2	5.9	1.2	
1955.....	3,252	72.7	100.0	...	35.7	34.8	20.0	7.6	1.9	
1960.....	5,217	73.2	100.0	...	33.8	33.1	21.1	9.0	3.1	
1965.....	6,825	72.9	100.0	6.9	29.7	29.5	19.9	9.9	4.1	
1970.....	7,688	72.6	100.0	7.5	30.1	26.9	19.6	10.6	5.3	
1975.....	9,163	72.3	100.0	9.3	32.2	25.6	17.1	10.1	5.7	
1980.....	10,461	72.2	100.0	9.5	32.1	25.8	16.9	9.5	6.1	
1981.....	10,767	72.2	100.0	9.9	31.8	25.7	17.1	9.3	6.2	
1982.....	11,030	72.2	100.0	10.3	31.3	25.6	17.1	9.4	6.2	
1983.....	11,358	72.2	100.0	10.6	31.0	25.8	17.0	9.4	6.1	
1984.....	11,573	72.2	100.0	10.8	30.3	25.9	17.3	9.6	6.1	
1985.....	11,817	72.3	100.0	10.9	30.2	25.9	17.3	9.6	6.1	
1986.....	12,080	72.4	100.0	10.9	30.3	25.7	17.3	9.7	6.1	
1987.....	12,295	72.4	100.0	10.9	30.2	25.5	17.4	9.9	6.1	
1988 <sup>2</sup> .....	12,483	72.4	100.0	10.7	30.0	25.5	17.6	10.0	6.2	
1989.....	12,718	72.5	100.0	10.5	30.1	25.2	17.8	10.1	6.3	
1990 <sup>2</sup> .....	12,985	72.5	100.0	10.3	30.0	25.3	17.8	10.2	6.4	
1991 <sup>2</sup> .....	13,227	72.6	100.0	10.2	29.5	25.7	17.9	10.3	6.4	
1992 <sup>2</sup> .....	13,474	72.7	100.0	10.0	29.2	25.8	17.8	10.5	6.6	
1993 <sup>2</sup> .....	13,649	72.8	100.0	9.9	28.9	25.9	17.9	10.7	6.8	
1994 <sup>2</sup> .....	13,795	72.8	100.0	9.8	28.3	26.2	17.9	10.9	6.9	
1995 <sup>2</sup> .....	13,915	72.9	100.0	9.5	28.0	26.1	18.3	11.1	7.0	
1996 <sup>2</sup> .....	14,012	73.1	100.0	9.2	27.6	25.8	18.9	11.3	7.2	
1997 <sup>2</sup> .....	14,126	73.2	100.0	9.0	27.2	25.8	19.2	11.4	7.4	
1998 <sup>2</sup> .....	14,206	73.3	100.0	9.0	26.6	25.6	19.5	11.6	7.6	
1999 <sup>2</sup> .....	14,329	73.3	100.0	9.1	26.4	25.2	19.8	11.7	7.8	
2000 <sup>2</sup> .....	14,772	73.2	100.0	9.0	27.6	24.6	19.3	11.7	7.8	
Women										
1940.....	13	68.1	100.0	...	82.6	12.8	3.9	0.6	(3)	
1945.....	71	70.8	100.0	...	47.1	40.0	10.2	2.3	0.3	
1950.....	302	71.1	100.0	...	48.4	32.9	15.0	3.2	.5	
1955.....	1,222	71.3	100.0	...	47.8	32.3	14.6	4.4	.8	
1960.....	2,845	71.0	100.0	12.6	36.3	29.0	15.0	5.6	1.6	
1965.....	4,276	71.8	100.0	12.2	31.6	28.1	17.6	7.7	2.8	
1970.....	5,661	72.0	100.0	11.5	30.1	25.4	18.7	10.0	4.4	
1975.....	7,424	72.2	100.0	11.8	30.4	24.2	16.9	10.6	6.1	
1980.....	9,101	72.6	100.0	11.2	29.2	24.2	17.1	10.6	7.7	
1981.....	9,428	72.7	100.0	11.1	28.9	24.0	17.4	10.6	8.0	
1982.....	9,733	72.8	100.0	11.2	28.3	24.0	17.5	10.8	8.2	
1983.....	10,060	72.9	100.0	11.1	28.0	23.9	17.6	11.0	8.4	
1984.....	10,334	73.1	100.0	11.1	27.2	24.0	17.8	11.3	8.6	
1985.....	10,615	73.3	100.0	11.0	26.9	23.9	17.9	11.4	8.8	
1986.....	10,901	73.3	100.0	10.8	26.7	23.8	18.0	11.7	9.0	
1987.....	11,145	73.4	100.0	10.7	26.4	23.6	18.1	11.9	9.3	
1988 <sup>2</sup> .....	11,944	73.5	100.0	10.5	26.0	23.6	18.2	12.2	9.5	
1989.....	11,608	73.6	100.0	10.2	26.1	23.1	18.4	12.4	9.8	
1990 <sup>2</sup> .....	11,842	73.7	100.0	9.9	25.9	23.0	18.5	12.5	10.2	
1991 <sup>2</sup> .....	12,048	73.9	100.0	9.5	25.4	23.2	18.6	12.7	10.5	
1992 <sup>2</sup> .....	12,272	74.0	100.0	9.3	25.2	23.1	18.5	12.9	10.9	
1993 <sup>2</sup> .....	12,447	74.1	100.0	9.0	24.9	23.0	18.6	13.1	11.3	
1994 <sup>2</sup> .....	12,607	74.2	100.0	9.0	24.3	23.2	18.4	13.4	11.6	
1995 <sup>2</sup> .....	12,757	74.3	100.0	8.8	24.0	23.2	18.5	13.5	11.9	
1996 <sup>2</sup> .....	12,887	74.4	100.0	8.7	23.6	22.9	18.8	13.7	12.2	
1997 <sup>2</sup> .....	13,155	74.5	100.0	8.6	23.2	23.0	19.0	13.8	12.5	
1998 <sup>2</sup> .....	13,304	74.6	100.0	8.7	22.8	22.8	19.0	13.9	12.8	
1999 <sup>2</sup> .....	13,453	74.6	100.0	8.8	22.8	22.3	19.3	13.8	13.0	
2000 <sup>2</sup> .....	13,734	74.6	100.0	8.9	23.4	21.9	19.1	13.8	13.0	

<sup>1</sup> Provisions for Railroad Retirement beneficiaries are described in the section Social Security (Old-Age, Survivors, and Disability Insurance).

<sup>2</sup> Based on 10-percent sample.

<sup>3</sup> Less than 0.05 percent.

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

Table 5.B6.—Number and percentage distribution with and without reduction for early retirement, by **monthly benefit** and sex, December 2000<sup>1</sup>

[Based on 10-percent sample]

Monthly benefit and sex	Total		Without reduction for early retirement		With reduction for early retirement	
	Number	Percent	Number	Percent	Number	Percent
<b>Total</b> .....	28,505,990	100.0	8,186,360	100.0	20,319,630	100.0
Less than \$400.00 .....	2,357,730	8.3	418,770	5.1	1,938,960	9.5
\$400.00–\$449.90 .....	1,058,680	3.7	130,150	1.6	928,530	4.6
\$450.00–\$499.90 .....	1,480,780	5.2	232,270	2.8	1,248,510	6.1
\$500.00–\$549.90 .....	1,570,570	5.5	273,300	3.3	1,297,270	6.4
\$550.00–\$599.90 .....	1,363,210	4.8	300,580	3.7	1,062,630	5.2
\$600.00–\$649.90 .....	1,278,600	4.5	330,220	4.0	948,380	4.7
\$650.00–\$699.90 .....	1,206,380	4.2	310,850	3.8	895,530	4.4
\$700.00–\$749.90 .....	1,224,500	4.3	306,920	3.7	917,580	4.5
\$750.00–\$799.90 .....	1,273,520	4.5	298,120	3.6	975,400	4.8
\$800.00–\$849.90 .....	1,383,910	4.9	313,560	3.8	1,070,350	5.3
\$850.00–\$899.90 .....	1,533,810	5.4	336,970	4.1	1,196,840	5.9
\$900.00–\$949.90 .....	1,626,180	5.7	334,870	4.1	1,291,310	6.4
\$950.00–\$999.90 .....	1,657,380	5.8	353,180	4.3	1,304,200	6.4
\$1,000.00–\$1,049.90 .....	1,776,980	6.2	357,170	4.4	1,419,810	7.0
\$1,050.00–\$1,099.90 .....	1,457,620	5.1	356,000	4.3	1,101,620	5.4
\$1,100.00–\$1,149.90 .....	1,209,500	4.2	367,660	4.5	841,840	4.1
\$1,150.00–\$1,199.90 .....	1,006,740	3.5	395,780	4.8	610,960	3.0
\$1,200.00–\$1,249.90 .....	888,430	3.1	422,470	5.2	465,960	2.3
\$1,250.00–\$1,299.90 .....	785,550	2.8	455,940	5.6	329,610	1.6
\$1,300.00 or more.....	2,365,920	8.3	1,891,580	23.1	474,340	2.3
<b>Average benefit, total</b> .....	<b>\$844.60</b>		<b>\$1,008.60</b>		<b>\$778.50</b>	
Men .....	14,771,930	100.0	4,697,670	100.0	10,074,260	100.0
Less than \$400.00 .....	932,830	6.3	189,250	4.0	743,580	7.4
\$400.00–\$449.90 .....	284,680	1.9	46,830	1.0	237,850	2.4
\$450.00–\$499.90 .....	335,840	2.3	80,150	1.7	255,690	2.5
\$500.00–\$549.90 .....	353,180	2.4	85,670	1.8	267,510	2.7
\$550.00–\$599.90 .....	379,360	2.6	87,510	1.9	291,850	2.9
\$600.00–\$649.90 .....	413,290	2.8	94,510	2.0	318,780	3.2
\$650.00–\$699.90 .....	453,080	3.1	95,720	2.0	357,360	3.5
\$700.00–\$749.90 .....	515,130	3.5	103,690	2.2	411,440	4.1
\$750.00–\$799.90 .....	595,610	4.0	111,120	2.4	484,490	4.8
\$800.00–\$849.90 .....	702,260	4.8	126,830	2.7	575,430	5.7
\$850.00–\$899.90 .....	848,350	5.7	144,510	3.1	703,840	7.0
\$900.00–\$949.90 .....	978,620	6.6	153,380	3.3	825,240	8.2
\$950.00–\$999.90 .....	1,068,170	7.2	178,740	3.8	889,430	8.8
\$1,000.00–\$1,049.90 .....	1,244,070	8.4	197,510	4.2	1,046,560	10.4
\$1,050.00–\$1,099.90 .....	1,037,330	7.0	214,900	4.6	822,430	8.2
\$1,100.00–\$1,149.90 .....	869,490	5.9	246,630	5.3	622,860	6.2
\$1,150.00–\$1,199.90 .....	726,840	4.9	287,910	6.1	438,930	4.4
\$1,200.00–\$1,249.90 .....	652,480	4.4	322,080	6.9	330,400	3.3
\$1,250.00–\$1,299.90 .....	581,460	3.9	360,810	7.7	220,650	2.2
\$1,300.00 or more.....	1,799,860	12.2	1,569,920	33.4	229,940	2.3
<b>Average benefit, men</b> .....	<b>\$951.50</b>		<b>\$1,131.30</b>		<b>\$867.60</b>	
Women .....	13,734,060	100.0	3,488,690	100.0	10,245,370	100.0
Less than \$400.00 .....	1,424,900	10.4	229,520	6.6	1,195,380	11.7
\$400.00–\$449.90 .....	774,000	5.6	83,320	2.4	690,680	6.7
\$450.00–\$499.90 .....	1,144,940	8.3	152,120	4.4	992,820	9.7
\$500.00–\$549.90 .....	1,217,390	8.9	187,630	5.4	1,029,760	10.1
\$550.00–\$599.90 .....	983,850	7.2	213,070	6.1	770,780	7.5
\$600.00–\$649.90 .....	865,310	6.3	235,710	6.8	629,600	6.1
\$650.00–\$699.90 .....	753,300	5.5	215,130	6.2	538,170	5.3
\$700.00–\$749.90 .....	709,370	5.2	203,230	5.8	506,140	4.9
\$750.00–\$799.90 .....	677,910	4.9	187,000	5.4	490,910	4.8
\$800.00–\$849.90 .....	681,650	5.0	186,730	5.4	494,920	4.8
\$850.00–\$899.90 .....	685,460	5.0	192,460	5.5	493,000	4.8
\$900.00–\$949.90 .....	647,560	4.7	181,490	5.2	466,070	4.5
\$950.00–\$999.90 .....	589,210	4.3	174,440	5.0	414,770	4.0
\$1,000.00–\$1,049.90 .....	532,910	3.9	159,660	4.6	373,250	3.6
\$1,050.00–\$1,099.90 .....	420,290	3.1	141,100	4.0	279,190	2.7
\$1,100.00–\$1,149.90 .....	340,010	2.5	121,030	3.5	218,980	2.1
\$1,150.00–\$1,199.90 .....	279,900	2.0	107,870	3.1	172,030	1.7
\$1,200.00–\$1,249.90 .....	235,950	1.7	100,390	2.9	135,560	1.3
\$1,250.00–\$1,299.90 .....	204,090	1.5	95,130	2.7	108,960	1.1
\$1,300.00 or more.....	566,060	4.1	321,660	9.2	244,400	2.4
<b>Average benefit, women</b> .....	<b>\$729.60</b>		<b>\$843.50</b>		<b>\$690.80</b>	

<sup>1</sup> Provisions for Railroad Retirement beneficiaries are described in the section Social Security (Old-Age, Survivors, and Disability Insurance).

CONTACT: Rona Blumenthal/Joseph Bondar (410) 965-0163/0162 for further information.

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

Table 5.B7.—Number and percentage distribution with and without reduction for early retirement, by primary insurance amount and sex, December 2000<sup>1</sup>

[Based on 10-percent sample]

Primary insurance amount and sex	Total		Without reduction for early retirement		With reduction for early retirement	
	Number	Percent	Number	Percent	Number	Percent
<b>Total</b> .....	28,505,990	100.0	8,186,360	100.0	20,319,630	100.0
Less than \$400.00 .....	3,593,350	12.6	718,650	8.8	2,874,700	14.1
\$400.00–\$449.90 .....	914,800	3.2	194,020	2.4	720,780	3.5
\$450.00–\$499.90 .....	1,408,900	4.9	317,960	3.9	1,090,940	5.4
\$500.00–\$549.90 .....	1,322,630	4.6	299,590	3.7	1,023,040	5.0
\$550.00–\$599.90 .....	1,217,530	4.3	292,740	3.6	924,790	4.6
\$600.00–\$649.90 .....	1,285,820	4.5	311,610	3.8	974,210	4.8
\$650.00–\$699.90 .....	1,148,970	4.0	290,570	3.5	858,400	4.2
\$700.00–\$749.90 .....	1,120,780	3.9	299,560	3.7	821,220	4.0
\$750.00–\$799.90 .....	1,078,100	3.8	301,590	3.7	776,510	3.8
\$800.00–\$849.90 .....	1,055,230	3.7	305,480	3.7	749,750	3.7
\$850.00–\$899.90 .....	1,075,550	3.8	320,130	3.9	755,420	3.7
\$900.00–\$949.90 .....	1,045,090	3.7	306,980	3.7	738,110	3.6
\$950.00–\$999.90 .....	1,090,930	3.8	328,550	4.0	762,380	3.8
\$1,000.00–\$1,049.90 .....	1,115,940	3.9	333,560	4.1	782,380	3.9
\$1,050.00–\$1,099.90 .....	1,171,480	4.1	335,820	4.1	835,660	4.1
\$1,100.00–\$1,149.90 .....	1,313,320	4.6	367,740	4.5	945,580	4.7
\$1,150.00–\$1,199.90 .....	1,325,490	4.6	414,460	5.1	911,030	4.5
\$1,200.00–\$1,249.90 .....	1,430,200	5.0	466,730	5.7	963,470	4.7
\$1,250.00–\$1,299.90 .....	1,531,390	5.4	492,460	6.0	1,038,930	5.1
\$1,300.00 or more .....	3,260,490	11.4	1,488,160	18.2	1,772,330	8.7
<b>Average primary insurance amount, total</b> .....	<b>\$851.20</b>		<b>\$939.60</b>		<b>\$815.50</b>	
<b>Men</b> .....	14,771,930	100.0	4,697,670	100.0	10,074,260	100.0
Less than \$400.00 .....	712,940	4.8	200,270	4.3	512,670	5.1
\$400.00–\$449.90 .....	184,320	1.2	51,640	1.1	132,680	1.3
\$450.00–\$499.90 .....	291,940	2.0	86,750	1.8	205,190	2.0
\$500.00–\$549.90 .....	296,550	2.0	87,100	1.9	209,450	2.1
\$550.00–\$599.90 .....	298,320	2.0	88,400	1.9	209,920	2.1
\$600.00–\$649.90 .....	333,240	2.3	97,030	2.1	236,210	2.3
\$650.00–\$699.90 .....	335,730	2.3	96,170	2.0	239,560	2.4
\$700.00–\$749.90 .....	370,010	2.5	106,020	2.3	263,990	2.6
\$750.00–\$799.90 .....	397,790	2.7	113,290	2.4	284,500	2.8
\$800.00–\$849.90 .....	447,330	3.0	129,630	2.8	317,700	3.2
\$850.00–\$899.90 .....	514,100	3.5	147,440	3.1	366,660	3.6
\$900.00–\$949.90 .....	566,280	3.8	155,530	3.3	410,750	4.1
\$950.00–\$999.90 .....	661,780	4.5	186,440	4.0	475,340	4.7
\$1,000.00–\$1,049.90 .....	748,320	5.1	207,780	4.4	540,540	5.4
\$1,050.00–\$1,099.90 .....	867,030	5.9	227,440	4.8	639,590	6.3
\$1,100.00–\$1,149.90 .....	1,060,130	7.2	271,920	5.8	788,210	7.8
\$1,150.00–\$1,199.90 .....	1,118,120	7.6	328,810	7.0	789,310	7.8
\$1,200.00–\$1,249.90 .....	1,239,450	8.4	382,610	8.1	856,840	8.5
\$1,250.00–\$1,299.90 .....	1,362,880	9.2	415,020	8.8	947,860	9.4
\$1,300.00 or more .....	2,965,670	20.1	1,318,380	28.1	1,647,290	16.4
<b>Average primary insurance amount, men</b> .....	<b>\$1,041.80</b>		<b>\$1,089.80</b>		<b>\$1,019.50</b>	
<b>Women</b> .....	13,734,060	100.0	3,488,690	100.0	10,245,370	100.0
Less than \$400.00 .....	2,880,410	21.0	518,380	14.9	2,362,030	23.1
\$400.00–\$449.90 .....	730,480	5.3	142,380	4.1	588,100	5.7
\$450.00–\$499.90 .....	1,116,960	8.1	231,210	6.6	885,750	8.6
\$500.00–\$549.90 .....	1,026,080	7.5	212,490	6.1	813,590	7.9
\$550.00–\$599.90 .....	919,210	6.7	204,340	5.9	714,870	7.0
\$600.00–\$649.90 .....	952,580	6.9	214,580	6.2	738,000	7.2
\$650.00–\$699.90 .....	813,240	5.9	194,400	5.6	618,840	6.0
\$700.00–\$749.90 .....	750,770	5.5	193,540	5.5	557,230	5.4
\$750.00–\$799.90 .....	680,310	5.0	188,300	5.4	492,010	4.8
\$800.00–\$849.90 .....	607,900	4.4	175,850	5.0	432,050	4.2
\$850.00–\$899.90 .....	561,450	4.1	172,690	4.9	388,760	3.8
\$900.00–\$949.90 .....	478,810	3.5	151,450	4.3	327,360	3.2
\$950.00–\$999.90 .....	429,150	3.1	142,110	4.1	287,040	2.8
\$1,000.00–\$1,049.90 .....	367,620	2.7	125,780	3.6	241,840	2.4
\$1,050.00–\$1,099.90 .....	304,450	2.2	108,380	3.1	196,070	1.9
\$1,100.00–\$1,149.90 .....	253,190	1.8	95,820	2.7	157,370	1.5
\$1,150.00–\$1,199.90 .....	207,370	1.5	85,650	2.5	121,720	1.2
\$1,200.00–\$1,249.90 .....	190,750	1.4	84,120	2.4	106,630	1.0
\$1,250.00–\$1,299.90 .....	168,510	1.2	77,440	2.2	91,070	0.9
\$1,300.00 or more .....	294,820	2.1	169,780	4.9	125,040	1.2
<b>Average primary insurance amount, women</b> .....	<b>\$646.10</b>		<b>\$737.40</b>		<b>\$615.00</b>	

<sup>1</sup> Provisions for Railroad Retirement beneficiaries are described in the section Social Security (Old-Age, Survivors, and Disability Insurance).

CONTACT: Rona Blumenthal/Joseph Bondar (410) 965-0163/0162 for further information.

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

Table 5.B8.—Number and average monthly benefit with and without reduction for early retirement, by sex, 1956–2000<sup>1</sup>

December	Retired workers				Average monthly benefit		
	Total	Without reduction for early retirement	With reduction for early retirement		Total	Without reduction for early retirement	With reduction for early retirement
			Number	Percent			
Total							
1956.....	5,112,430	4,997,401	115,029	2.2	\$63.10	\$63.40	\$48.20
1960.....	8,061,469	7,112,265	949,204	11.8	74.00	76.50	55.80
1965.....	11,100,584	7,581,386	3,519,198	31.7	83.90	90.10	70.60
1970.....	13,349,175	7,282,295	6,066,880	45.4	118.10	130.20	103.60
1980.....	19,562,085	7,397,198	12,164,887	62.2	341.40	391.80	310.70
1985.....	22,431,930	7,220,959	14,710,971	65.6	478.60	581.20	424.80
1990.....	24,838,100	7,840,239	16,997,861	68.4	602.60	742.80	537.90
1991.....	25,288,719	7,928,127	17,360,592	68.6	629.30	776.50	562.10
1992.....	25,757,727	8,020,443	17,737,284	68.9	652.60	805.40	583.60
1993.....	26,104,305	8,068,985	18,035,320	69.1	674.10	831.80	603.50
1994.....	26,407,756	8,109,975	18,297,781	69.3	697.30	859.70	625.40
1995.....	26,672,806	7,941,363	18,731,443	70.2	719.80	885.60	649.50
1996.....	26,898,072	7,784,078	19,113,994	71.1	745.00	908.70	678.30
1997.....	27,274,572	7,673,286	19,601,286	71.9	765.00	915.90	705.90
1998.....	27,510,535	7,699,664	19,810,871	72.0	779.70	932.50	720.30
1999.....	27,774,677	7,739,557	20,035,120	72.1	804.30	959.20	744.40
2000.....	28,498,945	8,179,425	20,319,520	71.3	844.50	1,008.40	778.50
Men							
1956.....	3,572,271	3,572,271	...	...	\$68.20	\$68.20	...
1960.....	5,216,668	5,216,668	...	...	81.90	81.90	...
1965.....	6,825,078	5,389,166	1,435,912	21.0	92.60	96.10	\$79.40
1970.....	7,688,460	4,930,400	2,758,060	35.9	130.50	139.10	115.30
1980.....	10,460,735	4,586,539	5,874,196	54.8	380.20	419.60	349.50
1985.....	11,816,956	4,655,477	7,161,479	60.6	538.40	627.50	480.50
1990.....	12,983,832	4,592,911	8,390,921	64.6	679.30	803.60	611.20
1991.....	13,222,776	4,621,584	8,601,192	65.0	709.30	840.50	638.90
1992.....	13,470,502	4,649,446	8,821,056	65.5	735.50	872.50	663.30
1993.....	13,645,386	4,645,649	8,999,737	66.0	759.30	901.70	685.80
1994.....	13,790,997	4,639,089	9,151,908	66.4	785.20	932.80	710.50
1995.....	13,913,531	4,559,535	9,353,996	67.2	810.20	963.70	735.40
1996.....	14,010,875	4,478,565	9,532,310	68.0	838.10	997.80	763.10
1997.....	14,116,818	4,371,503	9,745,315	69.0	860.50	1,025.10	786.60
1998.....	14,200,826	4,371,895	9,828,931	69.2	876.90	1,044.50	802.40
1999.....	14,321,468	4,385,921	9,935,547	69.4	904.60	1,075.30	829.30
2000.....	14,767,170	4,690,652	10,076,518	68.2	951.10	1,131.10	867.20
Women							
1956.....	1,540,159	1,425,130	115,029	7.5	\$51.20	\$51.40	\$48.20
1960.....	2,844,801	1,895,597	949,204	33.4	59.70	61.60	55.80
1965.....	4,275,506	2,192,220	2,083,286	48.7	70.10	75.40	64.50
1970.....	5,660,715	2,351,895	3,308,820	58.5	101.20	111.70	93.80
1980.....	9,101,350	2,810,659	6,290,691	69.1	296.80	346.50	274.60
1985.....	10,614,974	3,065,482	7,549,492	71.1	412.10	511.00	372.00
1990.....	11,854,268	3,247,328	8,606,940	72.6	518.60	656.80	466.40
1991.....	12,065,943	3,306,543	8,759,400	72.6	541.60	687.00	486.80
1992.....	12,287,225	3,370,997	8,916,228	72.6	561.80	712.90	504.70
1993.....	12,458,919	3,423,336	9,035,583	72.5	580.70	736.90	521.50
1994.....	12,616,759	3,470,886	9,145,873	72.5	601.30	762.10	540.20
1995.....	12,759,275	3,381,828	9,377,447	73.5	621.20	780.40	563.80
1996.....	12,887,197	3,305,513	9,581,684	74.4	643.70	788.00	593.90
1997.....	13,157,754	3,301,783	9,855,971	74.9	662.50	771.30	626.10
1998.....	13,309,709	3,327,769	9,981,940	75.0	675.90	785.40	639.50
1999.....	13,453,209	3,353,636	10,099,573	75.1	697.50	807.50	661.00
2000.....	13,731,775	3,488,773	10,243,002	74.6	729.90	843.40	691.20

<sup>1</sup> Provisions for Railroad Retirement beneficiaries are described in the section Social Security (Old-Age, Survivors, and Disability Insurance).

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

**Table 5.B9.—Number and percentage distribution, by monthly benefit, age, and sex, December 2000**

[Based on 10-percent sample]

Monthly benefit	Total	Age attained during 2000						
		62–64	65–69	70–74	75–79	80–84	85–89	90 or older
Total								
Total number (in thousands).....	28,506	2,553	7,285	6,636	5,473	3,623	1,985	951
Total percent.....	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0
Less than \$400.00 .....	8.3	10.9	8.7	8.2	8.1	7.5	6.7	7.9
\$400.00–\$449.90 .....	3.7	5.0	3.5	3.8	4.1	3.0	2.6	2.8
\$450.00–\$499.90 .....	5.2	6.3	5.4	5.9	5.3	4.0	3.3	3.7
\$500.00–\$549.90 .....	5.5	8.4	6.6	5.6	4.7	4.1	3.4	4.0
\$550.00–\$599.90 .....	4.8	7.0	5.2	4.8	4.4	3.9	3.5	4.0
\$600.00–\$649.90 .....	4.5	5.1	4.9	4.6	4.3	3.8	3.8	4.4
\$650.00–\$699.90 .....	4.2	4.3	4.5	4.3	4.1	3.9	3.9	4.7
\$700.00–\$749.90 .....	4.3	3.9	4.4	4.2	4.2	4.2	4.7	5.9
\$750.00–\$799.90 .....	4.5	3.9	4.0	4.1	4.5	4.9	5.8	7.6
\$800.00–\$849.90 .....	4.9	3.8	4.1	4.4	5.0	5.8	6.5	8.5
\$850.00–\$899.90 .....	5.4	3.7	4.2	4.7	6.0	7.6	6.9	8.6
\$900.00–\$949.90 .....	5.7	3.7	4.3	5.2	8.1	6.7	6.2	7.1
\$950.00–\$999.90 .....	5.8	3.7	4.6	6.6	7.2	6.0	5.8	6.8
\$1,000.00–\$1,049.90 .....	6.2	4.1	6.6	7.9	5.7	5.5	5.2	5.6
\$1,050.00–\$1,099.90 .....	5.1	5.4	6.5	5.0	4.1	4.6	4.1	4.1
\$1,100.00–\$1,149.90 .....	4.2	7.0	4.6	3.5	4.0	4.3	3.4	2.5
\$1,150.00–\$1,199.90 .....	3.5	6.2	3.0	3.1	3.8	4.0	3.0	1.7
\$1,200.00–\$1,249.90 .....	3.1	4.1	2.8	3.2	3.2	3.4	2.9	1.4
\$1,250.00–\$1,299.90 .....	2.8	2.4	2.9	2.8	2.5	3.1	3.5	1.3
\$1,300.00 or more.....	8.3	1.2	9.2	8.5	7.1	9.8	14.8	7.3
<b>Average benefit .....</b>	<b>\$844.60</b>	<b>\$766.10</b>	<b>\$836.20</b>	<b>\$842.20</b>	<b>\$839.70</b>	<b>\$884.00</b>	<b>\$927.70</b>	<b>\$841.20</b>
Men								
Total number (in thousands).....	14,772	1,330	4,076	3,631	2,855	1,734	828	318
Total percent.....	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0
Less than \$400.00 .....	6.3	7.6	6.4	6.0	6.2	6.5	5.9	6.8
\$400.00–\$449.90 .....	1.9	2.4	1.7	1.9	2.0	1.9	1.9	2.5
\$450.00–\$499.90 .....	2.3	2.4	2.1	2.3	2.4	2.2	2.3	3.0
\$500.00–\$549.90 .....	2.4	2.5	2.3	2.4	2.5	2.3	2.2	3.1
\$550.00–\$599.90 .....	2.6	2.7	2.5	2.6	2.6	2.4	2.4	3.2
\$600.00–\$649.90 .....	2.8	2.9	2.7	2.8	2.9	2.7	2.8	3.3
\$650.00–\$699.90 .....	3.1	3.2	3.0	3.0	3.1	3.1	2.9	3.7
\$700.00–\$749.90 .....	3.5	3.5	3.3	3.5	3.6	3.5	3.6	4.6
\$750.00–\$799.90 .....	4.0	3.8	3.7	3.9	4.1	4.3	5.0	7.0
\$800.00–\$849.90 .....	4.8	4.1	4.1	4.4	5.1	5.8	5.7	7.4
\$850.00–\$899.90 .....	5.7	4.4	4.6	5.1	6.7	9.0	6.1	7.0
\$900.00–\$949.90 .....	6.6	4.7	5.0	6.0	10.4	7.5	5.7	7.0
\$950.00–\$999.90 .....	7.2	5.1	5.7	8.7	9.4	6.5	5.4	8.0
\$1,000.00–\$1,049.90 .....	8.4	6.0	9.3	11.3	7.1	6.2	5.0	7.2
\$1,050.00–\$1,099.90 .....	7.0	8.5	9.7	6.8	4.9	5.3	4.1	5.5
\$1,100.00–\$1,149.90 .....	5.9	11.7	6.8	4.5	4.9	5.3	3.9	3.5
\$1,150.00–\$1,199.90 .....	4.9	10.8	4.2	4.0	4.9	5.2	3.6	2.1
\$1,200.00–\$1,249.90 .....	4.4	7.4	3.9	4.4	4.3	4.3	3.8	1.9
\$1,250.00–\$1,299.90 .....	3.9	4.4	4.3	3.9	3.3	3.8	4.9	1.7
\$1,300.00 or more.....	12.2	2.0	14.6	12.7	9.7	12.3	22.8	11.4
<b>Average benefit .....</b>	<b>\$951.50</b>	<b>\$913.70</b>	<b>\$964.40</b>	<b>\$955.30</b>	<b>\$927.00</b>	<b>\$953.40</b>	<b>\$1,025.80</b>	<b>\$916.60</b>
Women								
Total number (in thousands).....	13,734	1,223	3,209	3,005	2,618	1,889	1,157	633
Total percent.....	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0
Less than \$400.00 .....	10.5	14.5	11.5	10.9	10.2	8.4	7.3	8.5
\$400.00–\$449.90 .....	5.5	7.9	5.9	6.0	6.3	4.1	3.1	2.9
\$450.00–\$499.90 .....	8.3	10.5	9.5	10.3	8.4	5.7	4.1	4.1
\$500.00–\$549.90 .....	8.9	14.7	12.0	9.4	7.1	5.7	4.2	4.4
\$550.00–\$599.90 .....	7.2	11.7	8.6	7.4	6.4	5.2	4.4	4.4
\$600.00–\$649.90 .....	6.3	7.5	7.6	6.7	5.8	4.9	4.6	5.0
\$650.00–\$699.90 .....	5.5	5.5	6.5	5.8	5.1	4.6	4.7	5.1
\$700.00–\$749.90 .....	5.2	4.5	5.7	5.0	4.8	4.9	5.4	6.6
\$750.00–\$799.90 .....	4.9	3.9	4.5	4.4	4.8	5.4	6.3	8.0
\$800.00–\$849.90 .....	5.0	3.4	4.1	4.3	5.0	5.8	7.1	9.1
\$850.00–\$899.90 .....	5.0	2.9	3.8	4.2	5.2	6.3	7.4	9.4
\$900.00–\$949.90 .....	4.7	2.6	3.4	4.2	5.6	6.1	6.5	7.2
\$950.00–\$999.90 .....	4.3	2.2	3.1	4.0	4.9	5.5	6.1	6.2
\$1,000.00–\$1,049.90 .....	3.9	2.0	3.2	3.8	4.1	4.9	5.3	4.8
\$1,050.00–\$1,099.90 .....	3.1	2.0	2.5	2.9	3.3	4.0	4.1	3.4
\$1,100.00–\$1,149.90 .....	2.5	2.0	1.9	2.2	2.9	3.4	3.0	2.0
\$1,150.00–\$1,199.90 .....	2.0	1.2	1.5	2.0	2.5	2.9	2.6	1.5
\$1,200.00–\$1,249.90 .....	1.7	.6	1.3	1.8	2.0	2.5	2.3	1.2
\$1,250.00–\$1,299.90 .....	1.5	.3	1.2	1.4	1.6	2.4	2.5	1.2
\$1,300.00 or more.....	4.1	.2	2.4	3.3	4.2	7.4	9.1	5.2
<b>Average benefit .....</b>	<b>\$729.60</b>	<b>\$605.50</b>	<b>\$673.30</b>	<b>\$705.50</b>	<b>\$744.60</b>	<b>\$820.30</b>	<b>\$857.40</b>	<b>\$803.40</b>

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

Table 5.C1.—Number and percentage distribution, by type of benefit and primary insurance amount, December 2000<sup>1</sup>  
 [Based on 10-percent sample]

Primary insurance amount	Retired workers		Wives and husbands		Children	
	Number	Percent	Number	Percent	Number	Percent
Total .....	28,505,990	100.0	2,797,170	100.0	457,960	100.0
Less than \$300.00 .....	1,904,920	6.7	76,120	2.7	14,300	3.1
\$300.00–\$349.90 .....	1,025,870	3.6	33,920	1.2	7,090	1.5
\$350.00–\$399.90 .....	662,560	2.3	25,300	.9	5,970	1.3
\$400.00–\$449.90 .....	914,800	3.2	36,640	1.3	7,260	1.6
\$450.00–\$499.90 .....	1,408,900	4.9	54,640	2.0	15,390	3.4
\$500.00–\$549.90 .....	1,322,630	4.6	54,480	1.9	15,570	3.4
\$550.00–\$599.90 .....	1,217,530	4.3	53,690	1.9	16,170	3.5
\$600.00–\$649.90 .....	1,285,820	4.5	57,490	2.1	16,450	3.6
\$650.00–\$699.90 .....	1,148,970	4.0	58,730	2.1	17,180	3.8
\$700.00–\$749.90 .....	1,120,780	3.9	64,000	2.3	18,160	4.0
\$750.00–\$799.90 .....	1,078,100	3.8	67,970	2.4	19,150	4.2
\$800.00–\$849.90 .....	1,055,230	3.7	75,840	2.7	18,250	4.0
\$850.00–\$899.90 .....	1,075,550	3.8	87,300	3.1	20,430	4.5
\$900.00–\$949.90 .....	1,045,090	3.7	93,910	3.4	19,540	4.3
\$950.00–\$999.90 .....	1,090,930	3.8	111,380	4.0	20,740	4.5
\$1,000.00–\$1,049.90 .....	1,115,940	3.9	125,570	4.5	20,700	4.5
\$1,050.00–\$1,099.90 .....	1,171,480	4.1	152,760	5.5	21,980	4.8
\$1,100.00–\$1,149.90 .....	1,313,320	4.6	204,700	7.3	24,120	5.3
\$1,150.00–\$1,199.90 .....	1,325,490	4.6	227,980	8.2	23,540	5.1
\$1,200.00–\$1,249.90 .....	1,430,200	5.0	257,030	9.2	27,200	5.9
\$1,250.00–\$1,299.90 .....	1,531,390	5.4	284,760	10.2	31,310	6.8
\$1,300.00 or more .....	3,260,490	11.4	592,960	21.2	77,460	16.9
<b>Average primary insurance amount.....</b>	<b>\$851.20</b>		<b>\$1,057.50</b>		<b>\$957.60</b>	

<sup>1</sup> Provisions for Railroad Retirement beneficiaries are described in the section Social Security (Old-Age, Survivors, and Disability Insurance).

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

Table 5.C2.—Average monthly benefit, by type of benefit and sex, 1940–2000

December	Retired workers			Wives			Husbands	Children			
	Total	Men	Women	Total	Entitled solely by age <sup>1</sup>	Entitled because of children <sup>2</sup>		Total	Under age 18	Disabled, aged 18 or older	Students
1940.....	\$22.60	\$23.17	\$18.37	\$12.13	\$12.13	...	...	\$12.22	\$12.22	...	...
1941.....	22.70	23.32	18.48	12.11	12.11	...	...	12.19	12.19	...	...
1942.....	23.02	23.71	18.73	12.28	12.28	...	...	12.24	12.24	...	...
1943.....	23.42	24.17	19.06	12.49	12.49	...	...	12.31	12.31	...	...
1944.....	23.73	24.48	19.35	12.63	12.63	...	...	12.38	12.38	...	...
1945.....	24.19	24.94	19.51	12.82	12.82	...	...	12.45	12.45	...	...
1946.....	24.55	25.30	19.64	12.99	12.99	...	...	12.57	12.57	...	...
1947.....	24.90	25.68	19.91	13.17	13.17	...	...	12.77	12.77	...	...
1948.....	25.35	26.21	20.11	13.42	13.42	...	...	12.99	12.99	...	...
1949.....	26.00	26.92	20.58	13.76	13.76	...	...	13.18	13.18	...	...
1950.....	43.86	45.67	35.05	23.60	23.79	\$12.85	\$20.01	17.05	17.05	...	...
1951.....	42.14	44.44	33.03	22.75	23.16	14.33	19.49	13.37	13.37	...	...
1952.....	49.25	52.16	39.17	26.01	26.48	16.33	22.31	14.67	14.67	...	...
1953.....	51.10	54.46	40.66	27.08	27.53	17.97	23.10	15.79	15.79	...	...
1954.....	59.14	63.34	47.05	31.81	32.36	21.11	26.61	18.53	18.53	...	...
1955.....	61.90	66.40	49.93	33.12	33.63	22.96	27.27	20.01	20.01	...	...
1956.....	63.09	68.23	51.16	33.76	34.22	23.64	27.90	20.63	20.63	...	...
1957.....	64.58	70.47	52.23	34.41	34.89	24.21	29.39	21.89	20.90	\$31.55	...
1958.....	66.35	72.74	53.55	35.11	35.59	25.12	30.45	22.99	21.66	32.00	...
1959.....	72.78	80.11	58.81	38.24	38.68	29.39	33.85	27.34	25.61	35.08	...
1960.....	74.04	81.87	59.67	38.74	39.19	30.15	34.72	28.25	26.38	35.70	...
1961.....	75.65	83.13	62.00	39.47	40.09	29.45	36.61	27.52	25.56	36.22	...
1962.....	76.19	83.79	62.61	39.64	40.35	29.55	37.05	27.39	25.44	36.35	...
1963.....	76.88	84.69	63.42	39.95	40.66	29.94	37.64	27.85	25.76	36.84	...
1964.....	77.57	85.58	64.28	40.24	40.95	30.16	38.18	28.13	25.86	37.34	...
1965.....	83.92	92.59	70.07	43.64	44.41	32.60	41.69	31.98	28.27	40.64	\$46.75
1966.....	84.35	93.26	70.79	43.82	44.60	32.64	42.21	32.72	28.18	41.03	45.05
1967.....	85.37	94.49	71.92	44.25	45.01	32.92	42.79	33.10	28.34	41.49	45.07
1968.....	98.86	109.08	84.24	51.22	52.13	37.66	49.29	38.12	32.44	47.79	51.08
1969.....	100.40	110.96	85.71	51.89	52.81	38.00	49.90	38.63	32.79	48.46	51.33
1970.....	118.10	130.53	101.22	61.20	62.41	43.23	58.47	44.85	37.72	56.79	59.46
1971.....	132.17	146.13	113.60	68.36	69.82	47.07	65.25	49.36	41.08	62.57	65.93
1972.....	162.35	179.44	140.11	84.11	86.07	56.10	79.97	59.90	49.44	75.91	80.13
1973.....	166.40	182.60	145.80	84.80	86.80	56.80	80.80	61.10	50.30	77.00	82.70
1974.....	188.20	206.56	165.47	95.77	98.08	64.24	90.90	69.63	57.10	86.61	94.21
1975.....	207.18	227.75	181.80	105.21	107.74	70.72	99.07	77.42	63.13	94.75	103.88
1976.....	224.86	247.70	197.08	114.15	116.82	77.29	106.68	85.64	69.55	102.81	113.92
1977.....	243.00	268.40	212.60	123.30	126.20	84.20	100.90	94.90	76.90	112.30	124.60
1978.....	263.20	291.60	229.70	133.10	136.00	91.70	106.00	104.70	85.10	121.70	138.40
1979.....	294.30	326.80	256.50	148.80	151.90	102.90	116.00	119.20	97.00	137.10	157.20
1980.....	341.40	380.20	296.80	172.50	176.00	120.40	132.10	140.00	114.30	159.80	184.00
1981.....	386.00	431.10	334.50	195.40	199.20	138.20	145.90	161.40	131.10	182.20	210.60
1982.....	419.30	469.60	362.20	213.60	216.90	148.80	156.00	165.00	145.90	198.40	179.70
1983.....	440.80	495.00	379.60	226.50	229.50	151.30	160.90	175.80	163.20	210.10	153.50
1984.....	460.60	517.80	396.50	237.20	240.30	156.70	165.80	185.50	170.60	220.80	149.90
1985.....	478.60	538.40	412.10	247.20	250.30	161.90	169.50	197.60	177.40	230.80	232.30
1986.....	488.50	549.80	420.50	252.70	255.70	165.10	170.40	203.80	182.50	236.80	241.20
1987.....	512.70	577.50	441.20	265.40	268.40	174.00	175.90	215.90	192.70	249.90	252.60
1988.....	536.80	604.90	462.00	278.00	281.00	182.40	181.50	227.70	201.60	263.30	265.40
1989.....	566.90	638.90	487.90	293.80	296.80	194.00	189.10	242.40	213.80	279.30	283.70
1990.....	602.60	679.30	518.60	312.30	315.40	208.10	198.20	259.40	228.50	298.30	300.90
1991.....	629.30	709.30	541.60	326.10	329.20	219.40	203.30	272.70	240.60	312.90	306.70
1992.....	652.60	735.50	561.80	337.90	341.00	229.30	208.20	285.20	252.30	326.00	322.20
1993.....	674.10	759.30	580.70	348.80	351.80	238.70	212.10	296.80	263.10	338.00	333.40
1994.....	697.30	785.20	610.30	360.50	363.60	248.60	216.40	309.30	275.00	351.10	349.60
1995.....	719.80	810.20	621.20	371.90	375.00	256.70	220.80	321.50	286.70	363.80	360.30
1996.....	745.00	838.10	643.70	385.10	387.70	277.30	225.70	337.10	303.00	378.40	374.70
1997.....	765.00	860.50	662.50	394.70	397.20	286.40	228.80	349.00	314.90	389.80	388.40
1998.....	779.70	876.90	675.90	401.70	404.00	294.90	230.50	358.40	324.30	399.00	398.00
1999.....	804.30	904.60	697.50	413.00	415.30	307.50	234.50	372.40	338.90	413.00	417.30
2000.....	844.50	951.10	729.90	431.30	433.50	328.90	242.70	394.80	363.40	433.70	444.40

<sup>1</sup> Aged 62 or older. Includes wives aged 65 or older with children.

<sup>2</sup> Under age 65 with entitled children in their care.

CONTACT: Rona Blumenthal/Joseph Bondar (410) 965-0163/0162 for further information.

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

Table 5.D1.—Number, percent, and average monthly benefit, by year of entitlement as disabled worker and sex, December 2000 <sup>1</sup>

[Based on 10-percent sample]

Year of entitlement	Total				Men				Women			
	Number as of December 2000	Percentage distribution	Cumulative percent <sup>2</sup>	Average monthly benefit	Number as of December 2000	Percentage distribution	Cumulative percent <sup>2</sup>	Average monthly benefit	Number as of December 2000	Percentage distribution	Cumulative percent <sup>2</sup>	Average monthly benefit
Total .....	5,035,840	100.0	...	\$787.00	2,856,870	100.0	...	\$883.00	2,178,970	100.0	...	\$661.10
1995-2000 .....	2,334,220	46.4	...	816.50	1,258,250	44.0	...	932.30	1,075,970	49.4	...	681.00
1990-1994 .....	1,504,830	29.9	...	762.70	839,140	29.4	...	862.10	665,690	30.6	...	637.30
1985-1989 .....	619,020	12.3	...	744.00	372,360	13.0	...	823.10	246,660	11.3	...	624.50
1980-1984 .....	286,440	5.7	...	713.20	188,270	6.6	...	767.80	98,170	4.5	...	608.40
1975-1979 .....	178,630	3.5	...	897.10	120,120	4.2	...	950.60	58,510	2.7	...	787.40
1970-1974 .....	87,810	1.7	...	778.40	60,370	2.1	...	807.50	27,440	1.3	...	714.40
1965-1969 .....	22,950	.5	...	656.80	16,960	.6	...	666.80	5,990	.3	...	628.50
1960-1964 .....	1,940	(3)	...	640.10	1,400	(3)	...	622.50	540	(3)	...	685.70
2000 .....	252,370	5.0	5.0	894.40	143,370	5.0	5.0	1,014.40	109,000	5.0	5.0	736.40
1999 .....	426,550	8.5	13.5	842.20	230,040	8.1	13.1	959.90	196,510	9.0	14.0	704.40
1998 .....	449,900	8.9	22.4	813.60	240,530	8.4	21.5	929.20	209,370	9.6	23.6	680.70
1997 .....	427,160	8.5	30.9	795.10	227,610	8.0	29.5	907.60	199,550	9.2	32.8	666.80
1996 .....	404,590	8.0	38.9	789.00	217,260	7.6	37.1	904.10	187,330	8.6	41.4	655.60
1995 .....	373,650	7.4	46.4	792.20	199,440	7.0	44.0	904.20	174,210	8.0	49.4	664.00
1994 .....	357,840	7.1	53.5	785.60	192,650	6.7	50.8	898.80	165,190	7.6	57.0	653.70
1993 .....	328,190	6.5	60.0	766.00	180,130	6.3	57.1	873.30	148,060	6.8	63.8	635.40
1992 .....	310,290	6.2	66.1	754.00	174,260	6.1	63.2	849.40	136,030	6.2	70.0	631.70
1991 .....	282,430	5.6	71.7	747.70	161,110	5.6	68.8	837.80	121,320	5.6	75.6	628.10
1990 .....	226,080	4.5	76.2	752.10	130,990	4.6	73.4	839.70	95,090	4.4	79.9	631.50
1989 .....	168,840	3.4	79.6	754.10	98,150	3.4	76.9	840.10	70,690	3.2	83.2	634.70
1988 .....	136,880	2.7	82.3	759.50	81,290	2.8	79.7	846.00	55,590	2.6	85.7	633.10
1987 .....	115,650	2.3	84.6	753.00	70,040	2.5	82.1	833.90	45,610	2.1	87.8	628.70
1986 .....	105,370	2.1	86.7	728.40	64,810	2.3	84.4	802.20	40,560	1.9	89.7	610.30
1985 .....	92,280	1.8	88.5	708.90	58,070	2.0	86.4	772.80	34,210	1.6	91.3	600.60
1984 .....	80,860	1.6	90.1	694.30	51,840	1.8	88.3	752.60	29,020	1.3	92.6	590.30
1983 .....	64,590	1.3	91.4	695.80	42,660	1.5	89.8	747.00	21,930	1.0	93.6	596.20
1982 .....	52,990	1.1	92.5	698.90	34,960	1.2	91.0	751.30	18,030	.8	94.4	597.40
1981 .....	43,820	.9	93.3	730.30	29,130	1.0	92.0	784.20	14,690	.7	95.1	623.60
1980 .....	44,180	.9	94.2	773.10	29,680	1.0	93.0	827.70	14,500	.7	95.8	661.40
1979 .....	39,980	.8	95.0	882.10	26,770	.9	94.0	941.10	13,210	.6	96.4	762.60
1978 .....	36,430	.7	95.7	953.10	24,460	.9	94.8	1,005.10	11,970	.5	96.9	846.90
1977 .....	34,890	.7	96.4	921.70	23,030	.8	95.6	984.20	11,860	.5	97.5	800.40
1976 .....	35,930	.7	97.1	886.80	24,320	.9	96.5	939.50	11,610	.5	98.0	776.40
1975 .....	31,400	.6	97.8	835.80	21,540	.8	97.2	877.20	9,860	.5	98.4	745.60
1974 .....	26,550	.5	98.3	816.10	18,040	.6	97.9	851.50	8,510	.4	98.8	741.00
1973 .....	22,250	.4	98.7	772.60	14,770	.5	98.4	809.00	7,480	.3	99.2	700.80
1972 .....	15,160	.3	99.0	773.80	10,530	.4	98.8	805.20	4,630	.2	99.4	702.30
1971 .....	13,330	.3	99.3	764.30	9,450	.3	99.1	782.40	3,880	.2	99.6	720.10
1970 .....	10,520	.2	99.5	720.20	7,580	.3	99.4	734.50	2,940	.1	99.7	683.50
1969 .....	7,970	.2	99.7	672.40	5,850	.2	99.6	680.20	2,120	.1	99.8	651.10
1968 .....	10,060	.2	99.9	628.90	7,440	.3	99.8	640.50	2,620	.1	99.9	596.00
1967 .....	2,490	(3)	99.9	706.10	1,930	.1	99.9	722.00	560	(3)	99.9	651.50
1966 .....	1,320	(3)	99.9	670.70	950	(3)	99.9	682.10	370	(3)	100.0	641.20
1965 .....	1,110	(3)	100.0	669.90	790	(3)	100.0	662.10	320	(3)	100.0	689.30

<sup>1</sup> Provisions for Railroad Retirement beneficiaries are described in the section Social Security (Old-Age, Survivors, and Disability Insurance).

<sup>2</sup> Represents those entitled in specified year or later.

<sup>3</sup> Less than 0.05 percent.



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

Table 5.D2.—Number and percentage distribution, by monthly benefit and sex, December 2000<sup>1</sup>

[Based on 10-percent sample]

Monthly benefit	Total		Men		Women	
	Number	Percent	Number	Percent	Number	Percent
Total .....	5,035,840	100.0	2,856,870	100.0	2,178,970	100.0
Less than \$300.00 .....	218,230	4.3	71,270	2.5	146,960	6.7
\$300.00–\$349.90 .....	108,500	2.2	37,750	1.3	70,750	3.2
\$350.00–\$399.90 .....	113,190	2.2	39,830	1.4	73,360	3.4
\$400.00–\$449.90 .....	166,760	3.3	60,000	2.1	106,760	4.9
\$450.00–\$499.90 .....	329,560	6.5	119,940	4.2	209,620	9.6
\$500.00–\$549.90 .....	355,760	7.1	142,280	5.0	213,480	9.8
\$550.00–\$599.90 .....	349,680	6.9	151,030	5.3	198,650	9.1
\$600.00–\$649.90 .....	342,960	6.8	161,170	5.6	181,790	8.3
\$650.00–\$699.90 .....	318,460	6.3	159,040	5.6	159,420	7.3
\$700.00–\$749.90 .....	292,130	5.8	154,710	5.4	137,420	6.3
\$750.00–\$799.90 .....	269,820	5.4	152,120	5.3	117,700	5.4
\$800.00–\$849.90 .....	245,140	4.9	146,060	5.1	99,080	4.5
\$850.00–\$899.90 .....	229,330	4.6	144,520	5.1	84,810	3.9
\$900.00–\$949.90 .....	205,620	4.1	135,970	4.8	69,650	3.2
\$950.00–\$999.90 .....	190,040	3.8	130,930	4.6	59,110	2.7
\$1,000.00–\$1,049.90 .....	171,550	3.4	123,010	4.3	48,540	2.2
\$1,050.00–\$1,099.90 .....	152,370	3.0	113,520	4.0	38,850	1.8
\$1,100.00–\$1,149.90 .....	138,500	2.8	106,910	3.7	31,590	1.4
\$1,150.00–\$1,199.90 .....	133,400	2.6	106,630	3.7	26,770	1.2
\$1,200.00–\$1,249.90 .....	142,960	2.8	117,030	4.1	25,930	1.2
\$1,250.00–\$1,299.90 .....	158,190	3.1	132,190	4.6	26,000	1.2
\$1,300.00 or more .....	403,690	8.0	350,960	12.3	52,730	2.4
<b>Average benefit .....</b>	<b>\$787.00</b>		<b>\$883.00</b>		<b>\$661.10</b>	

<sup>1</sup> Provisions for Railroad Retirement beneficiaries are described in the section Social Security (Old-Age, Survivors, and Disability Insurance).

Table 5.D3.—Number and monthly benefits, by sex, 1957–2000<sup>1</sup>

[Monthly benefits, in thousands]

December	Total		Men		Women	
	Number	Benefit	Number	Benefit	Number	Benefit
1957 .....	149,850	\$10,904	121,172	\$8,903	28,678	\$2,001
1958 .....	237,719	19,516	189,883	16,138	47,836	3,378
1959 .....	334,443	29,765	264,201	24,417	70,242	5,348
1960 .....	455,371	40,668	356,277	33,034	99,094	7,633
1965 .....	988,074	96,599	734,047	74,946	254,027	21,656
1970 .....	1,492,948	196,010	1,068,986	148,194	423,962	47,819
1975 .....	2,488,774	562,180	1,710,923	418,013	777,851	144,167
1980 .....	2,858,680	1,059,792	1,928,030	784,266	930,650	275,525
1981 .....	2,776,519	1,147,113	1,870,436	849,599	906,083	297,513
1982 .....	2,603,599	1,147,131	1,745,492	847,512	858,107	299,619
1983 .....	2,569,029	1,171,957	1,730,947	870,075	838,082	301,882
1984 .....	2,596,516	1,222,081	1,747,536	906,985	848,980	315,096
1985 .....	2,656,638	1,285,375	1,784,750	953,156	871,888	332,219
1986 .....	2,728,463	1,331,144	1,826,835	985,003	901,628	346,141
1987 .....	2,785,859	1,415,811	1,857,172	1,044,647	928,687	371,165
1988 .....	2,830,284	1,498,637	1,876,878	1,101,675	953,406	396,962
1989 .....	2,895,364	1,609,780	1,906,379	1,176,403	988,985	433,376
1990 .....	3,011,294	1,768,313	1,967,408	1,283,579	1,043,886	484,735
1991 .....	3,194,938	1,946,823	2,067,777	1,401,006	1,127,161	545,817
1992 .....	3,467,783	2,171,080	2,219,789	1,546,924	1,247,994	624,156
1993 .....	3,725,966	2,390,829	2,357,332	1,685,025	1,368,634	705,804
1994 .....	3,962,954	2,620,982	2,473,061	1,824,195	1,489,893	796,787
1995 .....	4,185,263	2,853,365	2,568,359	1,956,168	1,616,904	897,197
1996 .....	4,385,623	3,087,223	2,644,454	2,083,123	1,741,169	1,004,100
1997 .....	4,508,134	3,252,919	2,666,486	2,158,017	1,841,648	1,094,902
1998 .....	4,698,319	3,444,259	2,737,296	2,252,129	1,961,023	1,192,130
1999 .....	4,879,455	3,679,691	2,801,163	2,371,141	2,078,292	1,308,550
2000 .....	5,042,334	3,965,304	2,856,411	2,521,252	2,185,923	1,444,052

<sup>1</sup> Provisions for Railroad Retirement beneficiaries are described in the section Social Security (Old-Age, Survivors, and Disability Insurance).

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

Table 5.D4.—Number, average age, and percentage distribution, by age and sex, 1957–2000

December <sup>1</sup>	Total number <sup>2</sup> (in thousands)	Average age	Percentage distribution, by age							
			Total	Under 30	30–39	40–44	45–49	50–54	55–59	60–64
<b>Men</b>										
1957.....	121	59.4	100.0	...	...	...	...	18.5	29.9	51.6
1958.....	190	59.5	100.0	...	...	...	...	18.2	29.7	52.1
1959.....	264	59.3	100.0	...	...	...	...	19.0	30.7	50.3
1960.....	356	57.3	100.0	0.5	3.3	3.0	4.9	16.6	26.7	44.9
1965.....	734	54.4	100.0	1.0	7.5	7.6	10.4	15.4	24.7	33.3
1970.....	1,069	53.9	100.0	3.3	6.8	6.9	10.9	15.2	23.2	33.7
1975.....	1,711	53.5	100.0	4.6	7.5	6.2	9.7	15.8	23.2	33.0
1980.....	1,928	52.9	100.0	4.1	9.6	6.0	8.9	14.3	24.0	33.1
1982.....	1,746	53.2	100.0	4.0	9.7	5.8	7.8	13.6	23.6	35.5
1983.....	1,731	52.9	100.0	4.2	10.4	6.3	8.0	13.0	23.1	35.0
1984.....	1,748	52.5	100.0	4.4	11.3	6.8	8.3	12.8	22.2	34.2
1985.....	1,785	51.9	100.0	4.6	12.3	7.3	8.6	12.9	21.4	32.9
1986.....	1,827	51.4	100.0	4.9	13.3	7.9	8.9	12.7	20.7	31.5
1987.....	1,857	51.1	100.0	4.8	13.8	8.5	9.4	12.5	20.1	30.8
1988 <sup>3</sup> .....	1,869	50.9	100.0	4.7	14.3	9.0	9.8	12.7	19.6	29.9
1989.....	1,906	50.7	100.0	4.5	14.7	9.6	10.3	12.7	19.4	28.8
1990 <sup>3</sup> .....	1,965	50.4	100.0	4.5	15.2	10.3	10.7	12.7	19.1	27.5
1991 <sup>3</sup> .....	2,066	50.1	100.0	4.5	15.6	10.7	11.2	13.0	18.6	26.4
1992 <sup>3</sup> .....	2,221	49.9	100.0	4.6	16.0	11.0	12.0	13.4	18.0	25.0
1993 <sup>3</sup> .....	2,358	49.6	100.0	4.6	16.2	11.2	12.3	13.9	17.9	23.9
1994 <sup>3</sup> .....	2,476	49.6	100.0	4.3	16.1	11.4	12.8	14.2	17.8	23.4
1995 <sup>3</sup> .....	2,573	49.7	100.0	4.0	15.5	11.5	13.4	14.5	18.0	23.2
1996 <sup>3</sup> .....	2,650	49.9	100.0	3.6	14.8	11.6	13.7	15.0	18.3	22.9
1997 <sup>3</sup> .....	2,671	50.2	100.0	3.3	13.9	11.6	13.6	15.7	18.9	23.0
1998 <sup>3</sup> .....	2,741	50.5	100.0	3.1	13.3	11.6	13.7	16.1	19.4	22.9
1999 <sup>3</sup> .....	2,802	50.6	100.0	2.9	12.6	11.6	13.8	16.7	19.7	22.9
2000 <sup>3</sup> .....	2,857	50.7	100.0	2.8	11.8	11.5	13.9	17.3	20.0	22.8
<b>Women</b>										
1957.....	29	57.9	100.0	...	...	...	...	25.6	39.2	35.2
1958.....	48	58.2	100.0	...	...	...	...	23.8	37.5	38.6
1959.....	70	58.4	100.0	...	...	...	...	23.4	36.8	39.7
1960.....	99	56.7	100.0	0.3	3.2	3.2	5.3	19.4	31.4	37.2
1965.....	254	55.2	100.0	.6	5.4	6.3	9.8	16.2	27.3	34.3
1970.....	424	55.0	100.0	1.9	5.1	5.6	10.1	15.9	26.0	35.3
1975.....	778	54.4	100.0	3.3	6.1	5.3	9.0	16.3	25.5	34.5
1980.....	931	53.7	100.0	3.4	8.2	5.3	8.2	14.4	25.4	35.0
1982.....	858	53.9	100.0	3.3	8.5	5.1	7.2	13.7	25.2	37.0
1983.....	838	53.6	100.0	3.5	9.3	5.7	7.5	12.9	24.3	36.8
1984.....	849	53.2	100.0	3.7	10.2	6.3	7.8	12.8	23.2	36.0
1985.....	872	52.6	100.0	3.8	11.2	6.9	8.3	12.9	22.3	34.6
1986.....	902	52.0	100.0	4.1	12.1	7.6	8.8	12.9	21.6	32.9
1987.....	929	51.7	100.0	4.2	12.7	8.2	9.4	12.9	20.9	31.7
1988 <sup>3</sup> .....	952	51.4	100.0	4.0	13.1	8.7	9.9	13.2	20.6	30.5
1989.....	989	51.1	100.0	4.0	13.5	9.2	10.6	13.4	20.1	29.2
1990 <sup>3</sup> .....	1,046	50.8	100.0	3.9	14.0	9.8	11.1	13.4	19.9	27.9
1991 <sup>3</sup> .....	1,133	50.5	100.0	4.0	14.3	10.3	11.6	13.8	19.4	26.5
1992 <sup>3</sup> .....	1,252	50.1	100.0	4.3	14.6	10.7	12.2	14.3	18.8	25.0
1993 <sup>3</sup> .....	1,371	49.9	100.0	4.3	14.9	11.0	12.6	14.8	18.9	23.5
1994 <sup>3</sup> .....	1,491	49.9	100.0	4.1	14.8	11.2	13.1	15.3	18.7	22.8
1995 <sup>3</sup> .....	1,614	49.9	100.0	3.8	14.5	11.5	13.6	15.7	18.8	22.2
1996 <sup>3</sup> .....	1,736	50.0	100.0	3.4	14.1	11.6	13.9	16.2	19.0	21.7
1997 <sup>3</sup> .....	1,835	50.2	100.0	3.1	13.3	11.6	14.0	16.8	19.6	21.5
1998 <sup>3</sup> .....	1,956	50.5	100.0	3.0	12.8	11.5	14.2	17.0	20.0	21.6
1999 <sup>3</sup> .....	2,071	50.5	100.0	2.8	12.1	11.5	14.3	17.5	20.4	21.5
2000 <sup>3</sup> .....	2,179	50.7	100.0	2.7	11.5	11.3	14.5	17.9	20.7	21.5

<sup>1</sup> Data not available for 1981.

<sup>2</sup> Provisions for Railroad Retirement beneficiaries are described in the section Social Security (Old-Age, Survivors, and Disability Insurance).

<sup>3</sup> Based on 10-percent sample.

5.D OASDI Current-Pay Benefits: Disabled Workers

Table 5.D4.1.—Number and percentage distribution of disabled beneficiaries, by type of beneficiary and diagnostic group, December 2000

Diagnostic group	Total	Disabled workers	Disabled children, aged 18 or older	Disabled widows and widowers
Number				
Total .....	5,972,468	5,042,333	728,689	201,446
Diagnosis available.....	5,652,157	4,959,682	<sup>1</sup> 495,904	196,571
Infectious and parasitic diseases <sup>2</sup> .....	102,391	97,919	2,795	1,677
Neoplasms .....	142,375	136,404	1,746	4,225
Endocrine, nutritional, and metabolic diseases .....	267,826	244,456	2,753	20,617
Diseases of blood and blood-forming organs .....	14,132	12,070	1,713	349
Mental disorders (other than mental retardation) .....	1,486,022	1,361,157	83,593	41,272
Mental retardation .....	567,151	257,601	299,925	9,625
Diseases of the—				
Nervous system and sense organs .....	550,741	479,246	57,679	13,816
Circulatory system .....	559,027	532,998	2,992	23,037
Respiratory system .....	178,279	166,054	891	11,334
Digestive system .....	72,345	69,735	501	2,109
Genitourinary system .....	88,069	84,687	1,671	1,711
Skin and subcutaneous tissue .....	13,103	12,351	237	515
Musculoskeletal system .....	1,207,914	1,152,231	4,090	51,593
Congenital anomalies .....	14,641	8,540	5,838	263
Injuries .....	244,231	231,066	8,124	5,041
Other .....	143,910	113,167	21,356	9,387
Percentage distribution				
Diagnosis available.....	100.0	100.0	100.0	100.0
Infectious and parasitic diseases <sup>2</sup> .....	1.8	2.0	.6	.9
Neoplasms .....	2.5	2.8	.4	2.1
Endocrine, nutritional, and metabolic diseases .....	4.7	4.9	.6	10.5
Diseases of blood and blood-forming organs .....	.3	.2	.3	.2
Mental disorders (other than mental retardation) .....	26.3	27.4	16.9	21.0
Mental retardation .....	10.0	5.2	60.5	4.9
Diseases of the—				
Nervous system and sense organs .....	9.7	9.7	11.6	7.0
Circulatory system .....	9.9	10.7	.6	11.7
Respiratory system .....	3.2	3.3	.2	5.8
Digestive system .....	1.3	1.4	.1	1.1
Genitourinary system .....	1.6	1.7	.3	.9
Skin and subcutaneous tissue .....	.2	.2	(3)	.3
Musculoskeletal system .....	21.4	23.2	.8	26.2
Congenital anomalies .....	.3	.2	1.2	.1
Injuries .....	4.3	4.7	1.6	2.6
Other .....	2.5	2.3	4.3	4.8

<sup>1</sup> The diagnosis for disabled children typically was not recorded on the Master Beneficiary Record (MBR) until 1984. Many beneficiaries entitled before that date are still on the rolls today.

<sup>2</sup> AIDS/HIV records are counted in the Infectious and Parasitic Diseases group. Before 1990, those records were included in the Other group.

<sup>3</sup> Less than 0.05 percent

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

Table 5.D5.—Number and percentage distribution, by diagnostic group, and sex, December 2000

Diagnostic group	Number			Percentage distribution		
	Total	Men	Women	Total	Men	Women
Total .....	5,042,333	2,856,410	2,185,923	...	...	...
Diagnosis available .....	4,959,682	2,799,719	2,159,963	100.0	100.0	100.0
Infectious and parasitic diseases <sup>1</sup> .....	97,919	75,065	22,854	2.0	2.7	1.1
Neoplasms .....	136,404	67,303	69,101	2.8	2.4	3.2
Endocrine, nutritional, and metabolic diseases .....	244,456	99,459	144,997	4.9	3.6	6.7
Diseases of blood and blood-forming organs .....	12,070	5,799	6,271	.2	.2	.3
Mental disorders (other than mental retardation) .....	1,361,157	729,135	632,022	27.4	26.0	29.3
Mental retardation .....	257,601	173,193	84,408	5.2	6.2	3.9
Diseases of the—						
Nervous system and sense organs .....	479,246	249,625	229,621	9.7	8.9	10.6
Circulatory system .....	532,998	366,900	166,098	10.7	13.1	7.7
Respiratory system .....	166,054	87,706	78,348	3.3	3.1	3.6
Digestive system .....	69,735	38,425	31,310	1.4	1.4	1.4
Genitourinary system .....	84,687	51,597	33,090	1.7	1.8	1.5
Skin and subcutaneous tissue .....	12,351	5,141	7,210	.2	.2	.3
Musculoskeletal system .....	1,152,231	623,017	529,214	23.2	22.3	24.5
Congenital anomalies .....	8,540	4,565	3,975	.2	.2	.2
Injuries .....	231,066	166,364	64,702	4.7	5.9	3.0
Other .....	113,167	56,425	56,742	2.3	2.0	2.6

<sup>1</sup> AIDS/HIV records are counted in the Infectious and Parasitic Diseases group. Before 1990, these records were included in the Other group.

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

Table 5.D6.—Number and percentage distribution, by diagnostic group, age, and sex, December 2000

Diagnostic group	Total	Age						
		Under 30	30–39	40–44	45–49	50–54	55–59	60–64
Total								
Total .....	5,042,333	137,359	591,894	572,784	710,578	886,202	1,021,533	1,121,983
Diagnosis available, number .....	4,959,682	136,763	589,977	566,904	698,376	870,218	1,005,155	1,092,289
Diagnosis available, percentage distribution .....	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0
Infectious and parasitic diseases <sup>1</sup> .....	2.0	1.6	4.4	3.5	2.5	1.6	1.0	.8
Neoplasms .....	2.8	2.6	1.9	2.0	2.4	2.8	3.2	3.4
Endocrine, nutritional, and metabolic diseases .....	4.9	2.4	3.4	4.1	4.9	5.7	5.7	5.2
Diseases of blood and blood-forming organs .....	.2	.9	.4	.3	.2	.2	.2	.1
Mental disorders (other than mental retardation) .....	27.4	41.0	39.3	37.7	34.7	29.7	20.2	14.2
Mental retardation .....	5.2	17.5	11.2	7.6	5.9	4.0	2.7	1.9
Diseases of the—								
Nervous system and sense organs .....	9.7	12.1	11.3	10.5	10.5	9.8	8.9	8.1
Circulatory system .....	10.7	2.0	2.7	4.0	6.2	9.8	15.1	19.4
Respiratory system .....	3.3	.8	1.0	1.3	1.8	2.8	4.8	6.1
Digestive system .....	1.4	1.1	1.2	1.6	1.8	1.6	1.3	1.2
Genitourinary system .....	1.7	3.1	2.4	2.0	2.0	1.7	1.4	1.1
Skin and subcutaneous tissue .....	.2	.2	.3	.3	.3	.3	.2	.2
Musculoskeletal system .....	23.2	4.7	11.7	17.1	19.6	23.1	29.3	31.9
Congenital anomalies .....	.2	.6	.3	.2	.2	.1	.1	.1
Injuries .....	4.7	7.5	6.3	5.4	4.6	4.2	3.9	4.2
Other .....	2.3	1.9	2.2	2.4	2.4	2.5	2.2	2.1
Men								
Total .....	2,856,410	79,273	337,287	325,942	398,007	494,668	569,900	651,333
Diagnosis available, number .....	2,799,719	78,914	336,076	321,742	389,348	483,288	558,786	631,565
Diagnosis available, percentage distribution .....	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0
Infectious and parasitic diseases <sup>1</sup> .....	2.7	1.9	6.5	5.1	3.6	2.0	1.1	.8
Neoplasms .....	2.4	2.5	1.6	1.6	1.9	2.3	2.8	3.3
Endocrine, nutritional, and metabolic diseases .....	3.6	1.7	2.6	3.1	3.6	4.0	4.1	3.7
Diseases of blood and blood-forming organs .....	.2	.8	.4	.2	.2	.2	.1	.1
Mental disorders (other than mental retardation) .....	26.0	41.6	38.0	36.1	33.3	29.3	18.5	12.4
Mental retardation .....	6.2	18.4	12.9	9.1	7.2	5.0	3.4	2.3
Diseases of the—								
Nervous system and sense organs .....	8.9	11.2	9.9	9.3	9.4	9.0	8.5	7.9
Circulatory system .....	13.1	2.0	2.7	4.4	7.3	11.9	18.9	23.9
Respiratory system .....	3.1	.5	.7	1.0	1.5	2.5	4.6	6.1
Digestive system .....	1.4	.7	.9	1.5	1.9	1.6	1.3	1.2
Genitourinary system .....	1.8	3.1	2.5	2.2	2.2	1.9	1.5	1.2
Skin and subcutaneous tissue .....	.2	.1	.2	.2	.2	.2	.2	.2
Musculoskeletal system .....	22.3	3.3	10.7	17.0	19.6	22.2	28.1	30.0
Congenital anomalies .....	.2	.5	.2	.2	.2	.1	.1	.1
Injuries .....	5.9	9.9	8.3	7.2	6.0	5.5	4.9	4.8
Other .....	2.0	1.8	1.9	2.0	2.0	2.2	2.0	2.0
Women								
Total .....	2,185,923	58,086	254,607	246,842	312,571	391,534	451,633	470,650
Diagnosis available, number .....	2,159,963	57,849	253,901	245,162	309,028	386,930	446,369	460,724
Diagnosis available, percentage distribution .....	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0
Infectious and parasitic diseases <sup>1</sup> .....	1.1	1.3	1.7	1.4	1.2	1.0	.8	.7
Neoplasms .....	3.2	2.7	2.3	2.6	3.0	3.4	3.6	3.7
Endocrine, nutritional, and metabolic diseases .....	6.7	3.2	4.4	5.4	6.6	7.8	7.7	7.3
Diseases of blood and blood-forming organs .....	.3	1.1	.5	.4	.3	.2	.2	.2
Mental disorders (other than mental retardation) .....	29.3	40.2	41.1	40.0	36.5	30.2	22.3	16.7
Mental retardation .....	3.9	16.3	9.0	5.6	4.3	2.8	1.8	1.3
Diseases of the—								
Nervous system and sense organs .....	10.6	13.2	13.1	12.1	11.8	10.8	9.5	8.3
Circulatory system .....	7.7	2.2	2.6	3.5	4.8	7.2	10.4	13.2
Respiratory system .....	3.6	1.2	1.4	1.7	2.2	3.3	5.0	6.1
Digestive system .....	1.4	1.5	1.6	1.7	1.7	1.5	1.3	1.2
Genitourinary system .....	1.5	3.1	2.3	1.8	1.7	1.5	1.2	1.0
Skin and subcutaneous tissue .....	.3	.4	.4	.4	.4	.3	.3	.3
Musculoskeletal system .....	24.5	6.6	12.9	17.3	19.7	24.2	30.7	34.4
Congenital anomalies .....	.2	.7	.3	.2	.2	.1	.1	.1
Injuries .....	3.0	4.3	3.7	3.1	2.7	2.6	2.6	3.3
Other .....	2.6	2.1	2.7	2.9	2.9	2.8	2.5	2.3

<sup>1</sup> AIDS/HIV records are counted in the Infectious and Parasitic Diseases group. Before 1990, these records were included in the Other group.

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

Table 5.E1.—Number and percentage distribution, by type of benefit and primary insurance amount, December 2000

[Based on 10-percent sample]

Primary insurance amount	Disabled workers		Wives and husbands		Children	
	Number	Percent	Number	Percent	Number	Percent
Total .....	5,035,840	100.0	164,850	100.0	1,474,590	100.0
Less than \$300.00 .....	202,440	4.0	50	(1)	490	(1)
\$300.00–\$349.90 .....	111,670	2.2	250	.2	2,020	.1
\$350.00–\$399.90 .....	109,450	2.2	100	.1	1,020	.1
\$400.00–\$449.90 .....	163,270	3.2	510	.3	5,470	.4
\$450.00–\$499.90 .....	333,210	6.6	4,480	2.7	76,720	5.2
\$500.00–\$549.90 .....	355,830	7.1	7,630	4.6	119,070	8.1
\$550.00–\$599.90 .....	347,610	6.9	9,090	5.5	125,040	8.5
\$600.00–\$649.90 .....	339,060	6.7	8,900	5.4	124,180	8.4
\$650.00–\$699.90 .....	315,500	6.3	10,170	6.2	118,620	8.0
\$700.00–\$749.90 .....	290,270	5.8	9,090	5.5	108,490	7.4
\$750.00–\$799.90 .....	269,730	5.4	9,660	5.9	102,110	6.9
\$800.00–\$849.90 .....	245,120	4.9	8,960	5.4	90,890	6.2
\$850.00–\$899.90 .....	229,160	4.6	8,580	5.2	83,900	5.7
\$900.00–\$949.90 .....	205,730	4.1	8,290	5.0	72,440	4.9
\$950.00–\$999.90 .....	191,100	3.8	7,600	4.6	63,820	4.3
\$1,000.00–\$1,049.90 .....	173,200	3.4	7,480	4.5	56,460	3.8
\$1,050.00–\$1,099.90 .....	154,810	3.1	7,090	4.3	47,780	3.2
\$1,100.00–\$1,149.90 .....	141,010	2.8	6,960	4.2	39,810	2.7
\$1,150.00–\$1,199.90 .....	135,500	2.7	7,080	4.3	37,420	2.5
\$1,200.00–\$1,249.90 .....	146,160	2.9	7,720	4.7	39,400	2.7
\$1,250.00–\$1,299.90 .....	162,080	3.2	9,630	5.8	42,840	2.9
\$1,300.00 or more .....	413,930	8.2	25,530	15.5	116,600	7.9
<b>Average primary insurance amount .....</b>		<b>\$792.30</b>		<b>\$953.70</b>		<b>\$836.50</b>

<sup>1</sup> Less than 0.05 percent.

Table 5.E2.—Average monthly benefit, by type of benefit, age, and sex, 1957–2000

December	Disabled workers			Wives	Husbands	Children			
	Total	Men	Women			Total	Under age 18	Disabled, aged 18 or older	Students
1957 .....	\$72.80	\$73.50	\$69.80	...	...	...	...	...	...
1958 .....	82.10	85.00	70.60	\$34.00	\$33.90	\$27.30	\$27.30	\$38.50	...
1959 .....	89.00	92.40	76.10	36.10	34.70	31.00	30.80	39.40	...
1960 .....	89.30	92.70	77.00	34.40	34.70	30.20	30.00	39.00	...
1965 .....	97.80	102.10	85.30	35.00	32.60	31.60	30.90	41.60	\$49.30
1970 .....	131.30	138.60	112.80	42.60	42.40	38.60	36.90	53.30	54.10
1975 .....	225.90	244.30	185.30	67.40	61.70	62.00	58.60	84.10	86.90
1980 .....	370.70	406.80	296.10	110.60	91.80	110.30	104.60	136.00	152.40
1981 .....	413.20	454.20	328.40	121.70	100.10	134.40	115.60	151.90	172.90
1982 .....	440.60	485.60	349.20	129.40	101.70	127.90	124.30	163.90	155.50
1983 .....	456.20	502.70	360.20	129.30	101.50	135.50	133.80	172.00	144.00
1984 .....	470.70	519.00	371.40	131.10	101.10	138.50	136.60	178.60	149.80
1985 .....	483.80	534.10	381.00	132.70	102.70	141.80	138.90	183.80	196.90
1986 .....	487.90	539.20	383.90	131.40	101.20	141.40	138.40	186.70	201.60
1987 .....	508.20	562.50	399.70	135.80	86.10	146.40	143.00	195.70	213.40
1988 .....	529.50	587.00	416.40	139.70	86.60	150.90	146.70	205.00	228.00
1989 .....	556.00	617.10	438.20	145.50	91.50	156.70	151.90	218.20	240.60
1990 .....	587.20	652.40	464.40	151.30	96.90	163.80	158.80	231.40	250.00
1991 .....	609.40	677.50	484.20	154.60	101.70	167.90	162.70	240.90	253.20
1992 .....	626.10	696.90	500.10	156.40	106.00	170.20	165.10	246.80	262.00
1993 .....	641.70	714.80	515.70	157.50	108.60	173.10	167.70	253.30	265.90
1994 .....	661.40	731.60	534.80	161.00	112.60	177.70	172.20	261.50	273.80
1995 .....	681.80	761.60	554.90	165.00	116.60	183.50	177.90	270.10	284.10
1996 .....	703.90	787.70	576.70	172.60	124.50	193.50	187.70	281.70	295.00
1997 .....	721.60	809.30	594.50	178.00	129.10	201.20	195.20	292.20	306.30
1998 .....	733.10	822.80	607.90	183.00	136.50	207.50	201.40	300.20	313.10
1999 .....	754.10	846.50	629.60	190.20	145.40	216.10	209.50	310.70	319.80
2000 .....	786.40	882.70	660.60	199.50	155.90	227.60	220.80	325.60	336.00

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

Table 5.F1.—Number of **wives and husbands** and total monthly benefit, by type of benefit, 1950–2000

[Dollars, in thousands]

December	Total		Wives entitled solely because of age <sup>1</sup>		Wives entitled because of children <sup>2</sup>						Husbands	
					Total		With at least 1 child under age 16 <sup>3</sup>		With at least 1 disabled child <sup>4</sup>			
	Number	Benefit	Number	Benefit	Number	Benefit	Number	Benefit	Number	Benefit	Number	Benefit
<b>Wives and husbands of retired workers</b>												
1950.....	508,350	\$11,995	498,688	\$11,865	8,865	\$114	8,865	\$114	...	...	797	\$16
1955.....	1,191,963	39,416	1,124,616	37,826	57,284	1,315	57,284	1,315	...	...	10,063	274
1960.....	2,269,384	87,867	2,143,949	84,018	110,909	3,344	101,774	3,010	9,135	\$334	14,526	504
1965.....	2,613,550	114,035	2,433,602	108,069	168,951	5,508	154,829	4,947	14,122	561	10,997	458
1970.....	2,668,105	163,263	2,491,724	155,510	167,968	7,261	154,919	6,542	13,049	719	8,413	492
1975.....	2,867,388	301,623	2,664,132	287,043	195,993	13,861	178,909	12,391	17,084	1,470	7,263	720
1980.....	3,015,549	518,500	2,789,472	490,818	186,894	22,508	167,793	19,708	19,101	2,800	39,183	5,174
1981.....	3,030,815	590,266	2,805,274	558,805	186,982	25,834	167,895	22,659	19,087	3,175	38,559	5,627
1982.....	3,039,308	645,814	2,838,541	615,677	162,865	24,226	144,245	20,867	18,620	3,359	37,902	5,912
1983.....	3,039,178	679,886	2,885,724	662,255	116,159	17,569	95,901	13,769	20,258	3,799	37,295	6,002
1984.....	3,050,817	721,148	2,903,112	697,676	111,332	17,441	88,576	13,050	22,756	4,391	36,373	6,031
1985.....	3,069,067	755,844	2,926,300	732,464	107,166	17,347	84,074	12,762	23,092	4,585	35,601	6,033
1986.....	3,086,091	776,870	2,948,854	754,026	102,549	16,933	79,471	12,304	23,078	4,629	34,688	5,911
1987.....	3,089,968	817,058	2,959,301	794,258	96,928	16,865	74,141	12,078	22,787	4,788	33,739	5,935
1988.....	3,086,022	854,644	2,959,856	831,659	93,577	17,071	71,585	12,266	21,992	4,805	32,589	5,914
1989.....	3,093,075	905,281	2,971,440	881,836	89,839	17,431	68,857	12,571	20,982	4,859	31,796	6,014
1990.....	3,101,085	964,983	2,982,034	940,514	87,925	18,300	67,785	13,322	20,140	4,977	31,126	6,169
1991.....	3,104,235	1,008,672	2,986,975	983,434	86,682	19,020	66,992	13,897	19,690	5,122	30,578	6,218
1992.....	3,111,515	1,047,553	2,995,629	1,021,616	85,680	19,648	66,618	14,468	19,062	5,180	30,206	6,289
1993.....	3,094,447	1,075,073	2,980,671	1,048,712	83,751	19,993	65,225	14,782	18,526	5,211	30,025	6,368
1994.....	3,066,430	1,101,203	2,954,950	1,074,452	81,644	20,296	63,575	15,033	18,069	5,263	29,836	6,455
1995.....	3,026,012	1,120,924	2,917,764	1,094,203	78,507	20,155	61,132	14,932	17,375	5,223	29,741	6,567
1996.....	2,970,226	1,139,092	2,872,316	1,113,470	68,310	18,942	52,384	13,874	15,926	5,068	29,600	6,680
1997.....	2,922,170	1,148,558	2,828,261	1,123,381	64,123	18,363	49,372	13,540	14,751	4,823	29,786	6,814
1998.....	2,864,230	1,145,353	2,773,583	1,120,553	60,634	17,883	46,649	13,205	13,985	4,678	30,013	6,917
1999.....	2,811,008	1,155,479	2,722,244	1,130,413	58,229	17,905	45,002	13,333	13,227	4,572	30,535	7,161
2000.....	2,798,203	1,200,835	2,707,444	1,173,771	58,416	19,212	45,680	14,547	12,736	4,665	32,343	7,851
<b>Wives and husbands of disabled workers</b>												
1958.....	12,231	\$415	4,845	\$192	7,370	\$223	7,345	\$222	25	\$1	16	\$1
1960.....	76,599	2,636	21,845	841	54,543	1,788	53,549	1,746	994	42	211	7
1965.....	193,362	6,761	29,352	1,109	163,500	5,635	160,922	5,512	2,578	123	510	17
1970.....	283,447	12,060	41,582	2,063	241,341	9,975	235,892	9,667	5,449	307	524	22
1975.....	452,922	30,536	64,883	5,263	387,474	25,239	380,763	24,633	6,711	606	565	35
1980.....	461,878	51,028	77,276	9,672	382,457	41,159	374,147	40,018	8,310	1,142	2,145	197
1981.....	428,212	52,081	74,403	10,226	351,820	41,655	343,718	40,419	8,102	1,237	1,989	199
1982.....	365,862	47,286	75,708	11,135	288,323	35,965	281,423	34,854	6,900	1,111	1,831	186
1983.....	308,059	39,793	78,843	11,882	227,523	27,739	220,127	26,545	7,396	1,194	1,693	172
1984.....	303,982	39,796	79,437	12,320	222,959	27,316	213,530	25,782	9,429	1,533	1,586	160
1985.....	305,532	40,507	79,294	12,693	224,704	27,656	215,012	26,055	9,692	1,602	1,534	158
1986.....	300,826	39,481	78,925	12,766	220,426	26,566	210,515	24,952	9,911	1,614	1,475	149
1987.....	290,888	39,195	73,484	12,808	211,222	25,854	201,280	24,194	9,942	1,661	6,182	532
1988.....	280,821	38,878	70,654	12,924	203,788	25,402	194,068	23,746	9,720	1,656	6,379	552
1989.....	271,488	39,148	67,154	12,974	197,946	25,590	188,562	23,916	9,384	1,674	6,388	584
1990.....	265,890	39,869	63,584	13,018	195,818	26,222	186,641	24,506	9,177	1,716	6,488	629
1991.....	266,219	40,792	60,866	13,020	198,457	27,071	189,401	25,321	9,056	1,750	6,896	701
1992.....	270,674	41,951	59,536	13,196	203,703	27,967	194,459	26,152	9,244	1,815	7,435	788
1993.....	272,759	42,570	58,052	13,241	206,975	28,490	197,589	26,616	9,386	1,874	7,732	839
1994.....	271,054	43,263	56,343	13,367	206,854	29,011	197,492	27,094	9,362	1,917	7,857	885
1995.....	263,539	43,105	53,882	13,300	201,827	28,892	192,573	26,962	9,254	1,929	7,830	913
1996.....	223,854	38,366	51,779	13,251	166,586	24,432	158,106	22,597	8,480	1,834	5,489	683
1997.....	206,959	36,585	51,265	13,251	150,647	22,683	142,717	20,928	7,930	1,755	5,047	651
1998.....	189,843	34,530	50,759	13,197	134,584	20,718	127,083	19,032	7,501	1,686	4,500	614
1999.....	176,299	33,336	50,165	13,314	121,906	19,407	114,842	17,781	7,064	1,626	4,228	615
2000.....	165,123	32,763	49,171	13,488	111,933	18,649	105,248	17,044	6,685	1,605	4,019	626

<sup>1</sup> Aged 62 or older. Includes wives aged 65 or older with children.

<sup>2</sup> Under age 65 with entitled children in their care.

<sup>3</sup> Prior to August 1981, benefits were payable to mothers and fathers caring for a child under age 18. For mothers and fathers caring for a child who was at least 14 and who were entitled in August 1981, benefits were continued until the child attained age 18 or September 1983, whichever came earlier.

<sup>4</sup> Excludes wives with both disabled and nondisabled children in their care.

CONTACT: Rona Blumenthal/Dana Nichelle Mercer (410) 965-0163/966-6377 for further information.

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

Table 5.F3.—Number and percentage distribution of **wives** with entitlement based on age, by monthly benefit and age, December 2000

[Based on 10-percent sample]

Monthly benefit	Total	Age attained during 2000					
		62–64	65–69	70–74	75–79	80–84	85 or older
Total number .....	2,759,190	336,740	767,870	732,410	540,440	269,220	112,510
Total percent .....	100.0	100.0	100.0	100.0	100.0	100.0	100.0
Less than \$150.00 .....	5.7	10.2	6.3	4.8	4.6	4.3	3.9
\$150.00–\$174.90 .....	1.8	2.1	1.7	1.6	1.7	1.7	2.2
\$175.00–\$199.90 .....	2.1	2.6	2.3	2.0	2.0	1.8	1.7
\$200.00–\$224.90 .....	2.3	2.7	2.3	2.2	2.2	1.9	2.2
\$225.00–\$249.90 .....	2.6	2.8	2.6	2.5	2.6	2.5	2.7
\$250.00–\$274.90 .....	2.7	3.1	2.8	2.6	2.6	2.4	2.7
\$275.00–\$299.90 .....	2.9	3.2	2.9	2.9	3.0	2.7	3.0
\$300.00–\$324.90 .....	3.3	3.5	3.2	3.1	3.4	3.1	3.5
\$325.00–\$349.90 .....	3.7	3.7	3.6	3.7	3.7	3.8	4.4
\$350.00–\$374.90 .....	4.2	4.1	3.8	4.1	4.2	4.8	6.6
\$375.00–\$399.90 .....	5.0	4.2	4.4	4.9	5.6	5.7	6.8
\$400.00–\$424.90 .....	6.5	5.0	5.1	6.4	9.0	6.9	6.8
\$425.00–\$449.90 .....	8.1	5.6	6.2	9.1	12.1	7.3	5.7
\$450.00–\$474.90 .....	9.1	7.4	9.0	11.6	8.5	7.5	4.4
\$475.00–\$499.90 .....	9.5	10.9	11.9	10.3	6.1	7.3	4.8
\$500.00–\$524.90 .....	6.5	10.4	8.6	5.1	4.2	5.4	4.1
\$525.00–\$549.90 .....	4.5	7.6	4.6	3.5	3.8	4.9	4.1
\$550.00–\$574.90 .....	3.5	4.3	3.0	3.1	3.5	4.6	4.3
\$575.00–\$599.90 .....	3.0	2.6	2.4	2.9	3.3	4.4	3.4
\$600.00–\$624.90 .....	2.7	1.5	2.4	2.7	3.4	3.6	3.4
\$625.00–\$649.90 .....	2.6	1.1	2.4	2.6	3.0	3.0	3.8
\$650.00 or more .....	7.9	1.4	8.5	8.2	7.5	10.4	15.4
<b>Average benefit .....</b>	<b>\$431.10</b>	<b>\$392.60</b>	<b>\$429.80</b>	<b>\$433.20</b>	<b>\$432.60</b>	<b>\$459.10</b>	<b>\$468.30</b>

CONTACT: Rona Blumenthal/Dana Nichelle Mercer (410) 965-0163/966-6377 for further information.



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

Table 5.F4.—Number of **children** and total monthly benefit, by type of benefit, 1940–2000

[Dollars, in thousands]

December	Number of children of—				Monthly benefit for children of—			
	All workers	Retired workers	Deceased workers	Disabled workers	All workers	Retired workers	Deceased workers	Disabled workers
	<b>Total</b>							
1957	1,502,077	179,697	1,322,380	...	\$57,951	\$3,932	\$54,019	...
1960	2,000,451	268,168	1,576,802	155,481	93,276	7,576	81,003	\$4,697
1965	3,092,659	460,781	2,074,263	557,615	159,428	14,736	127,067	17,627
1970	4,122,305	545,708	2,687,997	888,600	279,845	24,473	221,041	34,330
1980	4,606,517	638,711	2,609,920	1,357,886	864,242	89,386	625,090	149,766
1990	3,187,010	422,200	1,776,013	988,797	991,628	109,497	720,206	161,926
1995	3,734,097	441,600	1,883,643	1,408,854	1,283,288	141,974	882,837	258,477
1996	3,802,791	442,567	1,897,667	1,462,557	1,356,685	149,177	924,491	283,017
1997	3,771,774	441,121	1,892,707	1,437,946	1,389,552	153,949	946,325	289,278
1998	3,768,928	438,726	1,883,794	1,446,408	1,417,362	157,230	959,939	300,194
1999	3,794,795	442,016	1,884,803	1,467,976	1,473,988	164,755	991,963	317,270
2000	3,802,863	458,951	1,878,007	1,465,905	1,547,808	181,177	1,033,055	333,575
	<b>Children under age 18</b>							
1940	54,648	6,410	48,238	...	\$668	\$62	\$606	...
1950	699,703	46,241	653,462	...	19,366	788	18,578	...
1960	1,896,397	214,343	1,529,535	152,519	88,682	5,654	78,446	\$4,582
1965	2,688,592	339,507	1,816,888	532,197	135,432	9,598	109,392	16,442
1970	3,314,578	354,373	2,161,094	799,111	215,366	13,367	172,499	29,500
1980	3,423,081	354,797	1,883,438	1,184,846	607,574	40,548	443,097	123,930
1990	2,497,252	236,051	1,333,690	927,511	739,787	53,944	538,546	147,296
1995	2,956,482	241,756	1,386,111	1,328,615	943,028	69,312	637,326	236,390
1996	3,010,100	241,911	1,391,095	1,377,094	997,075	73,297	665,269	258,509
1997	2,969,909	240,031	1,376,186	1,353,692	1,014,245	75,573	674,451	264,221
1998	2,962,704	238,455	1,363,444	1,360,805	1,031,690	77,334	680,264	274,092
1999	2,970,039	240,899	1,353,918	1,375,222	1,066,979	81,648	697,212	288,119
2000	2,976,406	255,908	1,346,091	1,374,407	1,120,977	92,987	724,567	303,423
	<b>Disabled children, aged 18 or older</b>							
1957	28,869	16,686	12,183	...	\$1,115	\$526	\$589	...
1960	104,054	53,825	47,267	2,962	4,594	1,922	2,557	\$115
1965	198,390	87,122	102,287	8,981	10,271	3,541	6,357	374
1970	270,557	101,341	154,921	14,295	19,807	5,755	13,290	761
1980	450,169	140,548	276,738	32,883	89,561	22,463	62,625	4,473
1990	600,480	173,941	389,385	37,154	217,201	51,879	156,725	8,597
1995	686,101	188,965	446,377	50,759	300,007	68,743	217,553	13,711
1996	696,787	189,788	454,367	52,632	316,579	71,808	229,947	14,824
1997	704,709	189,780	461,974	52,955	330,258	73,984	240,802	15,472
1998	712,772	189,637	468,705	54,430	341,731	75,663	249,726	16,342
1999	720,526	189,815	474,804	55,907	357,099	78,391	261,339	17,369
2000	728,689	191,584	480,351	56,754	377,647	83,098	276,072	18,478
	<b>Students</b>							
1965	205,677	34,152	155,088	16,437	\$13,725	\$1,597	\$11,318	\$811
1970	537,170	89,994	371,982	75,194	44,672	5,351	35,252	4,069
1980	733,267	143,366	449,744	140,157	167,107	26,375	119,368	21,363
1990	89,278	12,208	52,938	24,132	34,641	3,673	24,935	6,033
1995	91,514	10,879	51,155	29,480	40,253	3,919	27,958	8,376
1996	95,904	10,868	52,205	32,831	43,032	4,072	29,276	9,684
1997	97,156	11,310	54,547	31,299	45,049	4,393	31,071	9,585
1998	93,452	10,634	51,645	31,173	43,941	4,233	29,949	9,759
1999	104,230	11,302	56,081	36,847	49,910	4,716	33,412	11,782
2000	97,768	11,459	51,565	34,744	49,184	5,092	32,417	11,674

CONTACT: Rona Blumenthal/Dana Nichelle Mercer (410) 965-0163/966-6377 for further information.

**5.F OASDI Current-Pay Benefits: Dependents & Survivors**

Table 5.F6.—Average monthly benefit for **survivors**, by type of benefit, 1940–2000

December	Widowed mothers and fathers	Nondisabled		Parents	Children				Disabled	
		Widows	Widowers		Total	Under age 18	Disabled, aged 18 or older	Students	Widows	Widowers
1940	\$19.61	\$20.28	...	\$13.09	\$12.22	\$12.22	...	...	...	...
1941	19.50	20.22	...	12.97	12.19	12.19	...	...	...	...
1942	19.57	20.15	...	13.05	12.24	12.24	...	...	...	...
1943	19.72	20.15	...	13.11	12.31	12.31	...	...	...	...
1944	19.80	20.17	...	13.08	12.38	12.38	...	...	...	...
1945	19.83	20.19	...	13.06	12.45	12.45	...	...	...	...
1946	20.07	20.22	...	13.15	12.57	12.57	...	...	...	...
1947	20.44	20.40	...	13.44	12.77	12.77	...	...	...	...
1948	20.80	20.60	...	13.63	12.99	12.99	...	...	...	...
1949	21.08	20.82	...	13.77	13.18	13.18	...	...	...	...
1950	34.24	36.54	\$37.23	36.69	28.43	28.43	...	...	...	...
1951	33.24	36.04	30.03	36.68	28.05	28.05	...	...	...	...
1952	36.13	40.67	33.09	41.33	31.30	31.30	...	...	...	...
1953	37.49	40.88	34.08	41.96	32.28	32.28	...	...	...	...
1954	44.52	46.28	39.27	47.44	37.01	37.01	...	...	...	...
1955	45.91	48.70	46.51	49.93	38.12	38.12	...	...	...	...
1956	47.35	50.14	47.11	50.78	39.36	39.36	...	...	...	...
1957	49.05	51.09	47.77	51.87	40.85	40.78	\$48.38	...	...	...
1958	50.53	51.91	48.84	52.83	42.10	41.98	49.63	...	...	...
1959	57.37	56.73	53.28	58.86	47.48	47.34	52.89	...	...	...
1960	59.29	57.69	53.81	60.31	51.37	51.29	54.10	...	...	...
1961	59.38	64.92	61.66	67.15	52.74	52.64	55.50	...	...	...
1962	59.38	65.88	62.12	68.18	53.57	53.47	55.99	...	...	...
1963	59.43	66.85	63.17	69.11	54.33	54.23	56.58	...	...	...
1964	59.40	67.85	63.49	70.05	54.99	54.87	57.27	...	...	...
1965	65.46	73.75	69.68	76.03	61.26	60.21	62.14	\$72.98	...	...
1966	65.59	74.11	70.52	76.52	61.84	60.37	62.67	71.71	...	...
1967	65.86	74.99	71.22	77.23	62.57	60.99	63.37	72.33	...	...
1968	74.93	86.54	82.14	88.21	70.85	68.90	73.11	81.76	\$72.27	\$72.40
1969	75.06	87.48	83.08	88.96	71.10	69.11	73.77	81.93	71.02	66.50
1970	86.51	102.02	96.50	103.21	82.23	79.82	85.79	94.77	81.99	73.10
1971	95.61	113.57	106.13	114.26	90.94	88.12	95.03	104.80	90.11	83.10
1972	115.45	138.19	127.98	138.95	110.36	106.87	115.25	126.63	109.50	98.80
1973	118.20	157.40	146.70	140.60	111.70	108.20	116.20	128.50	111.20	101.70
1974	134.20	177.30	164.30	157.50	126.48	122.52	130.33	144.79	125.90	118.60
1975	147.25	193.92	178.27	171.86	139.40	135.00	142.26	157.81	137.70	128.10
1976	159.77	208.99	191.78	185.07	151.94	147.49	152.88	169.80	147.00	133.80
1977 <sup>1</sup>	173.80	224.30	177.10	198.30	165.70	161.50	163.60	183.10	156.20	131.60
1978	190.40	241.40	186.10	214.00	182.20	178.30	176.20	200.80	165.70	129.70
1979	212.60	269.80	209.00	238.70	205.60	201.70	195.90	226.60	180.80	133.40
1980	246.20	311.50	239.40	276.00	239.50	235.30	226.40	265.40	205.40	145.70
1981	276.70	349.80	266.80	310.40	270.90	265.70	254.00	301.70	227.20	158.80
1982	302.80	379.30	285.60	335.40	285.40	291.50	279.90	260.70	242.80	165.50
1983	308.70	397.10	295.70	349.80	298.00	307.20	289.00	233.40	251.10	166.20
1984	321.50	416.10	306.80	363.90	314.30	320.70	302.60	257.20	307.70	190.70
1985	332.50	434.00	317.80	378.20	330.50	332.60	315.50	360.80	316.60	191.80
1986	338.30	444.90	324.80	386.30	336.80	338.70	323.10	375.70	321.30	195.50
1987	352.70	468.90	340.60	407.30	352.40	353.90	340.00	400.10	335.60	202.30
1988	367.90	493.40	359.50	428.40	367.60	368.00	357.40	424.70	350.00	211.30
1989	387.60	522.60	382.00	453.50	384.90	384.30	378.10	447.90	368.90	223.60
1990	409.10	557.40	408.40	482.20	405.50	403.80	402.50	471.00	391.30	238.40
1991	424.10	584.50	428.00	506.10	420.10	417.00	421.50	486.20	409.40	260.60
1992	437.70	608.70	443.60	526.40	432.30	427.60	438.30	504.10	425.30	273.30
1993	448.40	631.70	461.50	547.20	443.10	437.00	453.70	515.00	436.90	286.20
1994	464.40	656.60	481.40	569.50	456.20	448.70	470.80	532.20	449.20	299.90
1995	477.90	681.20	500.20	590.80	468.70	459.80	487.40	546.50	461.50	307.60
1996	514.90	708.30	520.70	613.50	487.20	478.20	506.10	560.80	474.30	318.00
1997	532.00	732.50	534.50	635.70	500.00	490.10	521.30	569.60	483.90	326.90
1998	545.10	750.30	549.10	651.10	509.60	498.90	532.80	579.90	491.00	332.90
1999	565.70	776.10	572.40	673.90	526.30	515.00	550.40	595.80	503.90	340.30
2000	595.00	811.80	606.90	703.90	550.10	538.30	574.70	628.70	523.80	361.70

<sup>1</sup> Children's data estimated.

5.F OASDI Current-Pay Benefits: Dependents & Survivors

Table 5.F7.—Number and percentage distribution of **survivors**, by type of benefit and primary insurance amount, December 2000

[Based on 10-percent sample]

Primary insurance amount	Widowed mothers and fathers		Nondisabled widows and widowers		Parents		Disabled widows and widowers		Children	
	Number	Percent	Number	Percent	Number	Percent	Number	Percent	Number	Percent
Total .....	201,270	100.0	4,698,660	100.0	3,000	100.0	200,130	100.0	1,877,940	100.0
Less than \$300.00 .....	5,690	2.8	36,080	.8	30	1.0	2,740	1.4	97,130	5.2
\$300.00–\$349.90 .....	2,240	1.1	115,230	2.5	50	1.7	2,480	1.2	65,390	3.5
\$350.00–\$399.90 .....	2,270	1.1	46,640	1.0	30	1.0	1,770	.9	41,620	2.2
\$400.00–\$449.90 .....	3,510	1.7	64,660	1.4	60	2.0	2,720	1.4	53,390	2.8
\$450.00–\$499.90 .....	6,940	3.4	120,680	2.6	110	3.7	5,580	2.8	104,000	5.5
\$500.00–\$549.90 .....	8,510	4.2	115,400	2.5	260	8.7	6,200	3.1	108,310	5.8
\$550.00–\$599.90 .....	8,580	4.3	120,080	2.6	90	3.0	6,680	3.3	106,460	5.7
\$600.00–\$649.90 .....	8,490	4.2	148,670	3.2	200	6.7	8,220	4.1	106,530	5.7
\$650.00–\$699.90 .....	9,630	4.8	139,610	3.0	160	5.3	8,110	4.1	102,670	5.5
\$700.00–\$749.90 .....	9,580	4.8	173,520	3.7	200	6.7	9,710	4.9	103,800	5.5
\$750.00–\$799.90 .....	10,520	5.2	195,150	4.2	160	5.3	9,660	4.8	98,990	5.3
\$800.00–\$849.90 .....	10,630	5.3	276,560	5.9	200	6.7	10,100	5.0	103,330	5.5
\$850.00–\$899.90 .....	10,450	5.2	337,180	7.2	140	4.7	10,860	5.4	98,880	5.3
\$900.00–\$949.90 .....	9,600	4.8	288,340	6.1	120	4.0	11,200	5.6	80,920	4.3
\$950.00–\$999.90 .....	9,670	4.8	336,750	7.2	110	3.7	11,580	5.8	77,370	4.1
\$1,000.00–\$1,049.90 .....	8,970	4.5	315,090	6.7	100	3.3	11,750	5.9	69,140	3.7
\$1,050.00–\$1,099.90 .....	8,890	4.4	298,480	6.4	90	3.0	10,680	5.3	63,280	3.4
\$1,100.00–\$1,149.90 .....	7,580	3.8	319,260	6.8	170	5.7	10,990	5.5	55,720	3.0
\$1,150.00–\$1,199.90 .....	7,470	3.7	308,980	6.6	90	3.0	10,380	5.2	52,700	2.8
\$1,200.00–\$1,249.90 .....	8,320	4.1	289,930	6.2	170	5.7	12,130	6.1	53,380	2.8
\$1,250.00–\$1,299.90 .....	9,280	4.6	265,520	5.7	170	5.7	12,850	6.4	55,130	2.9
\$1,300.00 or more .....	34,450	17.1	386,850	8.2	290	9.7	23,740	11.9	179,800	9.6

CONTACT: Rona Blumenthal/Dana Nichelle Mercer (410) 965-0163/966-6377 for further information.

5.F OASDI Current-Pay Benefits: Dependents & Survivors

Table 5.F8.—Number of **widows and widowers** and total monthly benefit, by type of benefit, 1950–2000

[Dollars, in thousands]

December	Total		Nondisabled—				Disabled widows and widowers	
			Widows		Widowers			
	Number	Benefit	Number	Benefit	Number	Benefit	Number	Benefit
1950	314,189	\$11,481	314,126	\$11,479	63	\$2	...	...
1951	384,265	13,849	384,011	13,841	254	8	...	...
1952	454,563	18,482	454,064	18,466	499	17	...	...
1953	540,653	22,096	539,854	22,069	799	27	...	...
1954	638,091	29,526	637,012	29,483	1,079	42	...	...
1955	701,360	34,152	700,294	34,103	1,066	50	...	...
1956	913,069	45,780	911,841	45,722	1,228	58	...	...
1957	1,095,137	55,944	1,093,645	55,872	1,492	71	...	...
1958	1,232,583	63,977	1,230,953	63,897	1,630	80	...	...
1959	1,393,587	79,047	1,391,686	78,946	1,901	101	...	...
1960	1,543,843	89,054	1,541,790	88,943	2,053	110	...	...
1961	1,697,308	110,179	1,694,977	110,035	2,331	144	...	...
1962	1,859,191	122,475	1,856,658	122,318	2,533	157	...	...
1963	2,010,769	134,403	2,008,102	134,234	2,667	168	...	...
1964	2,158,912	146,476	2,156,143	146,300	2,769	176	...	...
1965	2,371,433	174,883	2,368,629	174,688	2,804	195	...	...
1966	2,602,015	192,821	2,599,178	192,620	2,837	200	...	...
1967	2,769,618	207,692	2,766,736	207,487	2,882	205	...	...
1968	2,937,890	253,924	2,913,376	252,123	2,951	242	21,563	\$1,558
1969	3,091,710	269,799	3,049,177	266,741	3,064	255	39,469	2,803
1970	3,227,160	328,245	3,174,846	323,912	3,033	293	49,281	4,041
1971	3,366,304	380,963	3,306,528	375,528	3,033	322	56,743	5,113
1972	3,509,777	483,161	3,442,595	475,746	3,015	386	64,167	7,029
1973	3,656,353	571,654	3,574,458	562,441	3,126	459	78,769	8,754
1974	3,769,559	663,569	3,674,376	651,471	3,055	502	92,128	11,596
1975	3,888,705	747,902	3,776,090	732,269	3,104	553	109,511	15,080
1976	3,994,380	827,325	3,871,894	809,181	3,059	587	119,427	17,557
1977	4,119,487	914,738	3,980,324	892,764	11,887	2,105	127,276	19,869
1978	4,211,710	1,005,929	4,066,673	981,615	15,287	2,845	129,751	21,469
1979	4,321,496	1,153,272	4,173,745	1,126,089	17,918	3,745	129,833	23,438
1980	4,410,515	1,358,836	4,262,607	1,327,814	20,328	4,866	127,580	26,156
1981	4,507,941	1,560,103	4,363,708	1,526,511	22,643	6,042	121,590	27,550
1982	4,594,961	1,724,392	4,453,575	1,689,073	25,014	7,144	116,372	28,175
1983	4,693,791	1,844,798	4,554,414	1,808,647	27,786	8,216	111,591	27,935
1984	4,779,190	1,973,203	4,640,805	1,930,807	29,234	8,970	109,151	33,426
1985	4,862,805	2,094,003	4,725,618	2,050,678	30,182	9,592	107,005	33,734
1986	4,928,019	2,175,345	4,789,969	2,131,049	31,076	10,092	106,974	34,204
1987	4,983,846	2,318,747	4,846,135	2,272,557	31,429	10,703	106,282	35,487
1988	5,028,822	2,461,945	4,892,829	2,414,239	32,870	11,816	103,123	35,892
1989	5,070,873	2,629,728	4,935,911	2,579,726	33,332	12,731	101,630	37,270
1990	5,111,482	2,827,012	4,976,420	2,773,818	34,073	13,916	100,989	39,278
1991	5,158,383	2,989,385	5,008,789	2,927,768	35,105	15,024	114,489	46,593
1992	5,205,375	3,138,250	5,037,583	3,066,568	36,468	16,178	131,324	55,504
1993	5,224,279	3,264,849	5,039,874	3,183,768	37,390	17,255	147,015	63,826
1994	5,232,379	3,394,982	5,034,219	3,305,229	37,484	18,043	160,676	71,710
1995	5,225,519	3,514,262	5,014,991	3,416,203	37,504	18,759	173,024	79,300
1996	5,209,812	3,639,632	4,990,079	3,534,268	37,822	19,692	181,911	85,671
1997	5,053,442	3,646,898	4,829,456	3,537,348	36,048	19,268	187,938	90,282
1998	4,989,855	3,685,349	4,759,829	3,571,047	35,845	19,683	194,181	94,619
1999	4,943,915	3,774,601	4,709,091	3,654,598	36,029	20,624	198,795	99,380
2000	4,901,437	3,912,527	4,663,228	3,785,532	36,782	22,322	201,427	104,674

CONTACT: Rona Blumenthal/Dana Nichelle Mercer (410) 965-0163/966-6377 for further information.

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

Table 5.F9.—Number, percent, and average monthly benefit, by year of entitlement as **nondisabled widow or widower**, December 2000

[Based on 10-percent sample]

Year of entitlement	Number as of December 2000	Percentage distribution	Cumulative percent <sup>1</sup>	Average monthly benefit
Total .....	4,698,660	100.0	...	\$810.20
1995–2000 .....	1,610,790	34.3	...	864.70
1990–1994 .....	1,063,290	22.6	...	846.80
1985–1989 .....	865,750	18.4	...	801.10
1980–1984 .....	611,090	13.0	...	747.60
1975–1979 .....	320,440	6.8	...	683.60
1970–1974 .....	160,290	3.4	...	639.10
1965–1969 .....	59,930	1.3	...	626.20
Before 1965 .....	7,080	.2	...	602.90
2000 .....	281,940	6.0	6.0	875.30
1999 .....	295,630	6.3	12.3	861.40
1998 .....	280,800	6.0	18.3	864.60
1997 .....	263,500	5.6	23.9	862.20
1996 .....	251,850	5.4	29.2	860.80
1995 .....	237,070	5.0	34.3	863.00
1994 .....	229,050	4.9	39.2	863.50
1993 .....	221,720	4.7	43.9	854.20
1992 .....	212,070	4.5	48.4	850.40
1991 .....	203,640	4.3	52.7	834.20
1990 .....	196,810	4.2	56.9	828.20
1989 .....	185,880	4.0	60.9	820.50
1988 .....	179,840	3.8	64.7	812.40
1987 .....	173,660	3.7	68.4	802.10
1986 .....	168,520	3.6	72.0	787.30
1985 .....	157,850	3.4	75.3	778.90
1984 .....	147,730	3.1	78.5	768.40
1983 .....	136,620	2.9	81.4	753.30
1982 .....	120,190	2.6	83.9	749.30
1981 .....	111,700	2.4	86.3	733.20
1980 .....	94,850	2.0	88.3	722.20
1979 .....	83,610	1.8	90.1	708.20
1978 .....	72,450	1.5	91.7	697.70
1977 .....	56,770	1.2	92.9	682.30
1976 .....	57,660	1.2	94.1	657.00
1975 .....	49,950	1.1	95.2	654.40
1974 .....	42,780	.9	96.1	649.00
1973 .....	37,360	.8	96.9	639.60
1972 .....	31,120	.7	97.5	635.50
1971 .....	27,020	.6	98.1	631.30
1970 .....	22,010	.5	98.6	633.20
1969 .....	17,010	.4	98.9	637.10
1968 .....	14,190	.3	99.2	627.40
1967 .....	10,930	.2	99.5	623.80
1964 .....	8,210	.2	99.6	619.00
1965 .....	9,590	.2	99.8	614.00

<sup>1</sup> Represents those entitled in specified year or later.

Table 5.F10.—Number, percent, and average monthly benefit, by year of entitlement as **disabled widow or widower**, December 2000

[Based on 10-percent sample]

Year of entitlement	Number as of December 2000	Percentage distribution	Cumulative percent <sup>1</sup>	Average monthly benefit
Total .....	200,130	100.0	...	\$518.90
1996–2000 .....	105,100	52.5	...	515.60
1991–1995 .....	81,010	40.5	...	522.00
1986–1990 .....	14,020	7.0	...	525.90
2000 .....	13,360	6.7	6.7	511.40
1999 .....	22,840	11.4	18.1	525.20
1998 .....	23,090	11.5	29.6	519.20
1997 .....	23,080	11.5	41.2	511.50
1996 .....	22,730	11.4	52.5	508.90
1995 .....	20,020	10.0	62.5	521.20
1994 .....	19,010	9.5	72.0	521.30
1993 .....	15,450	7.7	79.7	517.00
1992 .....	12,700	6.3	86.1	527.60
1991 .....	13,830	6.9	93.0	524.80
1990 .....	4,860	2.4	95.4	548.50
1989 .....	3,840	1.9	97.3	520.90
1988 .....	2,400	1.2	98.5	510.90
1987 .....	1,820	.9	99.5	522.60
1986 .....	1,100	.5	100.0	481.20

<sup>1</sup> Represents those entitled in specified year or later.

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

Table 5.F11.—Number and percentage distribution of **nondisabled widows**, by monthly benefit and age, December 2000

[Based on 10-percent sample]

Monthly benefit	Total	Age attained during 2000							
		60–61	62–64	65–69	70–74	75–79	80–84	85–89	90 or older
Total number .....	4,661,540	128,420	316,750	693,230	809,890	940,570	799,700	576,030	396,950
Total percent .....	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0
Less than \$300.00 .....	3.3	3.7	4.3	3.5	3.6	3.6	3.2	3.1	1.7
\$300.00–\$349.90 .....	2.3	1.8	1.6	1.6	1.8	2.1	2.3	2.8	4.7
\$350.00–\$399.90 .....	2.4	2.8	2.5	2.2	2.3	2.4	2.4	2.5	2.2
\$400.00–\$449.90 .....	2.8	3.0	3.1	2.6	2.6	2.7	2.7	3.0	3.3
\$450.00–\$499.90 .....	3.4	3.5	3.4	3.1	3.1	3.2	3.4	3.6	4.4
\$500.00–\$549.90 .....	3.7	3.9	3.7	3.4	3.4	3.7	3.7	4.1	4.4
\$550.00–\$599.90 .....	4.5	4.6	4.4	4.1	4.0	4.5	4.8	4.9	4.8
\$600.00–\$649.90 .....	5.5	5.5	5.0	5.0	5.1	5.5	5.8	6.8	5.7
\$650.00–\$699.90 .....	6.2	5.8	6.1	5.4	5.8	6.3	6.4	7.0	7.4
\$700.00–\$749.90 .....	6.8	6.9	6.7	6.3	6.3	6.7	6.6	7.0	9.5
\$750.00–\$799.90 .....	7.1	6.9	7.2	6.9	7.0	7.0	6.3	7.2	9.2
\$800.00–\$849.90 .....	7.7	7.5	7.6	7.8	8.3	8.2	6.6	7.0	9.1
\$850.00–\$899.90 .....	8.2	8.9	9.2	9.6	9.4	7.6	6.8	6.7	8.7
\$900.00–\$949.90 .....	7.5	9.8	10.8	9.2	7.5	7.5	6.4	5.9	5.9
\$950.00–\$999.90 .....	6.3	8.5	8.8	6.6	6.3	6.1	5.8	5.6	5.5
\$1,000.00–\$1,049.90 .....	5.1	7.0	6.0	5.6	5.8	4.9	5.0	4.5	3.3
\$1,050.00–\$1,099.90 .....	3.8	5.1	4.2	4.5	4.3	3.8	3.8	3.3	2.2
\$1,100.00–\$1,149.90 .....	2.9	3.2	2.5	3.4	3.2	3.2	3.0	2.5	1.3
\$1,150.00–\$1,199.90 .....	2.3	1.1	1.3	2.5	2.9	2.8	2.5	1.9	1.0
\$1,200.00–\$1,249.90 .....	1.9	.4	.7	2.3	2.4	2.1	2.4	1.8	.8
\$1,250.00–\$1,299.90 .....	1.6	.2	.4	1.8	1.7	1.7	2.3	1.8	.7
\$1,300.00 or more .....	4.6	2	.6	2.8	3.2	4.5	8.1	7.3	4.3
<b>Average benefit .....</b>	<b>\$811.80</b>	<b>\$773.90</b>	<b>\$774.10</b>	<b>\$814.30</b>	<b>\$815.10</b>	<b>\$813.70</b>	<b>\$842.00</b>	<b>\$817.80</b>	<b>\$769.30</b>

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5.F OASDI Current-Pay Benefits: Dependents & Survivors

Table 5.F12.—Number of **widowed mothers and fathers** and total monthly benefit, by type of benefit, 1950–2000

[Dollars, in thousands]

December	Total		Widowed						Surviving divorced mothers and fathers	
			Total		With at least 1 child under age 16 <sup>1</sup>		Entitled solely because of at least 1 disabled child <sup>2</sup>			
	Number	Benefit	Number	Benefit	Number	Benefit	Number	Benefit	Number	Benefit
1950.....	169,438	\$5,801	169,426	\$5,800	169,426	\$5,800	...	...	12	(3)
1951.....	203,782	6,776	203,662	6,771	203,662	6,771	...	...	120	\$4
1952.....	228,984	8,273	228,815	8,266	228,815	8,266	...	...	169	7
1953.....	253,873	9,517	253,670	9,508	253,670	9,508	...	...	203	9
1954.....	271,536	12,089	271,313	12,078	271,313	12,078	...	...	223	11
1955.....	291,916	13,403	291,656	13,389	291,656	13,389	...	...	260	14
1956.....	301,240	14,262	300,978	14,248	300,978	14,248	...	...	262	14
1957.....	328,309	16,102	328,018	16,087	325,636	15,958	2,382	\$129	291	16
1958.....	353,964	17,887	353,650	17,869	349,649	17,649	4,001	220	314	18
1959.....	376,145	21,579	375,819	21,557	370,545	21,245	5,274	312	326	22
1960.....	401,358	23,795	400,976	23,768	394,560	23,383	6,416	385	382	27
1961.....	428,138	25,425	427,699	25,395	420,258	24,938	7,441	457	439	30
1962.....	451,984	26,838	451,520	26,805	443,182	26,290	8,338	515	464	33
1963.....	461,675	27,438	461,211	27,405	452,106	26,830	9,105	575	464	32
1964.....	470,597	27,954	470,100	27,290	460,348	27,295	9,752	625	497	34
1965.....	471,816	30,882	471,286	30,842	461,011	30,132	10,275	710	530	40
1966.....	487,755	31,983	486,958	31,927	476,275	31,188	10,683	739	797	56
1967.....	496,307	32,686	495,308	32,616	483,808	31,791	11,500	825	999	71
1968.....	504,916	37,833	503,774	37,743	492,674	36,849	11,100	894	1,142	90
1969.....	511,639	38,406	510,355	38,305	499,324	37,402	11,031	902	1,284	101
1970.....	523,136	45,258	521,698	45,127	510,215	44,039	11,483	1,089	1,438	131
1971.....	535,126	51,163	533,560	51,055	520,301	49,603	13,259	1,402	1,566	158
1972.....	540,965	62,457	539,153	62,237	526,548	60,612	12,605	1,625	1,812	220
1973.....	571,907	67,578	565,327	66,823	551,509	64,985	13,818	1,838	6,580	754
1974.....	573,506	76,980	562,801	75,605	544,335	72,914	18,466	2,692	10,705	1,374
1975.....	581,845	85,676	565,941	83,435	544,886	80,068	21,075	3,366	15,904	2,241
1976.....	578,727	92,466	558,933	89,400	537,002	85,637	21,931	3,764	19,794	3,065
1977.....	583,195	101,345	558,886	97,227	536,481	93,091	22,405	4,136	24,309	4,117
1978.....	576,343	109,714	548,463	104,506	525,879	100,028	22,584	4,478	27,880	5,209
1979.....	573,750	121,957	541,480	115,284	518,564	110,235	22,916	5,049	32,270	6,674
1980.....	562,316	138,426	525,661	129,754	502,639	123,885	23,022	5,869	36,655	8,671
1981.....	547,593	151,509	507,777	140,990	484,427	134,299	23,350	6,691	39,816	10,518
1982.....	514,772	155,876	474,003	144,207	451,159	137,068	22,844	7,139	40,769	11,669
1983.....	400,298	123,559	363,946	112,979	339,367	104,956	24,579	8,022	36,352	10,581
1984.....	382,411	122,957	346,319	112,002	318,076	102,391	28,243	9,612	36,092	10,995
1985.....	371,659	123,557	335,085	112,117	306,004	101,812	29,081	10,304	36,574	11,440
1986.....	350,546	118,602	315,572	107,470	286,290	96,887	29,282	10,583	34,974	11,132
1987.....	340,940	115,967	307,581	104,888	278,582	93,871	28,999	11,017	33,359	11,079
1988.....	317,761	116,902	285,265	105,596	256,463	94,096	28,802	11,500	32,496	11,306
1989.....	312,079	120,970	280,006	109,184	251,646	97,170	28,360	12,014	32,073	11,786
1990.....	303,923	124,340	272,526	112,103	244,965	99,683	27,561	12,420	31,397	12,237
1991.....	300,661	127,510	269,679	114,962	242,379	102,085	27,300	12,877	30,982	12,548
1992.....	294,716	128,748	263,630	115,884	236,990	102,840	26,640	13,045	30,546	12,864
1993.....	289,350	129,752	259,320	116,771	232,794	103,365	26,526	13,407	30,030	12,981
1994.....	283,072	131,463	253,928	118,399	227,709	104,658	26,219	13,741	29,144	13,064
1995.....	275,020	131,430	247,113	118,550	221,494	104,664	25,619	13,886	27,907	12,881
1996.....	242,135	124,678	218,171	112,627	193,664	98,799	24,507	13,828	23,964	12,051
1997.....	230,222	122,488	207,658	110,774	184,184	97,120	23,474	13,654	22,564	11,714
1998.....	220,610	120,247	199,447	109,001	176,660	95,491	22,787	13,510	21,163	11,246
1999.....	212,401	120,157	192,544	109,195	170,572	95,732	21,972	13,463	19,857	10,962
2000.....	203,052	120,812	184,397	109,941	164,420	97,063	19,977	12,878	18,655	10,871

<sup>1</sup> Prior to August 1981, benefits were payable to mothers and fathers caring for a child under age 18. For mothers and fathers caring for a child who was at least age 14 and who were entitled in August 1981, benefits were continued until the child attained age 18 or September 1983, whichever came earlier.

<sup>2</sup> Excludes mothers and fathers who had both disabled and nondisabled entitled children in their care.

<sup>3</sup> Less than \$500.

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

Table 5.F13.—Number and average monthly benefit for **nondisabled widows** aged 65 or older, by reduction status and limitation of benefit, December 2000

[Based on 10-percent sample]

Age	Number	Average monthly benefit	Benefits not reduced due to early retirement of widow						Benefits reduced due to early retirement of widow	
			Number	Average monthly benefit	Benefits not limited due to early retirement of spouse		Benefits limited due to early retirement of spouse		Number	Average monthly benefit
					Number	Average monthly benefit	Number	Average monthly benefit		
Total .....	4,216,370	\$815.80	1,954,430	\$910.20	996,840	\$1,009.00	957,590	\$807.30	1,261,940	\$734.30
65-69 .....	693,230	814.30	123,260	951.90	86,600	991.30	36,660	858.80	569,970	784.50
65 .....	135,490	800.40	13,470	974.90	11,650	991.00	1,820	871.90	122,020	781.20
66 .....	135,810	820.50	20,490	976.30	16,000	1,006.00	4,490	870.30	115,320	792.80
67 .....	133,970	815.50	24,000	942.80	17,020	982.50	6,980	845.90	109,970	787.70
68 .....	141,780	816.10	29,840	944.40	19,910	984.10	9,930	864.80	111,940	781.90
69 .....	146,180	818.50	35,460	941.60	22,020	994.10	13,440	855.40	110,720	779.10
70-74 .....	809,890	815.10	268,700	922.70	143,890	991.50	124,810	843.40	541,190	761.70
70 .....	150,940	817.00	41,590	924.30	23,640	990.20	17,950	837.60	109,350	776.20
71 .....	151,150	820.00	45,850	934.30	25,640	991.20	20,210	862.30	105,300	770.20
72 .....	159,610	817.00	52,870	924.40	28,290	993.30	24,580	845.00	106,740	763.80
73 .....	171,110	812.10	60,840	915.30	31,590	984.00	29,250	841.10	110,270	755.10
74 .....	177,080	810.70	67,550	919.10	34,730	997.80	32,820	835.80	109,530	743.80
75-79 .....	940,570	813.70	429,880	917.50	206,900	1,017.00	222,980	825.20	510,690	726.30
75 .....	178,360	808.80	72,100	911.70	34,750	1,002.30	37,350	827.40	106,260	739.00
76 .....	189,010	805.40	82,700	905.50	40,240	994.70	42,460	821.00	106,310	727.60
77 .....	186,690	811.40	84,950	915.20	41,160	1,013.30	43,790	822.90	101,740	724.70
78 .....	190,390	817.40	91,650	922.60	44,260	1,025.80	47,390	826.20	98,740	719.80
79 .....	196,120	824.60	98,480	929.00	46,490	1,042.20	51,990	827.80	97,640	719.30
80-84 .....	799,700	842.00	462,140	947.40	214,560	1,077.30	247,580	834.80	337,560	697.80
80 .....	187,070	835.50	99,070	941.40	46,750	1,063.00	52,320	832.70	88,000	716.20
81 .....	165,910	837.30	92,330	944.10	43,030	1,068.30	49,300	835.70	73,580	703.20
82 .....	159,900	851.30	93,880	956.70	43,110	1,099.80	50,770	835.20	66,020	701.50
83 .....	145,490	850.60	88,040	955.50	41,550	1,086.00	46,490	838.90	57,450	689.70
84 .....	141,330	836.90	88,820	939.50	40,120	1,070.20	48,700	831.90	52,510	663.30
85-89 .....	576,030	817.80	383,990	904.70	181,220	1,039.30	202,770	784.50	192,040	644.00
85 .....	135,180	832.70	87,620	930.60	40,530	1,071.30	47,090	809.40	47,560	652.50
86 .....	125,790	827.00	82,340	922.30	38,690	1,066.50	43,650	794.50	43,450	646.50
87 .....	116,450	817.90	77,770	904.60	36,490	1,041.80	41,280	783.20	38,680	643.70
88 .....	106,430	804.90	72,420	884.50	33,800	1,016.20	38,620	769.20	34,010	635.40
89 .....	92,180	798.00	63,840	869.80	31,710	987.00	32,130	754.10	28,340	636.40
90 or older .....	396,950	769.30	286,460	817.00	163,670	900.80	122,790	705.40	110,490	645.80

<sup>1</sup> Includes 151,820 widows with benefits also limited due to early retirement of spouse.



**5.G OASDI Current-Pay Benefits: Retired Workers with Dual Entitlement**

Table 5.G1.—Number and percentage distribution of persons receiving both a retired-worker and secondary benefit with and without reduction for early retirement, by primary insurance amount and sex, December 2000

[Based on 10-percent sample]

Primary insurance amount and sex	Total		Without reduction for early retirement		With reduction for early retirement	
	Number	Percent	Number	Percent	Number	Percent
Total .....	6,009,800	100.0	1,060,100	100.0	4,949,700	100.0
Less than \$250.00 .....	742,520	12.4	107,190	10.1	635,330	12.8
\$250.00–\$299.90 .....	411,240	6.8	58,330	5.5	352,910	7.1
\$300.00–\$349.90 .....	635,300	10.6	107,190	10.1	528,110	10.7
\$350.00–\$399.90 .....	384,730	6.4	62,500	5.9	322,230	6.5
\$400.00–\$449.90 .....	509,670	8.5	85,460	8.1	424,210	8.6
\$450.00–\$499.90 .....	726,780	12.1	127,550	12.0	599,230	12.1
\$500.00–\$549.90 .....	596,960	9.9	106,000	10.0	490,960	9.9
\$550.00–\$599.90 .....	459,480	7.6	87,970	8.3	371,510	7.5
\$600.00–\$649.90 .....	384,230	6.4	74,340	7.0	309,890	6.3
\$650.00–\$699.90 .....	247,750	4.1	49,940	4.7	197,810	4.0
\$700.00–\$749.90 .....	198,780	3.3	41,140	3.9	157,640	3.2
\$750.00–\$799.90 .....	163,250	2.7	34,430	3.2	128,820	2.6
\$800.00–\$849.90 .....	134,240	2.2	28,390	2.7	105,850	2.1
\$850.00–\$899.90 .....	113,920	1.9	24,410	2.3	89,510	1.8
\$900.00–\$949.90 .....	85,760	1.4	17,220	1.6	68,540	1.4
\$950.00–\$999.90 .....	68,300	1.1	13,620	1.3	54,680	1.1
\$1,000.00–\$1,049.90 .....	48,970	.8	9,470	.9	39,500	.8
\$1,050.00–\$1,099.90 .....	33,790	.6	6,770	.6	27,020	.5
\$1,100.00 or more .....	64,130	1.1	18,180	1.7	45,950	.9
Men .....	113,410	100.0	29,050	100.0	84,360	100.0
Less than \$250.00 .....	8,690	7.7	3,920	13.5	4,770	5.7
\$250.00–\$299.90 .....	3,850	3.4	1,400	4.8	2,450	2.9
\$300.00–\$349.90 .....	7,600	6.7	2,800	9.6	4,800	5.7
\$350.00–\$399.90 .....	3,800	3.4	1,360	4.7	2,440	2.9
\$400.00–\$449.90 .....	5,700	5.0	1,970	6.8	3,730	4.4
\$450.00–\$499.90 .....	8,140	7.2	2,490	8.6	5,650	6.7
\$500.00–\$549.90 .....	7,240	6.4	2,090	7.2	5,150	6.1
\$550.00–\$599.90 .....	6,320	5.6	1,850	6.4	4,470	5.3
\$600.00–\$649.90 .....	6,360	5.6	1,450	5.0	4,910	5.8
\$650.00–\$699.90 .....	4,920	4.3	870	3.0	4,050	4.8
\$700.00–\$749.90 .....	5,070	4.5	930	3.2	4,140	4.9
\$750.00–\$799.90 .....	5,150	4.5	940	3.2	4,210	5.0
\$800.00–\$849.90 .....	4,640	4.1	870	3.0	3,770	4.5
\$850.00–\$899.90 .....	5,000	4.4	1,010	3.5	3,990	4.7
\$900.00–\$949.90 .....	5,200	4.6	750	2.6	4,450	5.3
\$950.00–\$999.90 .....	5,290	4.7	970	3.3	4,320	5.1
\$1,000.00–\$1,049.90 .....	4,810	4.2	740	2.5	4,070	4.8
\$1,050.00–\$1,099.90 .....	4,040	3.6	560	1.9	3,480	4.1
\$1,100.00 or more .....	11,590	10.2	2,080	7.2	9,510	11.3
Women .....	5,896,390	100.0	1,031,050	100.0	4,865,340	100.0
Less than \$250.00 .....	733,830	12.4	103,270	10.0	630,560	13.0
\$250.00–\$299.90 .....	407,390	6.9	56,930	5.5	350,460	7.2
\$300.00–\$349.90 .....	627,700	10.6	104,390	10.1	523,310	10.8
\$350.00–\$399.90 .....	380,930	6.5	61,140	5.9	319,790	6.6
\$400.00–\$449.90 .....	503,970	8.5	83,490	8.1	420,480	8.6
\$450.00–\$499.90 .....	718,640	12.2	125,060	12.1	593,580	12.2
\$500.00–\$549.90 .....	589,720	10.0	103,910	10.1	485,810	10.0
\$550.00–\$599.90 .....	453,160	7.7	86,120	8.4	367,040	7.5
\$600.00–\$649.90 .....	377,870	6.4	72,890	7.1	304,980	6.3
\$650.00–\$699.90 .....	242,830	4.1	49,070	4.8	193,760	4.0
\$700.00–\$749.90 .....	193,710	3.3	40,210	3.9	153,500	3.2
\$750.00–\$799.90 .....	158,100	2.7	33,490	3.2	124,610	2.6
\$800.00–\$849.90 .....	129,600	2.2	27,520	2.7	102,080	2.1
\$850.00–\$899.90 .....	108,920	1.8	23,400	2.3	85,520	1.8
\$900.00–\$949.90 .....	80,560	1.4	16,470	1.6	64,090	1.3
\$950.00–\$999.90 .....	63,010	1.1	12,650	1.2	50,360	1.0
\$1,000.00–\$1,049.90 .....	44,160	.7	8,730	.8	35,430	.7
\$1,050.00–\$1,099.90 .....	29,750	.5	6,210	.6	23,540	.5
\$1,100.00 or more .....	52,540	.9	16,100	1.6	36,440	.7

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## 5.G OASDI Current-Pay Benefits: Retired Workers with Dual Entitlement

Table 5.G2.—Number receiving both a retired-worker and secondary benefit, by type of secondary benefit, 1952–2000

December <sup>1</sup>	Women								Men				
	Total			Wife's benefits		Widow's benefits			Parent's benefits	Total	Husband's benefits	Widower's benefits	Parent's benefits
	Number	Percent of all women retired workers	Number	Percent of all entitled to wife's benefits because of age	Number	Percent of all entitled to widow's benefits	Number						
1952.....	36,132	35,402	6.0	14,131	6.0	20,850	4.4	421	730	258	83	389	
1953.....	54,798	53,631	6.8	23,355	2.7	29,668	5.2	608	1,167	529	148	490	
1954.....	79,689	77,978	8.0	34,225	3.4	42,899	6.3	854	1,711	827	257	627	
1955.....	108,551	106,320	8.7	49,637	4.2	55,664	7.4	1,019	2,231	1,224	342	665	
1956.....	143,284	140,603	9.1	68,766	4.8	70,601	7.2	1,236	2,681	1,542	426	713	
1957.....	194,501	190,951	9.6	102,522	5.6	86,951	7.4	1,478	3,550	2,152	578	820	
1958.....	229,599	225,790	9.8	124,504	6.1	99,669	7.5	1,617	3,809	2,421	634	754	
1959.....	268,900	264,434	10.2	141,831	6.4	120,458	8.0	2,145	4,466	2,794	772	900	
1960.....	307,736	302,646	10.6	159,032	6.8	141,218	8.4	2,396	5,090	3,197	911	982	
1961.....	335,243	330,727	10.5	159,587	6.6	169,264	9.1	1,876	4,516	2,652	1,090	774	
1962.....	427,085	421,535	12.1	204,445	7.9	214,371	10.4	2,719	5,550	3,229	1,330	991	
1963.....	502,839	496,639	13.2	138,081	8.9	255,408	11.3	3,150	6,200	3,597	1,543	1,060	
1964.....	577,954	571,144	14.2	269,657	9.9	297,929	12.1	3,558	6,810	3,940	1,752	1,118	
1965 <sup>2</sup> .....	618,730	611,610	14.3	282,940	10.3	324,930	12.3	3,740	7,120	4,110	1,910	1,100	
1966 <sup>2</sup> .....	706,860	699,080	15.1	315,550	11.2	379,440	13.2	4,090	7,780	4,470	2,260	1,050	
1967 <sup>2</sup> .....	770,190	760,950	15.7	334,200	11.8	422,480	13.8	4,270	9,240	5,190	3,070	980	
1968 <sup>2</sup> .....	842,560	831,760	16.3	354,750	12.4	472,590	14.5	4,420	10,800	5,810	4,110	880	
1969 <sup>2</sup> .....	920,250	909,720	17.0	376,520	13.0	528,660	15.3	4,540	10,530	5,620	4,160	750	
1970 <sup>2</sup> .....	977,340	966,780	17.1	388,210	13.3	573,950	15.9	4,620	10,560	5,530	4,400	630	
1971 <sup>2</sup> .....	1,069,940	1,060,120	17.7	411,710	13.8	643,730	16.9	4,680	9,820	5,130	4,170	520	
1972 <sup>2</sup> .....	1,183,369	1,170,286	18.5	477,333	15.5	688,087	17.3	4,866	13,083	6,797	5,442	844	
1973.....	1,377,080	1,361,360	20.2	562,111	17.7	794,001	22.2	5,248	15,710	7,966	6,986	758	
1974 <sup>2</sup> .....	1,534,583	1,516,326	21.3	554,844	17.1	956,662	21.4	4,820	18,257	6,592	11,080	585	
1975.....	1,679,825	1,660,451	22.4	616,669	18.4	1,038,992	22.3	4,790	19,374	9,920	8,690	764	
1976 <sup>2</sup> .....	1,827,928	1,812,008	23.4	669,792	19.5	1,137,251	23.4	4,965	15,920	7,497	7,779	644	
1977.....	2,026,534	1,991,915	24.6	762,250	21.4	1,225,344	24.3	4,321	34,619	14,557	19,544	518	
1978.....	2,208,490	2,163,011	25.7	836,004	22.8	1,322,897	25.3	4,110	45,479	17,832	27,192	455	
1979.....	2,435,848	2,380,260	27.1	917,747	24.4	1,458,611	26.6	3,902	55,588	20,179	35,004	405	
1980.....	2,660,037	2,594,467	28.5	1,015,672	26.2	1,575,085	27.8	3,710	65,570	22,597	42,580	393	
1982.....	3,109,239	3,031,518	31.1	1,239,736	29.8	1,788,556	29.5	3,226	77,721	24,787	52,604	330	
1983.....	3,355,148	3,267,890	32.5	1,369,396	31.6	1,895,579	30.3	2,915	87,258	27,449	59,518	291	
1984.....	3,568,639	3,479,191	33.7	1,479,756	33.2	1,996,805	31.0	2,630	89,448	27,189	62,011	248	
1985.....	3,801,183	3,708,856	34.9	1,594,226	34.7	2,112,245	31.8	2,385	92,327	26,912	65,202	213	
1986.....	4,032,760	3,934,811	36.1	1,719,449	36.2	2,213,225	32.5	2,137	97,949	27,693	70,064	192	
1987.....	4,214,214	4,116,759	36.9	1,804,946	37.3	2,309,899	33.1	1,914	97,455	26,928	70,359	168	
1988.....	4,403,012	4,302,714	37.9	1,892,763	38.5	2,408,232	33.8	1,719	100,298	27,210	72,942	146	
1989.....	4,590,475	4,487,314	38.7	1,982,095	39.5	2,503,679	34.4	1,540	103,161	27,484	75,543	134	
1990.....	4,783,122	4,677,680	39.5	2,076,737	40.5	2,599,560	35.1	1,383	105,442	27,463	77,862	117	
1991.....	4,959,610	4,852,656	40.2	2,158,022	41.5	2,693,388	35.7	1,246	106,954	27,195	79,654	105	
1992.....	5,140,627	5,032,206	41.0	2,242,029	42.3	2,789,029	36.3	1,148	108,421	26,849	81,475	97	
1993 <sup>3</sup> .....	5,285,960	5,176,650	41.6	2,312,000	43.1	2,863,510	37.0	1,140	109,310	26,330	82,920	60	
1994 <sup>3</sup> .....	5,419,910	5,308,300	42.1	2,359,470	43.9	2,947,820	37.6	1,010	111,610	26,920	84,660	30	
1995 <sup>3</sup> .....	5,533,200	5,420,320	42.5	2,397,710	44.5	3,021,720	38.0	890	112,880	26,660	86,190	30	
1996 <sup>3</sup> .....	5,629,780	5,517,510	42.8	2,429,520	45.3	3,087,130	38.3	860	112,270	25,750	86,480	40	
1997 <sup>3</sup> .....	5,729,620	5,617,590	42.7	2,461,060	46.0	3,155,760	39.6	770	112,030	24,540	87,460	30	
1998 <sup>3</sup> .....	5,810,410	5,699,080	42.8	2,482,950	46.7	3,215,380	40.4	750	111,330	23,740	87,560	30	
1999 <sup>3</sup> .....	5,883,950	5,772,260	42.9	2,499,200	47.3	3,272,420	41.0	640	111,690	23,560	88,100	30	
2000 <sup>3</sup> .....	6,009,800	5,896,390	42.9	2,568,470	48.2	3,327,360	41.6	560	113,410	24,660	88,720	30	

<sup>1</sup> Data not available for 1981.

<sup>2</sup> Distributions by type of secondary benefit are estimated.

<sup>3</sup> Based on 10-percent sample.

## 5.G OASDI Current-Pay Benefits: Retired Workers with Dual Entitlement

Table 5.G3.—Number and average monthly benefit for persons receiving both a retired-worker and secondary benefit, by type of secondary benefit, December 2000

[Based on 10-percent sample]

Secondary benefit	Number	Average monthly benefit		
		Total benefit	Retired-worker benefit	Reduced secondary benefit
Total .....	6,009,800	\$760.20	\$421.30	\$338.90
Wives and husbands.....	2,593,130	506.90	333.70	173.20
Wives .....	2,568,470	507.60	333.80	173.80
Of retired workers .....	2,536,710	508.00	333.90	174.10
Of disabled workers.....	31,760	481.00	327.30	153.70
Husbands .....	24,660	438.90	323.10	115.80
Of retired workers .....	23,840	441.10	325.10	116.00
Of disabled workers.....	820	377.00	266.60	110.40
Widows and widowers .....	3,416,080	952.40	487.80	464.60
Widows .....	3,327,360	954.30	483.20	471.10
Widowers .....	88,720	879.60	661.00	218.60
Parents.....	590	835.10	412.00	423.10

Table 5.G4.—Number, combined average monthly benefit, and retired-worker benefit as percent of total combined benefit, December 2000

[Based on 10-percent sample]

Total combined monthly benefit	Number dually entitled as—		Average combined monthly benefit		Retired-worker benefit as percent of combined monthly benefit	
	Wives or husbands <sup>1</sup>	Widows or widowers <sup>2</sup>	Wives or husbands	Widows or widowers	Wives or husbands	Widows or widowers
Total .....	2,593,130	3,416,080	\$504.50	\$957.60	66	51
Less than \$200.00 .....	22,900	2,620	157.70	154.20	80	78
\$200.00–\$249.90 .....	29,870	3,420	226.20	226.80	75	75
\$250.00–\$299.90 .....	49,580	10,130	276.10	277.70	72	77
\$300.00–\$349.90 .....	83,220	18,000	326.80	324.40	69	77
\$350.00–\$399.90 .....	154,580	22,550	377.50	376.50	68	72
\$400.00–\$449.90 .....	331,340	34,820	427.80	426.20	67	70
\$450.00–\$499.90 .....	578,450	53,240	476.40	476.00	67	69
\$500.00–\$549.90 .....	594,310	63,250	522.50	525.40	69	68
\$550.00–\$599.90 .....	334,640	78,270	572.10	575.20	67	66
\$600.00–\$649.90 .....	206,110	102,070	622.50	625.40	64	64
\$650.00–\$699.90 .....	111,040	118,920	671.60	675.80	61	63
\$700.00–\$749.90 .....	57,660	155,150	722.00	725.70	59	62
\$750.00–\$799.90 .....	17,250	202,250	770.00	775.20	53	60
\$800.00–\$849.90 .....	6,130	253,520	823.30	824.50	48	59
\$850.00–\$899.90 .....	4,040	301,520	872.80	873.90	47	57
\$900.00–\$949.90 .....	2,890	315,350	922.10	924.80	49	53
\$950.00–\$999.90 .....	2,120	301,510	974.20	974.00	46	52
\$1,000.00–\$1,049.90 .....	<sup>3</sup> 7,000	280,690	<sup>3</sup> 1,156.90	1,024.10	<sup>3</sup> 40	50
\$1,050.00–\$1,099.90 .....	...	223,490	...	1,073.60	...	48
\$1,100.00–\$1,149.90 .....	...	182,050	...	1,124.30	...	47
\$1,150.00–\$1,199.90 .....	...	156,720	...	1,174.30	...	46
\$1,200.00–\$1,249.90 .....	...	130,940	...	1,224.20	...	44
\$1,250.00–\$1,299.90 .....	...	112,190	...	1,273.10	...	43
\$1,300.00–\$1,349.90 .....	...	73,100	...	1,323.70	...	42
\$1,350.00–\$1,399.90 .....	...	52,870	...	1,372.80	...	40
\$1,400.00 or more.....	...	167,440	...	1,638.30	...	36

<sup>1</sup> Includes 24,660 husbands.

<sup>2</sup> Includes 88,720 widowers.

<sup>3</sup> \$1,000 or more.

CONTACT: Barbara Lingg/Salvatore Gallicchio (410) 965-0156/0158 for further information.

## 5.G OASDI Current-Pay Benefits: Retired Workers with Dual Entitlement

Table 5.G5.—Number and percentage distribution, by total combined monthly benefit and retired-worker benefit, December 2000

[Based on 10-percent sample]

Total combined monthly benefit	Number	Total	Percent of beneficiaries receiving retired-worker benefit of—											
			Less than \$200.00	\$200.00-\$249.90	\$250.00-\$299.90	\$300.00-\$349.90	\$350.00-\$399.90	\$400.00-\$449.90	\$450.00-\$499.90	\$500.00-\$549.90	\$550.00-\$599.90	\$600.00-\$649.90	\$650.00-\$699.90	\$700.00 or more
Dually entitled as wives or husbands <sup>1</sup>														
Total .....	2,593,130	100.0	17.8	11.7	11.5	10.5	15.6	13.9	9.9	5.1	2.3	1.1	0.4	0.2
Less than \$200.00 .....	22,900	100.0	100.0	...	...	...	...	...	...	...	...	...	...	...
\$200.00-\$249.90 .....	29,870	100.0	66.1	33.9	...	...	...	...	...	...	...	...	...	...
\$250.00-\$299.90 .....	49,580	100.0	47.1	29.3	23.6	...	...	...	...	...	...	...	...	...
\$300.00-\$349.90 .....	83,220	100.0	35.4	24.1	23.8	16.7	...	...	...	...	...	...	...	...
\$350.00-\$399.90 .....	154,580	100.0	27.3	18.5	19.1	17.8	17.4	...	...	...	...	...	...	...
\$400.00-\$449.90 .....	331,340	100.0	22.8	14.4	14.1	13.6	22.2	12.8	...	...	...	...	...	...
\$450.00-\$499.90 .....	578,450	100.0	17.7	12.0	12.0	11.3	19.9	18.4	8.8	...	...	...	...	...
\$500.00-\$549.90 .....	594,310	100.0	10.8	8.8	9.6	9.8	18.1	19.0	17.0	6.9	...	...	...	...
\$550.00-\$599.90 .....	334,640	100.0	10.5	8.1	8.8	8.5	13.3	16.3	15.6	13.7	5.2	...	...	...
\$600.00-\$649.90 .....	206,110	100.0	11.2	7.9	8.2	7.8	10.5	12.8	13.2	12.2	11.1	5.0	...	...
\$650.00-\$699.90 .....	111,040	100.0	11.5	8.8	8.2	7.5	7.7	9.9	12.6	10.8	10.4	9.4	3.2	...
\$700.00 or more .....	97,090	100.0	11.4	8.4	10.0	8.5	7.2	8.1	11.2	8.7	8.4	7.0	6.5	4.6
Dually entitled as widows or widowers <sup>2</sup>														
Total .....	3,416,080	100.0	6.4	5.3	10.1	7.9	9.3	9.0	9.0	7.6	6.9	6.1	5.2	17.0
Less than \$200.00 .....	2,620	100.0	100.0	...	...	...	...	...	...	...	...	...	...	...
\$200.00-\$249.90 .....	3,420	100.0	67.3	32.7	...	...	...	...	...	...	...	...	...	...
\$250.00-\$299.90 .....	10,130	100.0	32.1	27.2	40.7	...	...	...	...	...	...	...	...	...
\$300.00-\$349.90 .....	18,000	100.0	18.8	14.8	47.5	18.9	...	...	...	...	...	...	...	...
\$350.00-\$399.90 .....	22,550	100.0	18.7	13.6	29.5	23.7	14.5	...	...	...	...	...	...	...
\$400.00-\$449.90 .....	34,820	100.0	14.5	10.1	24.9	18.8	19.8	11.8	...	...	...	...	...	...
\$450.00-\$499.90 .....	53,240	100.0	11.5	8.0	18.8	16.7	17.5	16.9	10.6	...	...	...	...	...
\$500.00-\$549.90 .....	63,250	100.0	8.8	7.1	16.5	14.0	15.5	14.6	15.7	7.9	...	...	...	...
\$550.00-\$599.90 .....	78,270	100.0	7.3	7.0	13.2	11.6	13.5	13.9	14.8	12.3	6.5	...	...	...
\$600.00-\$649.90 .....	102,070	100.0	7.3	5.7	12.1	10.0	12.0	12.2	13.7	11.8	10.4	4.9	...	...
\$650.00-\$699.90 .....	118,920	100.0	6.1	5.2	11.1	8.6	10.7	11.3	13.0	11.0	10.5	8.5	3.9	...
\$700.00-\$749.90 .....	155,150	100.0	5.1	4.7	10.5	8.6	9.7	10.5	11.5	10.2	9.6	9.0	7.2	3.2
\$750.00-\$799.90 .....	202,250	100.0	4.7	4.5	10.7	7.7	9.6	9.7	10.2	9.7	8.8	8.7	7.1	8.7
\$800.00-\$849.90 .....	253,520	100.0	4.6	4.3	10.1	7.6	9.0	8.8	9.1	8.8	8.9	8.0	7.1	13.7
\$850.00-\$899.90 .....	301,520	100.0	4.7	4.1	9.5	7.3	8.8	8.5	9.0	8.2	7.9	7.6	7.0	17.4
\$900.00-\$949.90 .....	315,350	100.0	6.2	5.1	9.0	7.3	9.2	8.4	8.5	7.6	7.4	6.7	6.2	18.5
\$950.00-\$999.90 .....	301,510	100.0	6.4	5.1	8.9	7.0	8.7	8.4	8.3	7.1	7.2	6.4	5.7	20.8
\$1,000.00-\$1,049.90 .....	280,690	100.0	6.3	4.8	8.5	6.7	8.9	8.4	8.5	7.1	6.8	6.2	5.6	22.1
\$1,050.00-\$1,099.90 .....	223,490	100.0	6.0	5.2	8.1	6.5	8.8	8.4	8.3	7.2	6.4	6.2	5.4	23.5
\$1,100.00-\$1,149.90 .....	182,050	100.0	5.8	5.1	7.7	6.8	8.8	8.2	8.0	6.9	6.1	6.1	5.8	24.6
\$1,150.00-\$1,199.90 .....	156,720	100.0	6.8	5.4	7.6	6.3	8.0	8.1	7.6	6.9	6.1	5.6	5.2	26.5
\$1,200.00-\$1,249.90 .....	130,940	100.0	6.7	5.0	7.8	6.7	8.5	7.9	8.1	6.6	6.1	5.8	5.2	25.6
\$1,250.00-\$1,299.90 .....	112,190	100.0	6.0	5.5	8.8	6.6	7.9	7.9	7.9	6.4	5.5	4.9	4.9	27.5
\$1,300.00-\$1,349.90 .....	73,100	100.0	5.5	5.7	8.4	7.1	8.2	7.4	7.6	5.9	6.0	5.0	5.0	28.0
\$1,350.00-\$1,399.90 .....	52,870	100.0	5.4	5.3	9.6	6.9	7.7	8.2	8.0	6.5	5.7	4.5	4.7	27.5
\$1,400.00 or more .....	167,440	100.0	5.3	5.5	9.3	7.5	7.5	7.3	6.8	5.8	5.3	5.2	4.3	30.2

<sup>1</sup> Includes 24,660 husbands.

<sup>2</sup> Includes 88,720 widowers.

CONTACT: Barbara Lingg/Salvatore Gallicchio (410) 965-0156/0158 for further information.

5.H OASDI Current-Pay Benefits: Beneficiary Families

Table 5.H1.—Number and average monthly family benefit for selected family groups, 1945–2000

[Data for 1985–2000 based on 10-percent sample. Data for prior years based on different sampling rates]

December <sup>1</sup>	Retired-worker families				Survivor families				Disabled-worker families					
	Worker only			Worker and wife <sup>2</sup>	Non-disabled widow only	Widowed mother or father and—			Worker only			Worker, wife, <sup>3</sup> and—		Worker and spouse
	Total	Men	Women			1 child	2 children	3 or more children	Total	Men	Women	1 child	2 or more children	
Number (in thousands)														
1945.....	416	338	78	181	95	86	48	24	...	...	...	...	...	...
1950.....	1,240	939	301	498	314	82	53	33	...	...	...	...	...	...
1955.....	3,266	2,054	1,212	1,124	700	126	86	80	...	...	...	...	...	...
1960.....	5,742	2,922	2,820	2,122	1,527	172	113	114	357	261	96	22	32	22
1965.....	8,386	4,137	4,249	2,400	2,332	182	135	153	714	481	232	54	109	30
1970.....	10,533	4,904	5,629	2,457	3,080	183	155	182	1,054	680	374	77	164	43
1975.....	13,520	6,134	7,385	2,618	3,606	221	182	176	1,750	1,080	671	137	250	66
1980.....	16,314	7,286	9,028	2,736	4,033	239	184	134	2,061	1,257	804	154	228	80
1982.....	17,519	7,852	9,667	2,784	4,191	236	165	106	1,969	1,208	760	124	163	78
1983.....	18,162	8,166	9,996	2,830	4,271	161	141	92	1,961	1,215	746	85	143	80
1984.....	18,613	8,362	10,251	2,839	4,520	159	135	79	1,993	1,241	752	83	140	76
1985.....	19,132	8,601	10,531	2,861	4,606	158	131	74	2,039	1,267	772	84	140	76
1986.....	19,664	8,849	10,816	2,883	4,666	151	123	68	2,096	1,301	795	82	136	74
1987.....	20,137	9,064	11,074	2,893	4,709	141	115	62	2,154	1,338	816	79	132	74
1988.....	20,567	9,264	11,302	2,896	4,749	137	112	61	2,194	1,353	841	77	125	71
1989.....	21,036	9,495	11,541	2,903	4,788	137	109	58	2,262	1,390	872	75	120	67
1990.....	21,537	9,752	11,786	2,914	4,825	133	106	57	2,370	1,448	922	75	118	63
1991.....	21,978	9,985	11,992	2,918	4,850	130	106	55	2,523	1,529	994	76	119	61
1992.....	22,434	10,218	12,216	2,928	4,871	129	103	54	2,738	1,643	1,094	78	125	61
1993.....	22,796	10,404	12,392	2,912	4,870	126	103	53	2,935	1,743	1,192	78	127	59
1994.....	23,124	10,573	12,552	2,885	4,862	123	100	51	3,121	1,830	1,292	76	128	57
1995.....	23,433	10,732	12,701	2,845	4,841	120	97	49	3,305	1,909	1,396	75	124	55
1996.....	23,705	10,874	12,831	2,799	4,815	117	78	41	3,473	1,973	1,500	61	104	53
1997.....	24,124	11,027	13,097	2,759	4,657	113	74	37	3,593	2,006	1,588	57	91	53
1998.....	24,409	11,163	13,246	2,703	4,589	111	69	34	3,769	2,074	1,695	52	80	53
1999.....	24,730	11,337	13,394	2,651	4,536	107	67	32	3,924	2,131	1,793	49	72	52
2000.....	25,452	11,780	13,672	2,638	4,491	102	65	30	4,080	2,191	1,890	45	65	50
Average monthly family benefit														
1945.....	\$23.50	\$24.50	\$19.50	\$38.50	\$20.20	\$34.10	\$47.70	\$50.40	...	...	...	...	...	...
1950.....	42.20	44.60	34.80	71.70	36.50	76.90	93.90	92.40	...	...	...	...	...	...
1955.....	59.10	64.60	49.80	103.50	48.70	106.80	135.40	133.20	...	...	...	...	...	...
1960.....	69.90	79.90	59.60	123.90	57.70	131.70	188.00	181.70	\$87.90	\$91.90	\$76.90	\$184.70	\$192.20	\$135.50
1965.....	80.10	90.50	70.00	141.50	73.90	153.00	219.80	218.10	95.40	100.70	85.00	201.00	216.30	145.90
1970.....	114.20	128.70	101.60	198.90	102.40	213.00	291.10	289.90	128.10	136.30	113.10	264.10	273.20	199.20
1975.....	201.60	225.50	181.80	343.90	195.90	367.20	468.60	461.80	218.90	240.00	185.00	441.00	454.00	344.00
1980.....	333.00	377.10	297.40	566.60	311.60	612.80	759.20	740.50	355.40	396.20	291.70	727.00	746.10	573.00
1982.....	408.90	465.50	362.90	702.50	379.00	735.60	885.50	867.90	424.20	474.20	344.70	847.40	858.20	690.70
1983.....	429.70	490.00	380.40	742.90	400.60	774.80	923.00	884.50	439.40	490.90	355.40	867.90	881.80	716.20
1984.....	448.20	511.60	396.40	781.20	416.30	805.30	948.30	906.60	454.00	507.60	365.70	881.50	885.50	740.40
1985.....	465.80	531.80	412.00	813.90	434.30	829.60	981.50	924.90	466.90	523.10	374.60	898.10	895.20	765.00
1986.....	475.20	542.60	420.10	831.30	444.90	841.70	994.00	939.80	470.70	527.80	377.40	896.90	888.30	773.30
1987.....	499.20	570.40	440.80	873.30	468.70	882.10	1,032.30	968.90	491.60	552.00	392.60	929.40	918.30	815.50
1988.....	522.70	597.20	461.70	914.10	493.60	921.80	1,070.40	1,012.90	512.20	576.10	409.50	960.20	938.40	855.40
1989.....	552.10	630.70	487.40	965.60	522.80	967.80	1,120.00	1,064.60	539.30	607.10	431.20	1,009.40	971.90	903.70
1990.....	588.30	671.90	519.10	1,026.60	557.90	1,020.20	1,177.70	1,124.60	570.40	642.80	456.80	1,062.10	1,016.00	960.80
1991.....	614.70	702.00	542.10	1,071.70	584.90	1,059.80	1,216.80	1,160.60	592.30	668.40	475.50	1,098.00	1,043.30	1,004.70
1992.....	637.80	728.10	562.30	1,110.50	609.00	1,086.90	1,252.40	1,190.80	609.50	688.70	490.70	1,122.10	1,057.40	1,045.00
1993.....	659.10	751.90	581.20	1,145.40	632.20	1,114.20	1,282.60	1,229.40	625.50	707.20	506.00	1,143.00	1,074.20	1,078.20
1994.....	682.30	777.80	601.80	1,183.70	657.10	1,150.10	1,328.40	1,271.00	646.20	731.80	525.00	1,177.60	1,100.00	1,118.60
1995.....	704.80	803.00	621.80	1,220.60	681.60	1,184.50	1,365.50	1,299.80	667.60	757.40	544.80	1,205.50	1,130.90	1,159.90
1996.....	730.00	831.10	644.20	1,262.10	708.70	1,222.50	1,450.60	1,347.20	690.60	785.30	566.00	1,245.90	1,148.50	1,200.60
1997.....	750.20	853.70	663.10	1,294.60	733.20	1,250.30	1,502.60	1,358.00	708.00	806.60	583.60	1,280.20	1,165.90	1,238.50
1998.....	765.10	870.50	676.40	1,317.70	750.90	1,277.00	1,537.70	1,393.20	720.00	820.20	597.40	1,300.40	1,189.40	1,261.90
1999.....	789.80	898.60	697.70	1,356.80	776.60	1,325.40	1,590.40	1,446.30	741.20	844.50	618.50	1,344.90	1,224.20	1,295.30
2000.....	830.10	945.90	730.30	1,419.90	812.30	1,387.90	1,675.40	1,513.20	773.60	880.70	649.40	1,394.20	1,274.30	1,355.50

<sup>1</sup> Data not available for 1981.

<sup>2</sup> Wife's entitlement based on age.

<sup>3</sup> Wife's entitlement based on care of children.

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

Table 5.H2.—Number and average primary insurance amount and average monthly family benefit for selected family groups, December 2000

[Numbers in thousands. Based on 10-percent sample]

Family classification <sup>1</sup>	Number of <sup>2</sup> —		Average	
	Families	Beneficiaries	Primary insurance amount	Monthly family benefit
<b>Retired-worker families:</b>				
Worker only .....	25,452	25,452	\$827.50	\$830.10
Men.....	11,780	11,780	1,037.80	945.90
Full benefit.....	3,684	3,684	1,081.70	1,122.00
Reduced benefit .....	8,096	8,096	1,017.80	865.80
Women .....	13,672	13,672	646.30	730.30
Full benefit.....	3,472	3,472	737.90	844.30
Reduced benefit .....	10,200	10,200	615.10	661.60
Worker and wife .....	2,638	5,276	1,066.50	1,419.90
Full worker benefit .....	909	1,818	1,129.40	1,660.00
Reduced worker benefit.....	1,729	3,458	1,033.40	1,293.70
Worker and husband.....	32	63	522.80	729.20
Worker and children .....	270	591	955.20	1,369.60
Male worker <sup>3</sup> .....	241	529	986.70	1,412.90
Female worker <sup>4</sup> .....	30	63	699.60	1,018.60
Worker, wife, and children .....	105	342	996.70	1,640.30
Worker, wife, and 1 child .....	86	259	1,007.80	1,654.90
Full worker benefit .....	27	80	1,041.70	1,845.00
Reduced worker benefit.....	60	178	992.60	1,569.50
Worker, wife, and 2 or more children.....	19	83	945.20	1,573.30
Full worker benefit .....	5	24	957.70	1,716.40
Reduced worker benefit.....	13	59	940.00	1,514.40
<b>Survivors families:</b>				
Nondisabled widow or widower only .....	4,528	4,528	952.60	810.60
Full benefit.....	1,899	1,899	958.80	909.90
Reduced benefit .....	2,628	2,628	948.20	738.90
Nondisabled widow or widower and children ..	95	197	875.20	1,407.30
Full benefit.....	59	121	860.20	1,434.50
Reduced benefit .....	36	75	899.30	1,363.40
Disabled widow or widower only .....	183	183	949.00	517.80
Widowed mother or father and children .....	196	530	934.70	1,501.70
1 child .....	102	203	933.50	1,387.90
2 children .....	65	194	964.00	1,675.40
3 or more children.....	30	132	875.40	1,513.20
Children only .....	1,055	1,443	778.60	741.00
1 child .....	776	776	780.70	584.80
2 children .....	200	399	786.20	1,155.30
3 or more children.....	79	267	738.00	1,229.20
Parents.....	2	2	888.20	720.00
<b>Disabled-worker families:</b>				
Worker only .....	4,080	4,080	777.00	773.60
Men.....	2,191	2,191	886.20	880.70
Women .....	1,890	1,890	650.40	649.40
Worker and spouse <sup>5</sup> .....	50	101	1,085.70	1,355.50
Worker and children .....	793	2,025	837.80	1,206.20
Male worker.....	507	1,308	891.40	1,289.90
Female worker.....	285	717	742.40	1,057.60
Worker, wife, and children .....	110	438	899.50	1,323.40
1 child .....	45	136	935.70	1,394.20
2 or more children.....	65	302	874.30	1,274.30
Worker, husband, and children.....	2	8	719.10	1,032.10

<sup>1</sup> The term "full benefit" applies to benefits not subject to actuarial reduction and the term "reduced benefit" applies to benefits subject to actuarial reduction.

<sup>2</sup> Provisions for Railroad Retirement beneficiaries are described in the section Social Security (Old-Age, Survivors, and Disability Insurance).

<sup>3</sup> Includes 168,700 families with reduced retired-worker benefits.

<sup>4</sup> Includes 29,700 families with reduced retired-worker benefits.

<sup>5</sup> Where the disabled worker's spouse is dually entitled as a retired worker, the benefit amount shown for the spouse represents the difference between the entitlement amount as a spouse and as a retired worker.

5.H OASDI Current-Pay Benefits: Beneficiary Families

Table 5.H3.—Number and percentage distribution of **retired-worker** and **disabled-worker families**, by monthly benefit for selected family groups, December 2000<sup>1</sup>

[Based on 10-percent sample]

Monthly family benefit <sup>2</sup>	Retired worker only		Retired worker and wife	Retired worker, wife, and—		Disabled worker only		Disabled worker, wife, and—	
	Men	Women		1 child	2 or more children	Men	Women	1 child	2 or more children
Total number.....	11,780,000	13,672,390	2,638,180	86,220	18,730	2,190,550	1,889,500	45,200	65,130
Total percent.....	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0
Less than \$100.00.....	.2	.2	.1	...	.1	.2	.2	.1	.1
\$100.00–\$149.90.....	.5	.5	.2	.1	.2	.2	.6	...	.1
\$150.00–\$199.90.....	.8	.8	.3	.2	.2	.6	1.5	.1	.1
\$200.00–\$249.90.....	.9	1.1	.4	.3	.3	.8	2.3	.1	.2
\$250.00–\$299.90.....	1.1	1.7	.5	.3	.5	1.2	3.0	.1	.2
\$300.00–\$349.90.....	1.2	2.3	.6	.6	.5	1.6	3.7	.2	.3
\$350.00–\$399.90.....	1.6	3.5	.7	.7	.6	1.7	3.9	.2	.2
\$400.00–\$449.90.....	1.9	5.6	.8	.8	.9	2.5	5.5	.2	.4
\$450.00–\$499.90.....	2.3	8.3	.8	.8	1.1	4.4	9.8	.8	1.4
\$500.00–\$549.90.....	2.4	8.9	.9	.8	1.3	4.8	9.5	1.4	2.0
\$550.00–\$599.90.....	2.6	7.2	1.1	1.2	1.3	5.0	8.8	1.4	2.1
\$600.00–\$649.90.....	2.8	6.3	1.3	1.3	1.4	5.4	8.0	1.7	2.2
\$650.00–\$699.90.....	3.1	5.5	1.4	1.7	2.6	5.2	7.0	1.8	2.5
\$700.00–\$749.90.....	3.6	5.2	1.5	1.6	2.9	5.1	6.1	1.9	2.7
\$750.00–\$799.90.....	4.1	4.9	1.5	2.1	2.9	5.0	5.2	2.2	3.5
\$800.00–\$849.90.....	4.9	5.0	1.6	1.5	2.5	4.9	4.3	2.5	2.9
\$850.00–\$899.90.....	5.8	5.0	1.6	1.4	1.4	4.9	3.8	2.3	3.0
\$900.00–\$949.90.....	6.6	4.7	1.8	1.1	1.7	4.6	3.1	3.0	3.2
\$950.00–\$999.90.....	7.2	4.3	1.9	1.1	2.3	4.5	2.6	3.1	4.1
\$1,000.00–\$1,049.90.....	8.4	3.9	2.0	1.4	1.5	4.3	2.2	4.1	4.9
\$1,050.00–\$1,099.90.....	7.0	3.1	2.3	1.2	2.1	4.0	1.7	4.1	4.5
\$1,100.00–\$1,149.90.....	5.9	2.5	2.5	1.5	1.5	3.8	1.4	3.8	4.7
\$1,150.00–\$1,199.90.....	5.0	2.0	2.8	1.6	2.0	3.8	1.2	3.6	4.7
\$1,200.00–\$1,249.90.....	4.4	1.7	3.1	1.4	1.6	4.2	1.2	3.9	3.9
\$1,250.00–\$1,299.90.....	3.9	1.5	3.6	1.7	1.7	4.8	1.1	3.8	4.0
\$1,300.00–\$1,349.90.....	2.8	1.0	4.4	1.6	1.4	4.0	.8	3.5	3.1
\$1,350.00–\$1,399.90.....	2.1	.8	4.8	1.6	1.4	3.3	.6	3.5	3.5
\$1,400.00–\$1,449.90.....	1.6	.6	5.0	1.5	2.2	<sup>3</sup> 5.2	<sup>3</sup> 3.8	3.5	2.9
\$1,450.00–\$1,499.90.....	1.3	.4	5.9	2.0	1.7	...	...	2.9	2.5
\$1,500.00–\$1,549.90.....	<sup>4</sup> 3.5	<sup>4</sup> 1.1	6.0	2.1	2.5	...	...	3.0	2.8
\$1,550.00–\$1,599.90.....	...	...	5.3	2.9	2.5	...	...	2.7	2.2
\$1,600.00–\$1,649.90.....	...	...	4.6	3.1	2.2	...	...	2.6	1.9
\$1,650.00–\$1,699.90.....	...	...	4.1	3.7	2.9	...	...	2.7	2.0
\$1,700.00–\$1,749.90.....	...	...	3.6	3.8	3.3	...	...	2.5	1.8
\$1,750.00–\$1,799.90.....	...	...	3.1	3.8	3.4	...	...	2.9	1.7
\$1,800.00–\$1,849.90.....	...	...	2.7	4.3	2.7	...	...	2.9	2.2
\$1,850.00–\$1,899.90.....	...	...	2.3	4.5	3.5	...	...	3.0	2.1
\$1,900.00–\$1,949.90.....	...	...	1.9	4.6	3.6	...	...	2.8	2.0
\$1,950.00–\$1,999.90.....	...	...	1.7	4.7	3.6	...	...	2.5	1.6
\$2,000.00–\$2,049.90.....	...	...	1.4	4.3	2.8	...	...	2.1	1.3
\$2,050.00–\$2,099.90.....	...	...	1.2	3.2	2.5	...	...	1.9	1.4
\$2,100.00–\$2,149.90.....	...	...	1.0	3.0	3.2	...	...	1.6	1.4
\$2,150.00–\$2,199.90.....	...	...	.8	3.1	2.8	...	...	1.7	1.0
\$2,200.00–\$2,249.90.....	...	...	.7	2.8	2.1	...	...	<sup>5</sup> 5.6	<sup>5</sup> 5.7
\$2,250.00–\$2,299.90.....	...	...	.6	2.2	1.5	...	...	...	...
\$2,300.00–\$2,349.90.....	...	...	.5	1.9	1.7	...	...	...	...
\$2,350.00–\$2,399.90.....	...	...	.4	1.6	1.7	...	...	...	...
\$2,400.00–\$2,449.90.....	...	...	.5	1.3	1.3	...	...	...	...
\$2,450.00–\$2,499.90.....	...	...	.4	1.1	1.1	...	...	...	...
\$2,500.00 or more.....	...	...	1.8	4.9	7.0	...	...	...	...
<b>Average monthly benefit per family.....</b>	<b>\$945.90</b>	<b>\$730.30</b>	<b>\$1,419.90</b>	<b>\$1,654.90</b>	<b>\$1,573.30</b>	<b>\$880.70</b>	<b>\$649.40</b>	<b>\$1,394.20</b>	<b>\$1,274.30</b>

<sup>1</sup> Provisions for Railroad Retirement beneficiaries are described in the section Social Security (Old-Age, Survivors, and Disability Insurance).

<sup>2</sup> Cases involving actuarial reduction may be represented in all benefit intervals for which values are shown.

<sup>3</sup> \$1,400 or more.

<sup>4</sup> \$1,500 or more.

<sup>5</sup> \$2,200 or more.

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

Table 5.H4.—Number and percentage distribution of **survivor families**, by monthly benefit for selected family groups, December 2000

[Based on 10-percent sample]

Monthly family benefit	Widowed mother or father and—			Children only			Nondisabled widow only	Disabled widow only
	1 child	2 children	3 or more children	1 child	2 children	3 or more children		
Total number .....	101,690	64,730	29,820	776,240	199,700	79,020	4,491,310	178,380
Total percent .....	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0
Less than \$100.00 .....	...	...	.1	.5	.5	.6	.2	3.6
\$100.00–\$149.90 .....	.1	.1	...	1.3	.3	.4	.2	3.0
\$150.00–\$199.90 .....	.2	.2	.2	1.8	.6	.8	.3	3.9
\$200.00–\$249.90 .....	.3	.3	.7	2.1	1.0	1.6	.9	5.0
\$250.00–\$299.90 .....	.4	.3	.7	2.2	1.4	1.8	1.6	5.1
\$300.00–\$349.90 .....	.5	.5	.8	9.0	1.5	2.1	2.3	6.7
\$350.00–\$399.90 .....	.6	.6	1.0	7.9	1.4	1.8	2.3	7.2
\$400.00–\$449.90 .....	.7	.6	.8	7.8	1.5	2.2	2.8	7.5
\$450.00–\$499.90 .....	.9	.6	.6	7.8	2.2	2.3	3.4	7.3
\$500.00–\$549.90 .....	.8	.8	1.5	7.8	1.7	2.3	3.7	7.0
\$550.00–\$599.90 .....	.8	.6	1.0	7.3	1.7	1.9	4.5	6.4
\$600.00–\$649.90 .....	1.1	.9	1.4	8.2	2.0	2.1	5.6	5.7
\$650.00–\$699.90 .....	1.9	1.6	2.2	6.3	3.2	3.9	6.3	5.2
\$700.00–\$749.90 .....	2.2	2.2	3.1	5.6	4.1	4.2	6.9	5.0
\$750.00–\$799.90 .....	2.7	2.6	3.1	4.7	4.1	4.5	7.1	4.2
\$800.00–\$849.90 .....	2.8	2.5	3.8	3.9	4.3	4.1	7.7	3.8
\$850.00–\$899.90 .....	2.9	2.6	4.0	3.6	3.9	4.1	8.2	4.6
\$900.00–\$949.90 .....	2.9	2.2	2.8	3.4	4.0	3.8	7.5	4.1
\$950.00–\$999.90 .....	3.0	1.5	2.4	3.0	3.8	2.8	6.3	2.4
\$1,000.00–\$1,049.90 .....	3.5	1.7	1.9	2.2	3.7	2.4	5.1	<sup>1</sup> 2.1
\$1,050.00–\$1,099.90 .....	3.0	1.7	2.0	1.5	3.8	2.0	3.8	...
\$1,100.00–\$1,149.90 .....	3.6	1.9	1.8	<sup>2</sup> 1.9	3.5	1.9	2.9	...
\$1,150.00–\$1,199.90 .....	3.6	1.6	2.0	...	3.5	2.0	2.3	...
\$1,200.00–\$1,249.90 .....	3.5	1.6	1.7	...	3.3	1.9	1.9	...
\$1,250.00–\$1,299.90 .....	3.4	1.7	2.0	...	3.2	2.1	1.6	...
\$1,300.00–\$1,349.90 .....	3.4	2.0	2.2	...	2.9	1.8	1.1	...
\$1,350.00–\$1,399.90 .....	3.2	2.1	1.6	...	2.7	1.9	.8	...
\$1,400.00–\$1,449.90 .....	3.2	2.0	2.3	...	2.5	1.9	<sup>3</sup> 2.6	...
\$1,450.00–\$1,499.90 .....	3.1	1.7	2.1	...	2.1	1.7	...	...
\$1,500.00–\$1,549.90 .....	3.4	2.1	1.9	...	2.0	1.7	...	...
\$1,550.00–\$1,599.90 .....	2.9	2.0	2.0	...	2.0	1.6	...	...
\$1,600.00–\$1,649.90 .....	2.8	2.0	1.9	...	1.8	1.6	...	...
\$1,650.00–\$1,699.90 .....	2.6	2.6	2.2	...	1.7	1.4	...	...
\$1,700.00–\$1,749.90 .....	2.8	2.9	2.4	...	1.6	2.0	...	...
\$1,750.00–\$1,799.90 .....	2.7	3.0	2.3	...	1.6	2.0	...	...
\$1,800.00–\$1,849.90 .....	2.8	3.3	2.7	...	1.9	2.0	...	...
\$1,850.00–\$1,899.90 .....	3.2	2.9	2.6	...	1.8	1.9	...	...
\$1,900.00–\$1,949.90 .....	3.2	3.0	3.4	...	1.7	1.7	...	...
\$1,950.00–\$1,999.90 .....	2.6	2.9	2.2	...	1.5	1.8	...	...
\$2,000.00–\$2,049.90 .....	2.4	2.4	2.3	...	1.5	1.5	...	...
\$2,050.00–\$2,099.90 .....	2.0	2.1	1.7	...	1.4	1.1	...	...
\$2,100.00–\$2,149.90 .....	2.0	2.2	1.6	...	1.2	1.1	...	...
\$2,150.00–\$2,199.90 .....	1.5	2.7	1.8	...	.9	1.4	...	...
\$2,200.00–\$2,249.90 .....	<sup>4</sup> 4.9	2.6	1.9	...	<sup>4</sup> 3.1	1.3	...	...
\$2,250.00–\$2,299.90 .....	...	2.7	1.4	...	...	1.0	...	...
\$2,300.00–\$2,349.90 .....	...	2.1	1.9	...	...	1.1	...	...
\$2,350.00–\$2,399.90 .....	...	1.9	1.5	...	...	.9	...	...
\$2,400.00–\$2,449.90 .....	...	2.0	1.5	...	...	.8	...	...
\$2,450.00–\$2,499.90 .....	...	1.8	1.2	...	...	.9	...	...
\$2,500.00 or more .....	...	11.9	9.0	...	...	3.9	...	...
<b>Average monthly benefit per family .....</b>	<b>\$1,387.90</b>	<b>\$1,675.40</b>	<b>\$1,513.20</b>	<b>\$584.80</b>	<b>\$1,155.30</b>	<b>\$1,229.20</b>	<b>\$812.30</b>	<b>\$522.20</b>

<sup>1</sup> \$1,000 or more.

<sup>2</sup> \$1,100 or more.

<sup>3</sup> \$1,400 or more.

<sup>4</sup> \$2,200 or more.

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

Table 5.J1.—Estimated total benefits paid, by program, calendar year 2000 <sup>1</sup>

[In millions. Based on 10-percent sample]

State	Total	Retirement	Survivors	Disability
Total.....	\$407,431	\$274,645	\$77,848	\$54,938
Alabama.....	6,942	4,186	1,483	1,272
Alaska.....	465	291	94	80
Arizona.....	7,163	5,026	1,187	950
Arkansas.....	4,250	2,633	845	772
California.....	38,138	26,460	6,864	4,814
Colorado.....	4,698	3,148	882	667
Connecticut.....	5,711	4,219	896	597
Delaware.....	1,268	872	229	167
District of Columbia.....	579	384	112	83
Florida.....	28,700	20,622	4,751	3,328
Georgia.....	9,503	5,947	1,872	1,683
Hawaii.....	1,628	1,230	246	152
Idaho.....	1,697	1,176	310	211
Illinois.....	17,530	12,060	3,477	1,993
Indiana.....	9,380	6,336	1,846	1,198
Iowa.....	4,891	3,417	968	505
Kansas.....	4,057	2,821	789	448
Kentucky.....	6,203	3,505	1,324	1,373
Louisiana.....	5,906	3,350	1,562	995
Maine.....	2,075	1,360	371	344
Maryland.....	6,622	4,541	1,292	789
Massachusetts.....	9,696	6,691	1,656	1,350
Michigan.....	15,892	10,585	3,151	2,157
Minnesota.....	6,633	4,673	1,252	708
Mississippi.....	4,101	2,364	855	883
Missouri.....	8,881	5,876	1,699	1,306
Montana.....	1,376	926	267	182
Nebraska.....	2,533	1,778	493	262
Nevada.....	2,609	1,849	402	358
New Hampshire.....	1,849	1,298	306	245
New Jersey.....	13,521	9,712	2,319	1,489
New Mexico.....	2,303	1,508	456	338
New York.....	28,691	19,916	4,912	3,862
North Carolina.....	11,651	7,652	1,977	2,021
North Dakota.....	972	645	232	95
Ohio.....	17,724	11,698	3,877	2,149
Oklahoma.....	5,141	3,358	1,081	703
Oregon.....	5,200	3,684	908	609
Pennsylvania.....	22,121	15,315	4,464	2,342
Rhode Island.....	1,739	1,237	259	243
South Carolina.....	5,908	3,760	1,060	1,088
South Dakota.....	1,124	766	240	118
Tennessee.....	8,537	5,332	1,699	1,505
Texas.....	22,883	14,963	5,139	2,781
Utah.....	2,152	1,530	386	236
Vermont.....	918	624	159	135
Virginia.....	9,060	5,929	1,741	1,390
Washington.....	7,898	5,564	1,366	968
West Virginia.....	3,488	1,947	837	705
Wisconsin.....	8,347	5,936	1,522	889
Wyoming.....	690	485	118	87
Outlying areas:				
American Samoa.....	28	9	9	10
Guam.....	63	39	17	7
Northern Mariana Islands.....	8	4	3	1
Puerto Rico.....	3,940	1,941	826	1,173
Virgin Islands.....	97	67	17	12
Foreign countries.....	2,226	1,381	735	110

<sup>1</sup>Unnegotiated checks not deducted. Excludes lump-sum death payments.

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

Table 5.J2.—Number, by type of benefit, December 2000

[Based on 10-percent sample]

State	Social Security program								
	Total	Retirement			Survivors		Disability		
		Retired workers <sup>1</sup>	Spouses	Children	Widows, widowers, and parents	Children	Disabled workers	Spouses	Children
Total <sup>2</sup> .....	45,417,470	28,506,060	2,797,170	457,960	5,103,060	1,877,940	5,035,840	164,850	1,474,590
Alabama .....	826,710	457,990	47,810	9,980	105,650	40,480	121,120	4,410	39,270
Alaska .....	54,950	31,320	2,650	1,020	4,940	4,600	7,460	220	2,740
Arizona .....	791,330	517,120	50,410	7,000	76,430	29,410	84,500	2,280	24,180
Arkansas .....	517,230	296,920	29,500	5,100	62,820	23,050	75,390	2,120	22,330
California .....	4,208,290	2,708,560	287,130	50,170	428,280	169,740	437,270	12,770	114,370
Colorado .....	535,270	334,580	37,430	3,910	57,370	21,070	61,280	1,700	17,930
Connecticut .....	578,650	404,160	27,050	5,070	52,550	19,630	53,190	1,330	15,670
Delaware .....	134,900	87,530	7,460	1,390	14,080	5,010	14,920	350	4,160
District of Columbia .....	74,030	48,070	2,920	770	7,970	4,650	8,470	70	1,110
Florida .....	3,193,390	2,163,900	187,490	29,420	310,400	103,830	305,290	8,550	84,510
Georgia .....	1,106,410	647,960	53,650	10,370	124,060	61,540	157,920	4,530	46,380
Hawaii .....	184,140	131,010	9,890	2,400	15,920	6,860	13,510	400	4,150
Idaho .....	194,030	124,620	13,840	1,570	19,890	7,790	20,020	730	5,570
Illinois .....	1,842,350	1,196,410	105,870	17,370	211,000	79,880	175,060	4,800	51,960
Indiana .....	994,060	629,500	57,090	8,890	113,640	40,720	108,210	2,810	33,200
Iowa .....	540,360	351,580	39,960	4,100	65,500	16,900	47,800	1,260	13,260
Kansas .....	440,010	284,660	28,920	3,410	50,390	16,210	42,390	810	13,220
Kentucky .....	739,010	382,810	47,650	7,060	98,620	31,130	125,650	6,840	39,250
Louisiana .....	710,870	362,400	57,010	9,640	109,570	44,120	88,460	5,480	34,190
Maine .....	251,480	153,520	14,280	2,170	26,370	8,100	34,700	1,120	11,220
Maryland .....	723,250	473,330	38,520	6,820	79,380	35,860	70,200	1,140	18,000
Massachusetts .....	1,063,950	697,230	52,190	9,640	105,620	34,470	125,430	2,650	36,720
Michigan .....	1,644,640	1,017,370	103,800	16,520	191,860	69,730	182,760	5,410	57,190
Minnesota .....	738,750	490,040	49,230	6,030	82,350	25,210	66,600	1,230	18,060
Mississippi .....	516,260	271,660	24,110	7,310	61,370	31,050	85,700	3,420	31,640
Missouri .....	1,004,500	620,490	57,480	8,900	111,860	41,810	123,130	3,730	37,100
Montana .....	157,720	98,240	11,140	1,530	18,060	6,180	16,870	670	5,030
Nebraska .....	284,370	186,000	20,790	2,230	32,440	9,530	25,380	560	7,440
Nevada .....	287,200	194,640	14,360	2,780	25,170	10,320	31,400	620	7,910
New Hampshire .....	200,490	134,170	9,490	1,570	18,730	6,970	22,210	490	6,860
New Jersey .....	1,352,210	927,740	59,560	12,380	137,120	50,380	127,330	3,200	34,500
New Mexico .....	280,660	165,580	21,650	3,560	30,710	15,770	31,620	1,410	10,360
New York .....	3,005,760	1,961,260	151,660	33,800	301,990	114,200	333,870	11,090	97,890
North Carolina .....	1,349,740	836,050	59,330	10,340	136,670	56,660	193,120	4,730	52,840
North Dakota .....	114,100	69,730	10,600	860	17,090	3,920	9,080	300	2,520
Ohio .....	1,918,410	1,172,680	144,440	17,300	253,930	73,150	195,430	5,720	55,760
Oklahoma .....	594,020	364,720	37,870	4,970	73,580	26,810	65,800	2,290	17,980
Oregon .....	568,250	378,090	36,530	4,990	57,690	19,320	57,030	1,500	13,100
Pennsylvania .....	2,357,380	1,545,640	143,960	18,510	290,060	80,580	213,630	7,590	57,410
Rhode Island .....	191,680	130,530	7,100	1,560	16,330	6,240	22,970	580	6,370
South Carolina .....	689,020	411,030	30,720	5,970	71,530	35,530	102,370	2,580	29,290
South Dakota .....	136,050	85,470	10,710	1,060	16,800	5,970	12,020	170	3,850
Tennessee .....	995,810	577,560	55,440	9,110	118,830	46,380	142,960	4,930	40,600
Texas .....	2,638,130	1,577,730	201,100	32,430	342,880	137,980	254,380	11,530	80,100
Utah .....	242,280	156,820	18,330	2,810	21,590	12,630	21,500	580	8,020
Vermont .....	104,680	65,820	5,870	1,040	10,540	3,630	12,920	500	4,360
Virginia .....	1,035,090	637,040	58,360	9,000	117,330	44,100	127,610	4,440	37,210
Washington .....	845,210	554,450	55,840	7,250	83,740	30,140	89,640	2,120	22,030
West Virginia .....	390,430	199,320	29,810	4,050	59,700	16,110	60,940	3,990	16,510
Wisconsin .....	899,520	603,380	54,380	7,570	96,180	31,190	82,340	1,480	23,000
Wyoming .....	77,240	50,570	4,950	590	7,330	2,960	7,940	380	2,520
Outlying areas:									
American Samoa .....	5,410	1,380	180	340	580	850	1,250	90	740
Guam .....	10,710	5,380	1,100	580	1,060	1,400	660	100	430
Northern Mariana Islands .....	1,740	710	130	250	220	290	100	...	40
Puerto Rico .....	665,490	293,610	53,320	15,480	80,110	39,890	124,420	10,070	48,590
Virgin Islands .....	13,430	8,310	940	440	1,140	990	1,170	80	360
Foreign countries .....	393,070	225,890	53,730	7,400	75,780	14,720	11,250	890	3,410

<sup>1</sup> Includes special age-72 beneficiaries.

<sup>2</sup> Includes beneficiaries with unknown state code.

CONTACT: Rona Blumenthal/Salvatore Gallicchio (410) 965-0163/0158 for further information.

Table 5.J3.—Number and total monthly benefit for beneficiaries aged 65 or older, December 2000

[Based on 10-percent sample]

State	Number			Monthly benefit (in thousands)		
	Total	Men	Women	Total	Men	Women
Total <sup>1</sup> .....	32,718,170	13,526,820	19,191,350	\$26,675,290	\$12,877,180	\$13,798,120
Alabama.....	537,650	215,610	322,040	409,640	193,900	215,750
Alaska.....	33,250	15,800	17,450	26,610	14,530	12,080
Arizona.....	574,970	251,860	323,110	475,990	242,580	233,410
Arkansas.....	345,110	141,840	203,270	256,280	123,390	132,890
California.....	3,105,840	1,330,640	1,775,200	2,565,620	1,269,040	1,296,580
Colorado.....	385,050	163,910	221,140	305,310	152,930	152,380
Connecticut.....	447,230	180,760	266,470	405,470	192,650	212,820
Delaware.....	97,450	40,890	56,560	83,510	41,050	42,450
District of Columbia.....	54,790	21,070	33,720	38,310	16,680	21,630
Florida.....	2,407,810	1,037,400	1,370,410	1,972,340	986,430	985,910
Georgia.....	725,980	288,530	437,450	568,910	267,320	301,590
Hawaii.....	142,800	62,600	80,200	115,070	57,160	57,920
Idaho.....	140,590	61,240	79,350	111,820	57,240	54,580
Illinois.....	1,372,310	554,450	817,860	1,183,210	557,770	625,450
Indiana.....	715,980	287,520	428,460	613,390	288,630	324,770
Iowa.....	415,060	170,060	245,000	336,690	162,660	174,030
Kansas.....	332,020	133,990	198,030	278,090	132,300	145,780
Kentucky.....	466,870	188,830	278,040	350,070	166,670	183,400
Louisiana.....	466,440	190,280	276,160	346,130	168,510	177,630
Maine.....	175,730	73,590	102,140	132,470	64,740	67,720
Maryland.....	533,390	215,520	317,870	440,710	207,000	233,710
Massachusetts.....	793,350	315,510	477,840	659,160	306,680	352,480
Michigan.....	1,171,580	483,200	688,380	1,024,480	496,820	527,660
Minnesota.....	560,060	230,390	329,670	450,340	218,240	232,100
Mississippi.....	315,020	125,240	189,780	229,790	107,810	121,980
Missouri.....	706,540	287,590	418,950	568,230	271,090	297,140
Montana.....	112,920	49,380	63,540	89,210	45,220	44,000
Nebraska.....	218,500	89,410	129,090	175,370	84,370	91,000
Nevada.....	205,980	96,360	109,620	172,060	91,280	80,780
New Hampshire.....	146,190	61,690	84,500	122,990	60,780	62,210
New Jersey.....	1,032,770	414,660	618,110	943,400	441,950	501,450
New Mexico.....	191,780	84,860	106,920	144,200	74,610	69,590
New York.....	2,192,600	879,840	1,312,760	1,915,060	888,810	1,026,250
North Carolina.....	918,550	368,100	550,450	722,410	339,440	382,970
North Dakota.....	88,960	36,660	52,300	66,520	32,540	33,980
Ohio.....	1,413,200	575,880	837,320	1,168,940	564,370	604,570
Oklahoma.....	423,460	174,630	248,830	329,270	157,260	172,010
Oregon.....	421,850	179,990	241,860	349,750	173,600	176,140
Pennsylvania.....	1,793,470	714,470	1,079,000	1,510,260	709,270	800,990
Rhode Island.....	142,200	56,530	85,670	118,520	54,490	64,030
South Carolina.....	452,020	183,680	268,340	355,010	170,040	184,970
South Dakota.....	102,900	42,880	60,020	76,370	37,440	38,940
Tennessee.....	663,420	265,420	398,000	516,820	243,860	272,950
Texas.....	1,880,060	792,770	1,087,290	1,478,190	734,300	743,900
Utah.....	175,960	76,420	99,540	144,510	74,280	70,230
Vermont.....	73,720	30,750	42,970	59,410	29,010	30,400
Virginia.....	724,750	293,630	431,120	573,500	271,780	301,720
Washington.....	621,790	264,550	357,240	527,680	262,500	265,180
West Virginia.....	254,990	102,410	152,580	199,920	94,690	105,220
Wisconsin.....	677,680	281,880	395,800	566,840	276,710	290,140
Wyoming.....	55,610	25,100	30,510	45,380	24,120	21,260
Outlying areas:						
American Samoa.....	1,650	720	930	760	390	370
Guam.....	6,120	3,190	2,930	3,410	2,030	1,370
Northern Mariana Islands.....	760	450	310	350	230	110
Puerto Rico.....	367,160	165,320	201,840	188,630	97,670	90,960
Virgin Islands.....	8,660	3,990	4,670	5,820	3,030	2,790
Foreign countries.....	323,500	141,500	182,000	155,510	72,100	83,410

<sup>1</sup>Includes beneficiaries with unknown state code.

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

Table 5.J4.—Total monthly benefit, by type of benefit, December 2000

[In thousands. Based on 10-percent sample]

State	Social Security program								
	Total	Retirement			Survivors		Disability		
		Retired workers <sup>1</sup>	Spouses	Children	Widows, widowers, and parents	Children	Disabled workers	Spouses	Children
Total <sup>2</sup>	\$34,854,200	\$24,075,785	\$1,201,931	\$181,166	\$4,032,189	\$1,030,430	\$3,963,282	\$32,859	\$336,559
Alabama	586,094	364,925	19,959	3,762	75,307	21,151	91,533	825	8,631
Alaska	39,836	25,843	1,054	354	3,627	2,529	5,797	34	599
Arizona	620,816	443,040	22,181	2,689	62,284	15,594	69,008	472	5,548
Arkansas	360,110	230,619	11,596	1,865	43,498	11,690	55,637	380	4,824
California	3,279,164	2,311,844	123,346	19,297	351,822	94,082	349,365	2,547	26,861
Colorado	402,577	275,003	15,915	1,641	45,825	11,882	47,713	347	4,252
Connecticut	495,515	374,403	13,381	2,370	46,283	11,797	43,298	266	3,718
Delaware	109,257	77,040	3,543	578	11,926	2,971	12,146	77	976
District of Columbia	49,383	34,301	1,096	236	5,273	2,001	6,198	13	264
Florida	2,483,561	1,818,566	81,609	11,320	253,045	56,069	241,668	1,780	19,503
Georgia	808,086	526,209	22,973	4,160	89,566	32,618	121,098	841	10,620
Hawaii	142,159	109,261	4,005	937	12,232	3,772	10,860	85	1,007
Idaho	146,087	102,476	5,950	668	16,041	4,218	15,453	149	1,133
Illinois	1,497,284	1,058,759	48,977	7,505	179,654	46,186	142,768	1,018	12,416
Indiana	800,794	556,083	26,350	4,041	95,887	24,181	86,087	602	7,564
Iowa	418,786	296,515	17,540	1,789	53,486	9,633	36,533	265	3,023
Kansas	347,639	246,236	13,070	1,432	42,344	9,004	32,417	176	2,961
Kentucky	519,403	302,999	19,072	2,640	69,820	16,418	98,301	1,363	8,790
Louisiana	490,146	283,904	23,071	3,334	79,306	22,033	69,889	1,135	7,474
Maine	177,175	119,160	5,871	841	19,701	4,452	24,867	174	2,109
Maryland	568,689	402,148	17,122	2,957	63,798	20,128	57,628	254	4,654
Massachusetts	833,030	592,084	23,389	3,956	87,035	20,199	97,607	500	8,262
Michigan	1,355,471	924,577	48,901	7,297	163,145	41,439	154,776	1,210	14,126
Minnesota	570,270	409,342	21,260	2,582	66,329	14,988	51,310	263	4,197
Mississippi	345,057	207,095	9,456	2,585	40,738	15,254	62,843	590	6,497
Missouri	758,648	516,008	24,643	3,683	87,700	22,883	94,843	728	8,159
Montana	117,418	80,414	4,730	574	14,093	3,287	13,097	136	1,088
Nebraska	216,661	154,090	9,095	944	26,511	5,380	18,872	121	1,649
Nevada	227,775	165,658	6,188	1,094	20,693	5,838	26,220	151	1,934
New Hampshire	159,707	115,352	4,343	679	15,694	4,302	17,510	93	1,734
New Jersey	1,166,595	865,187	28,183	5,460	120,477	29,932	107,630	724	9,002
New Mexico	196,600	130,546	8,467	1,237	22,569	7,235	24,103	243	2,200
New York	2,463,458	1,759,515	68,356	14,071	252,908	65,328	277,941	2,258	23,081
North Carolina	998,643	680,305	25,369	4,197	98,313	30,264	147,051	886	12,257
North Dakota	82,083	54,970	4,274	341	13,062	1,995	6,792	60	589
Ohio	1,501,679	1,010,369	64,464	7,330	209,977	41,533	154,119	1,321	12,567
Oklahoma	437,230	293,727	15,665	2,023	56,109	14,295	50,871	450	4,090
Oregon	448,400	323,146	16,195	2,093	47,945	11,059	44,409	356	3,196
Pennsylvania	1,891,167	1,342,184	65,705	8,080	242,475	46,664	171,570	1,456	13,033
Rhode Island	150,039	110,290	3,150	636	13,475	3,487	17,550	93	1,359
South Carolina	504,741	333,830	13,234	2,440	50,728	18,362	78,978	510	6,659
South Dakota	95,829	66,171	4,291	406	12,593	2,995	8,543	28	801
Tennessee	724,754	468,453	23,516	3,608	86,847	23,962	108,196	948	9,224
Texas	1,945,753	1,295,337	83,969	11,583	262,283	73,904	198,514	2,233	17,929
Utah	185,762	132,990	8,196	1,171	18,029	6,985	16,581	105	1,706
Vermont	78,815	54,725	2,485	427	8,320	2,060	9,763	92	943
Virginia	774,442	522,891	25,032	3,736	88,272	24,992	100,062	908	8,549
Washington	681,942	487,407	25,663	3,165	70,952	17,816	70,958	491	5,490
West Virginia	290,021	166,055	12,497	1,617	45,228	8,879	50,733	944	4,068
Wisconsin	717,999	521,393	24,340	3,487	80,573	18,141	64,315	302	5,448
Wyoming	59,582	42,528	2,183	259	5,946	1,734	6,333	71	527
Outlying areas:									
American Samoa	2,284	692	44	99	237	343	745	13	112
Guam	5,319	3,177	289	156	580	569	451	18	80
Northern Mariana Islands	675	340	21	47	86	126	41	...	15
Puerto Rico	327,393	163,066	13,971	3,800	39,123	14,690	82,978	1,548	8,217
Virgin Islands	8,423	5,901	309	139	709	415	849	25	77
Foreign countries	185,733	115,156	12,205	1,693	41,537	6,539	7,689	179	734

<sup>1</sup> Includes special age-72 beneficiaries.

<sup>2</sup> Includes beneficiaries with unknown state code.

CONTACT: Rona Blumenthal/Salvatore Gallicchio (410) 965-0163/0158 for further information.

5.J OASDI Current-Pay Benefits: Geographic Data

Table 5.J5.—Number, by age, December 2000

[Based on 10-percent sample]

State	Total	Age										
		17 or under	18–54	55–61	62–64	65–69	70–74	75–79	80–84	85–89	90–99	100 or older
Total <sup>1</sup>	45,417,470	2,979,420	3,923,630	1,818,670	3,977,580	8,793,000	8,211,020	6,976,700	4,704,280	2,662,000	1,331,690	39,480
Alabama.....	826,710	71,480	93,750	44,900	78,930	154,790	138,030	109,350	72,410	41,370	21,070	630
Alaska.....	54,950	7,420	6,360	2,300	5,620	11,510	8,840	6,530	3,790	1,760	820	...
Arizona.....	791,330	51,230	62,450	29,150	73,530	158,650	146,660	125,250	81,490	43,020	19,420	480
Arkansas.....	517,230	40,330	54,700	28,380	48,710	97,470	85,140	72,430	47,440	28,010	14,190	430
California.....	4,208,290	269,790	342,840	150,990	338,830	829,180	775,890	674,890	451,250	249,750	121,450	3,430
Colorado.....	535,270	35,690	47,880	18,720	47,930	109,620	96,680	79,800	53,250	29,910	15,420	370
Connecticut.....	578,650	30,450	42,050	17,710	41,210	107,720	108,420	98,810	70,890	40,100	20,660	630
Delaware.....	134,900	8,520	11,210	5,140	12,580	27,840	25,610	20,070	13,350	7,170	3,260	150
District of Columbia.....	74,030	5,030	6,620	2,770	4,820	13,190	13,240	11,710	8,680	5,220	2,660	90
Florida.....	3,193,390	180,510	221,300	111,680	272,090	614,320	608,950	532,440	358,600	195,980	95,180	2,340
Georgia.....	1,106,410	94,640	120,110	58,560	107,120	220,440	181,360	144,530	96,960	54,910	27,010	770
Hawaii.....	184,140	10,970	11,660	4,680	14,030	37,060	37,200	32,520	19,720	11,100	5,030	170
Idaho.....	194,030	12,200	14,970	7,340	18,930	39,510	34,450	28,590	20,950	11,430	5,530	130
Illinois.....	1,842,350	113,980	142,620	61,880	151,560	354,040	337,230	293,090	206,450	118,930	60,680	1,890
Indiana.....	994,060	63,180	86,280	38,860	89,760	192,860	180,780	151,850	101,860	58,460	29,240	930
Iowa.....	540,360	24,550	38,000	16,270	46,480	101,190	99,920	87,900	65,240	38,530	21,440	840
Kansas.....	440,010	25,580	34,150	13,270	34,990	83,150	79,190	69,620	51,590	30,220	17,620	630
Kentucky.....	739,010	59,660	96,740	45,330	70,410	134,240	117,430	97,380	63,660	36,110	17,600	450
Louisiana.....	710,870	68,770	77,210	35,080	63,370	130,670	122,240	98,300	62,310	35,200	17,340	380
Maine.....	251,480	16,520	26,680	11,270	21,280	47,800	43,520	38,020	24,700	14,030	7,440	220
Maryland.....	723,250	48,680	55,080	24,530	61,570	144,760	135,780	115,960	75,360	40,440	20,480	610
Massachusetts.....	1,063,950	61,440	99,200	38,330	71,630	194,490	191,990	173,430	123,760	71,350	37,020	1,310
Michigan.....	1,644,640	107,710	148,270	65,730	151,350	310,530	296,340	254,550	170,500	93,480	44,650	1,530
Minnesota.....	738,750	36,000	54,150	21,920	66,620	144,740	134,800	114,620	84,740	51,800	28,500	860
Mississippi.....	516,260	56,630	67,490	30,360	46,760	90,100	80,190	64,060	41,730	25,180	13,250	510
Missouri.....	1,004,500	69,280	94,190	43,550	90,940	191,850	174,920	147,170	99,470	60,850	31,320	960
Montana.....	157,720	10,280	12,860	6,120	15,540	30,310	28,240	22,710	17,110	9,590	4,840	120
Nebraska.....	284,370	14,630	19,920	8,530	22,790	54,880	54,320	45,000	32,170	20,520	11,210	400
Nevada.....	287,200	18,570	20,360	11,810	30,480	65,370	56,430	43,860	23,690	11,550	4,990	90
New Hampshire.....	200,490	11,950	17,820	6,900	17,630	39,740	38,090	29,950	20,330	11,380	6,490	210
New Jersey.....	1,352,210	76,230	96,840	45,560	100,810	263,030	260,450	224,530	154,760	87,280	41,600	1,120
New Mexico.....	280,660	24,880	25,700	11,160	27,140	56,050	49,570	39,580	25,130	14,380	6,930	140
New York.....	3,005,760	185,900	258,290	120,780	248,190	570,260	545,590	465,700	320,300	187,830	99,290	3,630
North Carolina.....	1,349,740	94,610	136,520	71,330	128,730	267,670	234,830	190,730	123,890	67,480	33,110	840
North Dakota.....	114,100	5,050	7,300	3,210	9,580	21,540	21,180	18,670	13,420	8,830	5,150	170
Ohio.....	1,918,410	106,510	158,740	70,110	169,850	367,500	360,520	309,970	205,980	114,680	52,870	1,680
Oklahoma.....	594,020	39,040	49,130	26,500	55,890	119,620	104,270	88,460	58,140	34,660	17,790	520
Oregon.....	568,250	29,380	43,380	20,410	53,230	107,730	102,750	91,940	64,070	36,680	18,300	380
Pennsylvania.....	2,357,380	113,800	169,440	81,000	199,670	443,680	455,160	396,870	273,120	151,380	71,490	1,770
Rhode Island.....	191,680	10,750	17,240	7,880	13,610	32,680	34,270	32,400	23,100	12,860	6,650	240
South Carolina.....	689,020	55,830	75,340	39,260	66,570	133,780	116,750	95,100	60,000	30,860	15,080	450
South Dakota.....	136,050	8,370	9,600	4,010	11,170	25,180	24,400	21,450	15,950	9,990	5,690	240
Tennessee.....	995,810	74,860	108,000	53,990	95,540	194,790	166,910	136,450	87,550	52,240	24,660	820
Texas.....	2,638,130	202,590	213,460	96,900	245,120	549,110	478,350	389,280	247,920	140,720	72,870	1,810
Utah.....	242,280	19,620	18,390	7,290	21,020	50,350	43,610	36,110	25,460	13,970	6,370	90
Vermont.....	104,680	6,910	10,330	4,180	9,540	20,090	18,560	15,190	10,440	6,230	3,110	100
Virginia.....	1,035,090	71,020	96,470	47,560	95,290	206,990	184,090	152,010	99,520	54,440	26,860	840
Washington.....	845,210	46,630	69,680	29,920	77,190	166,730	149,840	132,780	93,730	51,390	26,540	780
West Virginia.....	390,430	25,250	46,810	24,860	38,520	68,730	65,790	55,560	35,060	19,980	9,550	320
Wisconsin.....	899,520	44,450	66,730	28,000	82,660	174,340	167,420	140,940	102,590	59,690	31,740	960
Wyoming.....	77,240	5,020	6,130	2,740	7,740	16,090	14,250	11,070	7,880	4,090	2,160	70
Outlying areas:												
American Samoa.....	5,410	1,890	800	560	510	680	520	170	160	90	30	...
Guam.....	10,710	2,300	920	230	1,140	2,530	1,890	1,140	390	130	40	...
Northern Mariana Islands.....	1,740	500	230	90	160	400	210	70	60	20	...	...
Puerto Rico.....	665,490	80,120	97,350	50,990	69,870	114,390	89,420	72,980	48,400	28,260	13,280	430
Virgin Islands.....	13,430	1,430	980	590	1,770	3,110	2,330	1,560	910	420	310	20
Foreign countries.....	393,070	20,200	12,710	7,440	29,220	82,930	85,640	71,320	42,670	26,040	14,400	500

<sup>1</sup> Includes beneficiaries with unknown state code.

CONTACT: Rona Blumenthal/Salvatore Gallicchio (410) 965-0163/0158 for further information.

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

Table 5.J5.1.—Number, by race<sup>1</sup> and sex, December 2000

[Based on 10-percent sample]

State	Race			Adult beneficiaries		
	Total <sup>2</sup>	White	Black	Other	Men	Women
Total <sup>3</sup> .....	45,417,470	38,853,370	4,622,040	1,768,950	17,716,940	23,890,040
Alabama .....	826,710	626,340	188,040	10,610	309,140	427,840
Alaska .....	54,950	42,190	1,750	10,780	22,690	23,900
Arizona .....	791,330	725,600	20,310	43,100	325,050	405,690
Arkansas .....	517,230	444,600	64,520	7,030	199,140	267,610
California .....	4,208,290	3,453,230	294,530	440,080	1,692,040	2,181,970
Colorado .....	535,270	495,650	18,190	19,090	214,540	277,820
Connecticut .....	578,650	525,710	36,210	13,620	224,200	314,080
Delaware .....	134,900	112,200	19,930	2,390	52,830	71,510
District of Columbia .....	74,030	18,420	52,800	2,280	27,510	39,990
Florida .....	3,193,390	2,801,500	295,270	83,240	1,306,560	1,669,070
Georgia .....	1,106,410	818,680	265,470	19,400	408,860	579,260
Hawaii .....	184,140	48,330	2,200	132,560	76,020	94,710
Idaho .....	194,030	188,210	380	4,620	79,990	99,110
Illinois .....	1,842,350	1,551,040	234,690	50,150	703,010	990,130
Indiana .....	994,060	905,930	73,300	11,950	378,420	532,830
Iowa .....	540,360	525,720	8,350	4,660	212,620	293,480
Kansas .....	440,010	409,000	21,460	8,120	168,950	238,220
Kentucky .....	739,010	682,200	44,720	10,020	287,400	374,170
Louisiana .....	710,870	499,520	196,040	12,970	269,120	353,800
Maine .....	251,480	244,720	760	4,860	100,580	129,410
Maryland .....	723,250	543,770	157,590	19,550	275,460	387,110
Massachusetts .....	1,063,950	985,370	40,680	31,720	406,720	576,400
Michigan .....	1,644,640	1,410,300	201,010	28,310	637,490	863,710
Minnesota .....	738,750	711,170	12,300	12,230	291,340	398,110
Mississippi .....	516,260	350,350	156,790	7,860	187,130	259,130
Missouri .....	1,004,500	900,830	90,030	10,840	386,650	530,040
Montana .....	157,720	151,330	350	5,460	65,240	79,740
Nebraska .....	284,370	270,060	8,880	4,630	109,970	155,200
Nevada .....	287,200	253,690	17,790	14,800	125,140	141,050
New Hampshire .....	200,490	195,530	930	3,090	79,670	105,420
New Jersey .....	1,352,210	1,151,460	148,810	46,150	512,870	742,080
New Mexico .....	280,660	247,690	5,150	26,710	113,830	137,140
New York .....	3,005,760	2,475,360	359,420	153,080	1,146,970	1,612,900
North Carolina .....	1,349,740	1,058,370	263,610	24,590	511,760	718,140
North Dakota .....	114,100	110,330	270	2,850	45,360	61,440
Ohio .....	1,918,410	1,706,030	182,110	23,130	746,090	1,026,110
Oklahoma .....	594,020	537,490	33,460	21,330	231,140	313,120
Oregon .....	568,250	545,030	7,410	13,910	232,110	298,730
Pennsylvania .....	2,357,380	2,139,070	176,710	34,950	905,320	1,295,560
Rhode Island .....	191,680	179,430	5,950	5,120	73,230	104,280
South Carolina .....	689,020	502,520	176,350	8,080	258,800	359,430
South Dakota .....	136,050	129,450	450	5,740	53,300	71,870
Tennessee .....	995,810	857,550	123,890	11,980	375,500	524,220
Texas .....	2,638,130	2,233,880	284,690	111,430	1,028,930	1,358,690
Utah .....	242,280	231,990	1,580	7,850	96,420	122,400
Vermont .....	104,680	102,200	420	1,340	41,360	54,290
Virginia .....	1,035,090	819,880	189,270	22,660	396,820	547,960
Washington .....	845,210	784,930	20,610	36,600	344,050	441,740
West Virginia .....	390,430	372,460	10,820	6,200	156,290	197,470
Wisconsin .....	899,520	853,230	32,320	10,680	358,320	479,440
Wyoming .....	77,240	74,670	370	1,860	32,770	38,400
Outlying areas:						
American Samoa .....	5,410	430	30	4,950	1,510	1,970
Guam .....	10,710	1,230	310	9,020	4,040	4,260
Northern Mariana Islands .....	1,740	220	30	1,480	560	600
Puerto Rico .....	665,490	514,470	50,040	96,760	258,340	303,190
Virgin Islands .....	13,430	2,630	9,790	910	5,250	6,390
Foreign countries .....	393,070	327,510	12,540	49,260	160,800	206,740

<sup>1</sup> For a description of the race data, see footnotes 1 and 3 in table 5.A1.

<sup>2</sup> Includes persons of unknown race.

<sup>3</sup> Includes beneficiaries with unknown state code.

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

Table 5.J6.—Average and median monthly benefit for **retired workers** and number and percentage distribution, by monthly benefit, December 2000

[Based on 10-percent sample]

State	Monthly benefit		Number	Percentage distribution of beneficiaries receiving—										
	Average	Median		Total	Less than \$400.00	\$400.00-\$499.99	\$500.00-\$599.99	\$600.00-\$699.99	\$700.00-\$799.99	\$800.00-\$899.99	\$900.00-\$999.99	\$1,000.00-\$1,099.99	\$1,100.00-\$1,199.99	\$1,200.00 or more
Total <sup>1</sup>	\$844.60	\$851.00	28,505,990	100.0	8.3	8.9	10.3	8.7	8.8	10.2	11.5	11.3	7.8	14.2
Alabama	796.80	784.00	457,990	100.0	9.6	10.1	11.5	10.4	10.0	10.9	10.7	9.6	6.6	10.7
Alaska	825.10	806.00	31,320	100.0	10.0	10.4	10.8	9.3	8.5	9.4	9.6	9.4	7.3	15.4
Arizona	856.70	877.00	517,120	100.0	7.0	8.2	10.0	8.1	8.6	10.9	12.8	12.3	8.4	13.8
Arkansas	776.70	756.00	296,920	100.0	8.9	10.7	12.6	11.5	11.0	11.4	10.4	9.2	5.6	8.7
California	853.50	854.00	2,708,560	100.0	9.9	8.8	9.8	8.4	8.2	9.2	10.4	10.6	7.7	16.9
Colorado	821.90	830.00	334,580	100.0	10.8	9.1	10.2	8.5	8.5	9.6	11.0	11.0	7.8	13.4
Connecticut	926.40	937.00	404,160	100.0	4.7	6.5	8.8	7.8	7.8	9.9	11.9	12.7	9.4	20.3
Delaware	880.20	907.00	87,530	100.0	4.9	8.5	9.8	8.0	7.9	9.9	13.4	14.1	8.8	14.8
District of Columbia	713.60	638.00	48,070	100.0	23.2	11.0	11.8	9.8	8.8	7.1	6.6	5.0	4.2	12.5
Florida	840.40	843.00	2,163,900	100.0	7.5	9.4	10.6	8.8	9.2	10.8	11.7	11.3	7.4	13.3
Georgia	812.10	792.00	647,960	100.0	8.8	9.5	11.4	10.9	10.1	10.1	10.1	10.1	6.8	12.2
Hawaii	834.00	835.00	131,010	100.0	9.5	8.8	9.9	8.8	9.3	10.8	11.8	10.3	7.2	13.6
Idaho	822.30	832.00	124,620	100.0	7.5	10.5	9.9	8.9	9.5	11.7	12.3	11.4	7.6	10.8
Illinois	884.90	905.00	1,196,410	100.0	7.1	7.8	9.5	7.7	7.6	9.7	11.8	12.3	9.0	17.4
Indiana	883.40	906.00	629,500	100.0	4.6	7.7	9.7	7.6	8.3	11.2	13.9	13.6	9.2	14.2
Iowa	843.40	856.00	351,570	100.0	6.2	9.2	10.4	8.5	9.4	11.6	13.2	11.8	7.9	11.8
Kansas	865.00	872.00	284,660	100.0	5.9	8.7	9.9	8.6	9.3	10.7	12.0	12.1	8.1	14.7
Kentucky	791.50	783.00	382,810	100.0	10.0	10.4	11.3	10.0	10.0	10.5	11.1	10.3	6.6	9.9
Louisiana	783.40	768.00	362,400	100.0	13.0	10.8	11.0	9.3	8.6	9.3	10.2	9.6	6.7	11.5
Maine	776.20	766.00	153,520	100.0	10.8	10.2	11.3	10.5	10.9	11.1	10.8	9.6	5.8	8.9
Maryland	849.60	856.00	473,310	100.0	10.1	8.3	9.6	8.3	8.6	9.4	10.7	11.3	7.8	15.9
Massachusetts	849.20	849.00	697,230	100.0	9.2	8.8	10.4	8.8	8.5	9.4	10.5	10.6	7.6	16.1
Michigan	908.80	929.00	1,017,370	100.0	4.0	7.3	9.0	6.6	7.7	11.4	13.7	14.5	9.6	16.3
Minnesota	835.30	848.00	490,040	100.0	8.0	9.4	11.0	8.9	8.2	9.7	11.8	12.1	8.1	12.8
Mississippi	762.30	731.00	271,660	100.0	11.0	11.4	12.8	11.1	10.9	10.2	9.7	8.3	5.4	9.1
Missouri	831.60	837.00	620,490	100.0	7.8	9.2	10.7	9.3	9.2	10.6	11.9	11.6	7.5	12.2
Montana	818.50	828.00	98,240	100.0	8.1	9.9	10.3	9.0	9.5	11.5	12.2	11.6	7.5	10.4
Nebraska	828.40	823.00	186,000	100.0	7.3	9.6	10.7	9.6	10.2	10.8	11.7	10.7	7.2	12.2
Nevada	851.10	858.00	194,640	100.0	8.1	8.1	10.2	9.0	8.8	10.3	10.9	11.8	8.5	14.3
New Hampshire	859.80	863.00	134,160	100.0	6.5	7.8	10.3	9.3	9.6	11.0	11.8	11.3	8.3	14.3
New Jersey	932.60	947.00	927,730	100.0	4.9	6.8	9.1	7.6	7.5	9.1	11.0	12.2	9.7	22.0
New Mexico	788.40	775.00	165,580	100.0	11.7	10.0	10.9	9.8	10.0	10.2	10.4	9.6	6.4	11.0
New York	897.10	903.00	1,961,250	100.0	6.2	7.7	9.3	7.9	8.3	10.2	11.7	12.0	8.5	18.0
North Carolina	813.70	799.00	836,050	100.0	7.1	8.9	11.3	11.2	11.4	11.7	11.2	10.0	6.5	10.6
North Dakota	788.30	770.00	69,730	100.0	9.9	10.9	11.5	10.9	10.0	10.0	10.2	9.7	6.6	10.4
Ohio	861.60	897.00	1,172,680	100.0	8.3	8.1	9.2	7.2	7.4	10.2	13.3	13.2	9.0	14.3
Oklahoma	805.30	801.00	364,720	100.0	9.3	9.8	10.8	10.0	9.8	10.9	11.5	10.4	6.7	10.7
Oregon	854.70	878.00	378,090	100.0	6.3	8.6	9.9	8.1	8.6	11.3	13.7	12.8	8.3	12.4
Pennsylvania	868.40	890.00	1,545,630	100.0	5.7	8.4	9.8	7.8	8.4	11.2	13.7	12.9	8.3	13.7
Rhode Island	844.90	840.00	130,530	100.0	7.0	8.7	10.5	9.2	9.9	11.9	11.6	10.4	7.5	13.4
South Carolina	812.20	799.00	411,030	100.0	7.6	9.1	11.3	10.9	11.0	11.4	11.0	10.0	6.7	10.9
South Dakota	774.20	760.00	85,470	100.0	10.0	11.7	11.6	10.1	10.9	11.1	10.3	9.4	6.1	8.7
Tennessee	811.10	795.00	577,560	100.0	8.2	9.8	11.5	10.6	10.3	10.7	10.9	10.0	6.5	11.5
Texas	821.00	810.00	1,577,730	100.0	10.6	9.6	10.8	9.2	8.8	9.3	10.2	10.2	7.0	14.2
Utah	848.00	876.00	156,820	100.0	9.5	9.1	10.0	7.9	7.2	8.5	11.5	12.2	8.6	15.5
Vermont	831.40	829.00	65,820	100.0	6.6	9.0	10.8	9.5	10.3	12.2	11.8	11.4	7.0	11.5
Virginia	820.80	810.00	637,040	100.0	9.5	9.0	11.0	9.8	9.5	10.2	10.6	10.2	7.0	13.1
Washington	879.10	903.00	554,450	100.0	6.1	7.9	9.6	7.8	8.0	10.2	12.7	13.0	9.2	15.5
West Virginia	833.10	854.00	199,320	100.0	6.8	9.2	9.3	8.7	9.4	12.4	14.1	12.6	7.6	10.0
Wisconsin	864.10	893.00	603,380	100.0	5.1	8.8	10.1	7.8	8.1	10.9	14.0	14.0	8.9	12.3
Wyoming	841.00	847.00	50,570	100.0	7.3	9.3	10.9	8.5	9.2	10.1	11.1	12.2	8.1	13.2
Outlying areas:														
American Samoa	501.50	448.50	1,380	100.0	35.5	26.8	12.3	8.7	3.6	3.6	2.2	3.6	1.4	2.2
Guam	590.50	515.00	5,380	100.0	25.5	21.6	13.6	10.8	9.3	5.9	3.3	3.2	2.2	4.6
Northern Mariana Islands	478.30	424.00	710	100.0	45.1	22.5	9.9	4.2	4.2	4.2	1.4	1.4	2.8	4.2
Puerto Rico	555.40	510.00	293,610	100.0	29.3	18.8	16.1	11.5	8.0	5.6	3.9	2.5	1.6	2.7
Virgin Islands	710.10	643.00	8,310	100.0	13.6	15.8	15.4	11.4	9.6	8.7	7.2	5.3	4.2	8.8
Foreign countries	509.80	471.00	225,890	100.0	38.8	15.3	12.6	8.9	6.5	5.5	4.2	3.2	1.9	3.1

<sup>1</sup> Includes beneficiaries with unknown state code.

CONTACT: Rona Blumenthal/Salvatore Gallicchio (410) 965-0163/0158 for further information.

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

Table 5.J8.—Average and median monthly benefit for **disabled workers** and number and percentage distribution, by monthly benefit, December 2000

[Based on 10-percent sample]

State	Monthly benefit		Number	Percentage distribution of beneficiaries receiving—										
	Average	Median		Total	Less than \$400.00	\$400.00-\$499.90	\$500.00-\$599.90	\$600.00-\$699.90	\$700.00-\$799.90	\$800.00-\$899.90	\$900.00-\$999.90	\$1,000.00-\$1,099.90	\$1,100.00-\$1,199.90	\$1,200.00 or more
Total <sup>1</sup> .....	\$787.00	\$736.00	5,035,840	100.0	8.7	9.9	14.0	13.1	11.2	9.4	7.9	6.4	5.4	14.0
Alabama.....	755.70	703.00	121,120	100.0	8.8	10.6	15.8	14.4	12.0	9.7	7.3	5.9	4.6	10.9
Alaska.....	777.10	712.00	7,460	100.0	10.2	11.0	14.5	12.9	10.5	9.0	7.5	4.7	4.6	15.3
Arizona.....	816.70	767.00	84,500	100.0	6.8	9.6	13.4	13.0	10.6	9.4	8.1	6.6	6.2	16.4
Arkansas.....	738.00	697.00	75,390	100.0	9.2	11.2	15.3	14.7	13.2	10.0	7.9	6.0	4.3	8.3
California.....	799.00	751.00	437,270	100.0	9.5	9.8	13.1	12.1	10.4	9.3	7.8	6.5	5.7	15.9
Colorado.....	778.60	728.00	61,280	100.0	8.4	10.1	14.6	13.7	11.7	8.9	7.8	6.7	5.5	12.7
Connecticut.....	814.00	757.00	53,190	100.0	6.7	9.0	13.7	13.0	11.9	9.5	8.3	6.5	5.5	15.8
Delaware.....	814.10	768.00	14,920	100.0	8.6	8.5	13.5	12.1	10.1	9.6	7.5	7.3	5.8	17.0
District of Columbia..	731.80	693.00	8,470	100.0	8.6	11.3	14.2	16.5	13.6	11.6	7.8	4.7	3.3	8.4
Florida.....	791.60	743.00	305,290	100.0	7.9	10.0	13.9	13.1	11.5	9.7	7.9	6.6	5.4	14.0
Georgia.....	766.80	721.00	157,920	100.0	8.0	9.5	14.7	15.0	12.6	10.0	8.2	6.3	4.9	10.8
Hawaii.....	803.90	760.00	13,510	100.0	7.5	8.4	14.8	12.7	11.3	9.6	8.8	6.3	5.5	15.1
Idaho.....	771.90	724.00	20,020	100.0	10.6	9.9	14.4	12.3	10.2	9.4	8.3	6.3	5.7	12.7
Illinois.....	815.50	770.00	175,060	100.0	7.9	9.3	13.1	12.1	10.8	9.6	7.7	6.7	6.0	16.8
Indiana.....	795.60	743.00	108,210	100.0	8.9	10.3	13.6	12.0	11.1	9.1	7.8	6.2	5.6	15.5
Iowa.....	764.30	719.00	47,800	100.0	10.6	10.7	14.1	12.3	10.6	9.3	7.8	7.3	5.3	11.9
Kansas.....	764.70	712.00	42,390	100.0	10.0	10.6	15.3	12.9	10.9	8.8	7.3	6.8	5.4	11.9
Kentucky.....	782.30	727.00	125,650	100.0	10.3	10.6	13.7	12.4	10.4	8.6	7.1	6.5	5.4	15.0
Louisiana.....	790.10	741.00	88,460	100.0	10.3	10.1	12.9	12.2	10.6	8.4	7.2	6.8	5.7	15.8
Maine.....	716.60	674.00	34,700	100.0	11.4	11.7	15.6	14.8	12.2	10.0	7.3	5.5	3.7	7.8
Maryland.....	820.90	776.00	70,200	100.0	7.0	8.5	12.4	13.3	11.6	10.1	8.5	6.6	5.8	16.2
Massachusetts.....	778.20	723.00	125,430	100.0	7.4	9.8	15.1	14.3	12.4	9.7	7.7	6.4	4.7	12.5
Michigan.....	846.90	809.00	182,760	100.0	8.6	8.5	11.8	10.8	9.4	8.8	7.7	6.9	6.5	21.0
Minnesota.....	770.40	716.00	66,600	100.0	9.3	10.8	14.8	13.1	11.4	9.1	7.2	5.8	5.3	13.1
Mississippi.....	733.30	683.00	85,700	100.0	9.1	11.4	15.5	16.2	12.3	9.7	7.5	5.6	3.9	8.8
Missouri.....	770.30	715.00	123,130	100.0	9.0	10.2	14.9	13.9	11.1	9.4	8.1	5.9	5.0	12.6
Montana.....	776.40	744.00	16,870	100.0	9.2	11.4	13.1	11.9	10.5	10.8	7.3	7.1	6.6	12.1
Nebraska.....	743.60	683.00	25,380	100.0	10.0	12.3	15.0	14.9	10.4	8.1	7.6	6.7	5.0	10.0
Nevada.....	835.00	793.50	31,400	100.0	6.9	8.0	13.1	12.0	10.4	9.0	8.9	7.7	6.3	17.7
New Hampshire.....	788.40	743.00	22,210	100.0	6.2	10.4	13.8	14.4	12.6	10.1	8.4	6.5	5.2	12.6
New Jersey.....	845.30	798.00	127,330	100.0	6.5	8.5	12.9	12.0	10.1	9.6	8.1	7.1	5.6	19.5
New Mexico.....	762.30	716.50	31,620	100.0	9.3	10.5	14.5	13.6	11.4	10.3	7.3	6.5	5.7	11.0
New York.....	832.50	785.00	333,870	100.0	7.8	9.0	12.6	11.9	10.1	9.1	8.1	6.6	6.1	18.6
North Carolina.....	761.40	722.00	193,120	100.0	7.8	9.6	14.7	14.7	13.2	11.0	8.4	6.3	4.8	9.5
North Dakota.....	748.00	705.50	9,080	100.0	11.5	10.8	14.8	12.3	11.8	8.8	8.5	6.7	3.7	11.1
Ohio.....	788.60	740.00	195,430	100.0	10.3	10.4	13.3	11.8	10.1	8.3	7.8	6.7	6.2	15.1
Oklahoma.....	773.10	734.00	65,800	100.0	9.5	10.5	14.1	12.2	11.1	9.8	8.3	6.9	5.6	12.1
Oregon.....	778.70	732.00	57,030	100.0	10.0	10.1	14.1	12.2	10.9	8.7	8.3	6.1	5.9	13.6
Pennsylvania.....	803.10	760.00	213,630	100.0	8.8	9.1	13.0	12.5	10.4	9.2	8.3	7.4	6.3	14.9
Rhode Island.....	764.00	710.00	22,970	100.0	8.6	10.4	15.1	14.5	11.4	9.6	7.6	6.6	5.1	11.1
South Carolina.....	771.50	730.00	102,370	100.0	7.3	8.8	14.9	14.8	13.2	10.6	8.9	6.3	4.8	10.4
South Dakota.....	710.80	663.00	12,020	100.0	14.6	12.0	14.1	14.6	9.8	10.3	6.4	5.7	4.2	8.3
Tennessee.....	756.80	711.50	142,960	100.0	8.9	10.1	14.8	14.7	12.4	10.2	7.9	6.2	4.6	10.2
Texas.....	780.40	736.00	254,380	100.0	8.8	9.7	14.3	12.9	11.4	9.8	8.4	6.4	5.3	12.9
Utah.....	771.20	706.00	21,500	100.0	10.8	11.7	15.3	11.6	9.4	7.3	7.5	6.0	5.1	15.3
Vermont.....	755.70	713.00	12,920	100.0	9.0	10.1	15.3	13.9	12.5	10.1	8.2	6.4	4.3	10.0
Virginia.....	784.10	734.00	127,610	100.0	8.8	9.3	13.8	14.0	11.6	9.6	7.9	6.2	5.3	13.5
Washington.....	791.60	739.00	89,640	100.0	9.6	10.4	13.7	12.1	10.3	9.2	7.2	6.4	5.2	15.8
West Virginia.....	832.50	791.50	60,940	100.0	9.7	8.2	11.2	11.4	10.1	8.9	7.5	7.1	6.0	19.9
Wisconsin.....	781.10	733.00	82,340	100.0	9.7	10.5	14.3	11.5	11.1	8.9	7.6	6.4	6.2	13.7
Wyoming.....	797.70	744.50	7,940	100.0	9.7	10.6	13.1	11.8	9.7	7.7	6.9	6.4	7.7	16.4
Outlying areas:														
American Samoa.....	595.80	585.00	1,250	100.0	28.8	12.8	12.0	12.8	7.2	12.0	6.4	3.2	1.6	3.2
Guam.....	682.70	638.00	660	100.0	15.2	13.6	10.6	16.7	10.6	12.1	4.5	6.1	3.0	7.6
Northern Mariana Islands.....	409.50	284.50	100	100.0	(2)	(2)	(2)	(2)	(2)	(2)	(2)	(2)	(2)	(2)
Puerto Rico.....	666.90	626.00	124,420	100.0	8.9	12.4	22.6	19.9	12.6	8.6	5.7	3.8	2.1	3.4
Virgin Islands.....	725.50	676.00	1,170	100.0	10.3	12.8	17.1	12.8	12.0	11.1	4.3	5.1	4.3	10.3
Foreign countries.....	683.40	658.00	11,250	100.0	19.0	10.8	13.0	12.1	11.3	8.7	7.2	5.1	4.5	8.4

<sup>1</sup> Includes beneficiaries with unknown state code.

<sup>2</sup> Base figure too small to meet statistical standards for reliability of derived figure.



5.J OASDI Current-Pay Benefits: Geographic Data

Table 5.J9.—Average and median monthly benefit for nondisabled widows and widowers and number and percentage distribution, by monthly benefit, December 2000

[Based on 10-percent sample]

State	Monthly benefit		Number	Percentage distribution of beneficiaries receiving—										
	Average	Median		Total	Less than \$400.00	\$400.00-\$499.90	\$500.00-\$599.90	\$600.00-\$699.90	\$700.00-\$799.90	\$800.00-\$899.90	\$900.00-\$999.90	\$1,000.00-\$1,099.90	\$1,100.00-\$1,199.90	\$1,200.00 or more
Total <sup>1</sup> .....	\$810.20	\$811.00	4,698,660	100.0	8.1	6.2	8.2	11.8	13.9	15.9	13.8	8.9	5.2	8.1
Alabama.....	733.40	724.00	94,690	100.0	12.1	9.5	11.1	14.0	13.5	13.7	11.0	6.3	3.7	5.1
Alaska.....	764.90	778.00	4,220	100.0	11.1	9.2	8.3	8.8	16.1	14.0	13.5	9.7	4.7	4.5
Arizona.....	837.60	843.00	69,920	100.0	6.6	4.8	6.8	10.4	13.9	18.0	15.9	9.4	5.6	8.6
Arkansas.....	714.00	699.00	56,620	100.0	12.6	10.2	12.7	14.5	13.3	12.9	10.1	6.0	3.3	4.3
California.....	843.20	838.00	394,960	100.0	7.6	5.6	7.0	10.8	13.2	15.6	14.2	9.6	5.7	10.8
Colorado.....	817.50	820.00	53,140	100.0	8.0	6.3	8.3	11.3	13.0	15.1	14.6	9.1	5.6	8.7
Connecticut.....	898.80	886.00	49,430	100.0	3.7	2.8	5.4	9.5	13.6	17.6	15.9	11.6	8.4	11.6
Delaware.....	868.10	870.00	13,010	100.0	3.5	3.8	6.8	10.1	14.9	17.6	17.0	11.1	5.9	9.3
District of Columbia.....	674.80	629.00	7,510	100.0	22.6	12.0	12.3	11.6	12.3	8.4	7.6	4.0	2.9	6.4
Florida.....	835.20	826.00	288,490	100.0	5.9	5.1	7.7	12.1	14.7	17.0	14.3	8.9	5.3	9.0
Georgia.....	745.20	734.00	110,720	100.0	11.7	9.0	11.4	13.1	13.7	13.6	10.7	6.8	3.7	6.2
Hawaii.....	783.30	782.00	14,730	100.0	9.1	7.3	7.9	12.3	15.8	16.4	12.2	8.0	5.2	5.8
Idaho.....	825.30	822.00	18,400	100.0	4.5	5.4	9.2	11.5	15.6	17.9	15.0	9.1	4.3	7.6
Illinois.....	871.80	867.00	195,660	100.0	5.1	4.2	5.7	9.9	13.9	17.1	15.9	11.1	6.5	10.6
Indiana.....	863.40	862.00	105,130	100.0	3.4	3.7	6.1	10.6	14.9	18.4	17.8	11.0	5.8	8.3
Iowa.....	829.70	821.00	62,420	100.0	3.9	5.2	8.7	12.9	15.8	18.2	13.5	9.1	5.1	7.7
Kansas.....	858.20	842.00	47,270	100.0	4.3	4.7	8.3	11.9	14.3	15.3	14.6	9.6	6.5	10.4
Kentucky.....	727.20	727.00	88,150	100.0	12.6	10.1	11.4	12.6	13.2	14.5	10.6	6.7	3.7	4.7
Louisiana.....	740.60	730.00	98,750	100.0	12.7	8.7	11.0	13.3	13.2	13.4	11.0	7.0	3.7	6.0
Maine.....	765.10	754.00	24,410	100.0	9.1	7.0	9.5	16.1	14.7	14.7	12.4	7.0	4.1	5.5
Maryland.....	819.20	822.00	74,110	100.0	8.3	6.3	7.4	11.0	13.7	15.5	14.1	9.7	5.4	8.6
Massachusetts.....	842.30	839.00	98,710	100.0	7.5	4.9	6.7	11.0	14.1	15.7	14.3	10.0	5.8	10.0
Michigan.....	869.80	865.00	177,670	100.0	3.3	3.2	5.0	10.6	15.0	20.1	17.4	11.1	6.3	8.1
Minnesota.....	816.60	820.00	78,370	100.0	6.4	6.5	8.5	11.8	13.9	15.5	14.9	9.4	5.8	7.5
Mississippi.....	686.50	664.00	53,560	100.0	16.7	12.0	12.5	13.4	12.5	11.1	9.1	4.9	3.2	4.5
Missouri.....	804.50	802.00	102,750	100.0	7.0	6.3	8.8	13.0	14.5	16.2	13.6	8.7	5.1	6.8
Montana.....	802.20	792.50	16,620	100.0	6.0	6.0	9.3	13.1	16.7	16.2	13.2	8.1	4.4	7.0
Nebraska.....	832.90	813.00	30,720	100.0	4.2	5.9	9.7	13.7	14.5	16.0	12.1	9.0	5.4	9.6
Nevada.....	846.80	851.00	22,890	100.0	6.2	5.0	6.7	10.8	13.8	15.9	16.3	9.9	6.1	9.3
New Hampshire.....	857.90	857.00	17,260	100.0	4.9	3.8	6.4	12.2	14.2	16.8	16.0	9.9	6.0	9.8
New Jersey.....	897.20	885.00	128,210	100.0	3.7	3.2	5.2	10.3	13.2	16.9	16.0	12.2	7.4	12.0
New Mexico.....	757.80	757.00	27,800	100.0	11.5	8.1	10.4	12.5	13.3	14.3	11.6	7.5	4.6	6.0
New York.....	861.00	850.00	278,140	100.0	4.8	4.2	6.8	11.4	14.5	17.3	15.0	10.1	5.9	10.1
North Carolina.....	742.50	732.50	123,780	100.0	11.6	9.0	10.6	14.1	14.7	13.2	10.8	6.8	3.5	5.7
North Dakota.....	774.80	747.00	16,420	100.0	6.3	8.9	10.8	15.6	14.7	14.7	10.7	6.9	4.6	6.8
Ohio.....	842.50	851.00	237,690	100.0	6.4	4.6	6.1	10.5	13.4	18.2	16.2	10.4	6.0	8.2
Oklahoma.....	783.50	782.00	67,350	100.0	8.3	7.2	9.9	12.8	14.5	16.0	12.7	7.9	4.1	6.7
Oregon.....	849.60	851.00	53,540	100.0	4.7	3.7	6.7	11.2	14.7	18.8	16.2	10.5	5.2	8.3
Pennsylvania.....	851.40	849.00	272,390	100.0	4.1	3.7	6.5	11.6	15.0	18.8	16.7	10.4	5.6	7.7
Rhode Island.....	845.70	832.00	15,170	100.0	4.5	4.0	8.8	11.7	14.8	18.7	13.6	8.6	5.7	9.5
South Carolina.....	736.40	723.00	63,050	100.0	12.3	9.2	11.3	13.7	13.9	12.8	10.9	6.3	4.1	5.6
South Dakota.....	762.80	739.00	16,000	100.0	6.3	9.1	12.2	15.3	16.4	14.0	10.8	6.8	3.8	5.3
Tennessee.....	754.60	745.00	106,510	100.0	10.8	8.3	10.8	13.7	13.7	14.1	11.4	7.1	4.0	6.0
Texas.....	786.50	777.00	312,510	100.0	9.9	7.8	9.8	12.1	13.2	14.0	12.1	8.1	4.8	8.3
Utah.....	859.80	874.00	19,750	100.0	6.7	4.6	6.1	9.8	12.2	15.1	17.0	11.0	7.0	10.5
Vermont.....	812.80	803.50	9,560	100.0	5.6	7.7	8.7	12.8	14.3	16.6	12.8	8.5	4.0	9.0
Virginia.....	769.70	758.00	107,440	100.0	9.8	8.5	10.5	12.7	14.3	13.9	11.5	7.3	4.3	7.2
Washington.....	864.80	862.00	77,540	100.0	4.7	3.9	6.0	9.9	14.9	17.7	16.5	10.9	6.1	9.6
West Virginia.....	774.00	776.00	54,220	100.0	7.6	6.6	10.3	14.4	14.7	16.7	12.9	8.0	4.3	4.4
Wisconsin.....	851.60	853.00	90,880	100.0	3.7	4.3	6.3	11.3	15.2	18.4	16.8	10.5	5.7	7.7
Wyoming.....	825.80	819.00	6,750	100.0	5.0	5.9	9.0	12.4	15.0	14.7	15.9	8.7	5.5	7.9
Outlying areas:														
American Samoa.....	419.00	358.50	400	100.0	(2)	(2)	(2)	(2)	(2)	(2)	(2)	(2)	(2)	(2)
Guam.....	566.70	503.00	870	100.0	33.3	14.9	14.9	9.2	8.0	8.0	5.7	2.3	3.4	(3)
Northern Mariana Islands.....	367.70	318.00	140	100.0	(2)	(2)	(2)	(2)	(2)	(2)	(2)	(2)	(2)	(2)
Puerto Rico.....	498.00	451.00	69,660	100.0	40.7	17.6	14.1	10.0	6.6	4.4	2.8	1.5	.9	1.4
Virgin Islands.....	636.70	607.00	1,010	100.0	21.8	11.9	13.9	15.8	7.9	8.9	10.9	5.0	1.0	3.0
Foreign countries.....	550.60	523.00	71,150	100.0	30.9	15.5	15.4	11.7	9.1	7.0	4.3	2.2	1.6	2.4

<sup>1</sup> Includes beneficiaries with unknown state code.

<sup>2</sup> Base figure too small to meet statistical standards for reliability of derived figure.

<sup>3</sup> Less than 0.05 percent.

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

Table 5.J10.—Number of **children**, by type of benefit, December 2000

[Based on 10-percent sample]

State	Total	Under age 18 of—				Disabled, aged 18 or older of—				Students, aged 18–19 of—			
		Total	Retired workers	Disabled workers	Deceased workers	Total	Retired workers	Disabled workers	Deceased workers	Total	Retired workers	Disabled workers	Deceased workers
Total <sup>1</sup> .....	3,810,490	2,979,660	254,970	1,381,500	1,343,190	733,610	191,950	58,090	483,570	97,220	11,040	35,000	51,180
Alabama.....	89,730	71,460	5,970	36,780	28,710	15,940	3,720	1,410	10,810	2,330	290	1,080	960
Alaska.....	8,360	7,430	810	2,650	3,970	690	200	20	470	240	10	70	160
Arizona.....	60,590	51,240	4,590	22,800	23,850	7,710	2,220	830	4,660	1,640	190	550	900
Arkansas.....	50,480	40,300	3,200	20,680	16,420	8,830	1,770	990	6,070	1,350	130	660	560
California.....	334,280	269,860	30,080	108,710	131,070	58,420	19,130	4,090	35,200	6,000	960	1,570	3,470
Colorado.....	42,910	35,700	2,060	17,120	16,520	6,000	1,700	480	3,820	1,210	150	330	730
Connecticut.....	40,370	30,440	2,350	14,990	13,100	9,190	2,620	460	6,110	740	100	220	420
Delaware.....	10,560	8,510	700	3,960	3,850	1,810	640	150	1,020	240	50	50	140
District of Columbia.....	6,530	5,030	540	1,050	3,440	1,410	230	50	1,130	90	..	10	80
Florida.....	217,760	180,480	20,010	79,980	80,490	31,630	8,680	2,700	20,250	5,650	730	1,830	3,090
Georgia.....	118,290	94,680	5,950	43,080	45,650	19,930	4,070	1,940	13,920	3,680	350	1,360	1,970
Hawaii.....	13,410	10,980	1,600	4,070	5,310	2,250	750	70	1,430	180	50	10	120
Idaho.....	14,930	12,200	870	5,340	5,990	2,390	670	140	1,580	340	30	90	220
Illinois.....	149,210	113,990	9,490	48,370	56,130	31,360	7,410	2,220	21,730	3,860	470	1,370	2,020
Indiana.....	82,810	63,200	4,560	30,850	27,790	17,070	4,120	1,470	11,480	2,540	210	880	1,450
Iowa.....	34,260	24,570	1,510	12,170	10,890	8,580	2,490	580	5,510	1,110	100	510	500
Kansas.....	32,840	25,570	1,560	12,410	11,600	6,150	1,700	370	4,080	1,120	150	440	530
Kentucky.....	77,440	59,660	3,510	36,170	19,980	15,490	3,440	1,910	10,140	2,290	110	1,170	1,010
Louisiana.....	87,950	68,760	5,590	31,600	31,570	16,860	3,840	1,720	11,300	2,330	210	870	1,250
Maine.....	21,490	16,520	980	10,620	4,920	4,420	1,140	310	2,970	550	50	290	210
Maryland.....	60,680	48,680	3,870	17,220	27,590	11,000	2,820	490	7,690	1,000	130	290	580
Massachusetts.....	80,830	61,420	4,310	34,720	22,390	18,160	5,200	1,360	11,600	1,250	130	640	480
Michigan.....	143,440	107,670	7,840	53,160	46,670	32,030	8,410	2,590	21,030	3,740	270	1,440	2,030
Minnesota.....	49,300	35,990	2,340	17,000	16,650	11,770	3,520	540	7,710	1,540	170	520	850
Mississippi.....	70,000	56,630	4,980	29,200	22,450	11,340	2,140	1,420	7,780	2,030	190	1,020	820
Missouri.....	87,810	69,250	4,790	34,590	29,870	15,550	3,800	1,410	10,340	3,010	310	1,100	1,600
Montana.....	12,740	10,310	970	4,660	4,680	1,950	510	220	1,220	480	50	150	280
Nebraska.....	19,200	14,630	850	6,970	6,810	3,920	1,280	210	2,430	650	100	260	290
Nevada.....	21,010	18,580	2,170	7,580	8,830	1,900	540	150	1,210	530	70	180	280
New Hampshire.....	15,400	11,950	810	6,490	4,650	2,990	710	170	2,110	460	50	200	210
New Jersey.....	97,260	76,280	6,720	32,950	36,610	19,040	5,400	1,070	12,570	1,940	260	480	1,200
New Mexico.....	29,690	24,870	2,370	9,730	12,770	3,980	1,110	340	2,530	840	80	290	470
New York.....	245,890	185,980	18,370	92,740	74,870	55,630	14,940	3,580	37,110	4,280	490	1,570	2,220
North Carolina.....	119,840	94,630	5,240	49,340	40,050	22,420	4,910	2,260	15,250	2,790	190	1,240	1,360
North Dakota.....	7,300	5,060	370	2,340	2,350	1,930	450	100	1,380	310	40	80	190
Ohio.....	146,210	106,480	7,890	51,540	47,050	35,300	8,990	2,630	23,680	4,430	420	1,590	2,420
Oklahoma.....	49,760	39,050	2,750	16,540	19,760	8,860	2,110	700	6,050	1,850	110	740	1,000
Oregon.....	37,410	29,360	2,750	12,050	14,560	6,970	2,110	660	4,200	1,080	130	390	560
Pennsylvania.....	156,500	113,760	8,430	53,140	52,190	38,730	9,700	2,910	26,120	4,010	380	1,360	2,270
Rhode Island.....	14,170	10,750	780	6,020	3,950	3,250	750	290	2,210	170	30	60	80
South Carolina.....	70,790	55,840	3,060	27,540	25,240	13,240	2,770	1,200	9,270	1,710	140	550	1,020
South Dakota.....	10,880	8,380	530	3,580	4,270	2,170	470	140	1,560	330	60	130	140
Tennessee.....	96,090	74,890	4,960	37,800	32,130	18,530	3,920	1,670	12,940	2,670	230	1,130	1,310
Texas.....	250,510	202,590	20,200	74,820	107,570	38,980	11,040	2,750	25,190	8,940	1,190	2,530	5,220
Utah.....	23,460	19,610	1,540	7,650	10,420	3,200	1,140	170	1,890	650	130	200	320
Vermont.....	9,030	6,920	520	4,030	2,370	1,870	470	240	1,160	240	50	90	100
Virginia.....	90,310	71,020	4,690	35,010	31,320	17,410	4,010	1,430	11,970	1,880	300	770	810
Washington.....	59,420	46,640	3,830	20,510	22,300	11,030	3,200	830	7,000	1,750	220	690	840
West Virginia.....	36,670	25,290	1,920	14,880	8,490	10,350	2,040	1,150	7,160	1,030	90	480	460
Wisconsin.....	61,760	44,460	2,940	21,320	20,200	15,380	4,370	1,050	9,960	1,920	260	630	1,030
Wyoming.....	6,070	5,020	310	2,370	2,340	850	250	100	500	200	30	50	120
Outlying areas:													
American Samoa.....	1,930	1,890	340	730	820	20	..	..	20	20	..	10	10
Guam.....	2,410	2,300	550	420	1,330	100	30	10	60	10	..	..	10
Northern Mariana Islands.....	580	500	230	30	240	50	10	..	40	30	10	10	10
Puerto Rico.....	103,960	80,130	8,470	45,580	26,080	22,310	6,730	2,280	13,300	1,520	280	730	510
Virgin Islands.....	1,790	1,430	300	330	800	300	130	10	160	60	10	20	30
Foreign countries.....	25,530	20,230	5,910	3,340	10,980	4,930	1,400	50	3,480	370	90	20	260

<sup>1</sup> Includes beneficiaries with unknown state code.

**CONTACT: Rona Blumenthal/Salvatore Gallicchio (410) 965-0163/0158 for further information.**

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

Table 5.J11.—Number and total monthly benefit for beneficiaries in foreign countries, December 2000

Country <sup>1</sup>	Number						Monthly benefit (in thousands)	
	Total	Retired workers <sup>2</sup>	Disabled workers	Widows and widowers <sup>3</sup>	Wives and husbands	Children	All beneficiaries	Retired workers <sup>2</sup>
Total .....	396,482	228,215	11,539	75,832	55,911	24,985	\$187,156	\$115,952
Canada .....	90,657	52,011	2,395	17,021	16,694	2,536	37,206	22,972
Mexico .....	49,814	23,969	1,446	11,966	6,019	6,414	22,449	11,978
Central America and Caribbean.....	19,670	13,098	1,022	1,995	1,337	2,218	11,466	8,181
Barbados .....	1,005	797	27	95	66	20	668	542
Costa Rica .....	2,672	1,719	172	276	182	323	1,710	1,180
Dominican Republic .....	5,398	3,268	431	423	343	933	2,786	1,831
El Salvador .....	778	505	44	86	58	85	401	275
Guatemala .....	1,070	679	50	123	69	149	586	394
Honduras .....	972	565	65	100	58	184	608	392
Jamaica .....	2,717	2,111	65	236	195	110	1,639	1,329
Panama .....	821	487	41	137	65	91	484	309
Trinidad and Tobago .....	815	631	18	76	57	33	526	423
South America .....	12,461	8,117	481	1,797	1,157	909	7,080	4,862
Argentina .....	2,785	1,743	55	490	381	116	1,536	1,033
Brazil .....	1,656	968	32	349	183	124	991	613
Chile .....	1,047	670	36	176	83	82	669	455
Colombia .....	2,538	1,714	157	278	152	237	1,404	982
Ecuador .....	2,128	1,526	103	183	144	172	1,170	871
Peru .....	699	435	32	111	63	58	406	267
Uruguay .....	601	434	28	57	66	16	315	239
Africa .....	1,412	774	85	203	97	253	828	514
Asia .....	38,929	18,175	1,174	9,523	4,607	5,450	20,904	11,570
Cyprus .....	558	314	20	111	61	52	288	183
Hong Kong .....	804	338	7	369	62	28	428	203
India .....	603	368	38	61	58	78	351	222
Israel .....	8,181	4,571	199	1,339	1,154	918	4,788	3,119
Japan .....	5,648	2,643	35	1,678	1,063	229	3,496	1,913
Thailand .....	766	563	49	36	22	96	563	433
Philippines .....	17,988	7,515	540	5,386	1,838	2,709	8,806	4,308
Turkey .....	607	360	25	118	63	41	373	233
Yemen .....	1,589	377	116	127	91	878	607	238
Europe .....	178,237	108,777	4,831	32,485	25,342	6,802	84,046	53,701
Austria .....	2,087	1,364	57	383	237	46	1,044	702
Belgium .....	1,507	938	9	253	254	53	735	489
Croatia .....	1,414	742	152	327	101	92	890	480
Denmark .....	859	498	14	200	99	48	538	324
Finland .....	716	458	21	135	73	29	398	257
France .....	9,109	5,953	88	1,331	1,452	285	4,427	3,118
Germany .....	26,233	16,231	669	4,518	3,531	1,284	11,282	6,953
Greece .....	21,334	11,969	738	4,499	3,299	829	9,865	5,946
Hungary .....	1,591	1,186	93	185	80	47	1,168	905
Ireland .....	7,405	5,033	197	1,018	797	360	4,087	2,978
Italy .....	34,687	19,949	907	7,996	4,728	1,107	16,204	9,810
Malta .....	590	311	27	131	72	49	350	206
Netherlands .....	3,693	2,302	56	549	644	142	1,584	1,029
Norway .....	5,820	3,406	107	1,153	999	155	2,290	1,386
Poland .....	3,412	2,141	181	676	265	149	1,879	1,164
Portugal .....	11,601	7,630	642	1,558	1,326	445	5,332	3,642
Serbia .....	962	503	56	278	88	37	588	292
Spain .....	8,637	5,005	218	1,763	1,360	291	4,268	2,661
Sweden .....	2,742	1,820	38	425	364	95	1,220	805
Switzerland .....	5,228	3,582	32	577	915	122	2,011	1,427
United Kingdom .....	25,971	16,081	421	4,048	4,392	1,029	12,243	8,023
Oceania .....	5,302	3,294	105	842	658	403	3,177	2,174
Australia .....	4,285	2,674	67	735	579	230	2,570	1,751
New Zealand .....	652	450	19	70	52	61	412	306

<sup>1</sup> Countries with 500 or more beneficiaries are shown separately. The total and continent sub-totals include all foreign residents.

<sup>2</sup> Includes special age-72 beneficiaries.

<sup>3</sup> Includes nondisabled widows and widowers, disabled widows and widowers, widowed mothers and fathers, and parents.

CONTACT: Rona Blumenthal/Salvatore Gallicchio (410) 965-0163/0158 for further information.

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

Table 5.J12.—Number of disabled workers, by diagnostic group, December 2000

State	Total number	Diagnosis available	Diagnostic group										Injuries	Other
			Infectious and parasitic diseases <sup>1</sup>	Neoplasms	Endocrine, nutritional, and metabolic	Mental disorders (other than retardation)	Mental retardation	Diseases of the—						
								Nervous system and sense organs	Circulatory system	Respiratory system	Musculoskeletal system			
Total .....	5,042,333	4,959,682	97,919	136,404	244,456	1,361,157	257,601	479,246	532,998	166,054	1,152,231	231,066	300,550	
Alabama.....	121,253	119,129	1,403	2,844	6,143	27,483	5,905	10,085	14,839	4,534	32,630	6,304	6,959	
Alaska.....	7,233	7,178	90	228	283	2,163	359	827	589	211	1,619	422	387	
Arizona.....	85,763	84,539	1,496	2,245	3,444	26,265	2,574	8,589	7,628	2,778	20,284	4,434	4,802	
Arkansas.....	76,532	75,451	1,030	2,176	3,635	13,218	4,089	7,116	9,856	2,933	22,973	4,115	4,310	
California.....	433,005	426,130	13,618	11,926	18,143	138,087	11,684	42,899	37,219	9,800	99,237	20,640	22,877	
Colorado.....	60,958	60,048	1,245	1,505	2,233	15,153	2,857	7,946	4,044	2,118	16,092	3,382	3,473	
Connecticut.....	53,815	53,003	1,103	1,538	2,356	17,863	2,709	5,286	4,925	1,556	10,155	1,909	3,603	
Delaware.....	14,600	14,429	385	428	805	3,761	836	1,465	1,533	509	3,294	611	802	
District of Columbia.....	8,340	8,238	690	181	430	2,479	485	857	795	191	1,269	237	624	
Florida.....	307,500	302,528	10,235	8,852	15,763	78,900	9,605	25,037	35,873	10,391	66,108	17,203	24,561	
Georgia.....	157,748	154,932	4,001	4,178	8,894	36,821	8,676	12,423	18,589	5,765	35,085	6,657	13,843	
Hawaii.....	13,854	13,622	332	441	623	4,883	547	1,168	1,608	292	2,891	640	797	
Idaho.....	20,737	20,509	199	584	978	5,684	1,073	2,231	1,738	716	5,218	1,164	924	
Illinois.....	175,929	173,259	3,166	5,125	9,776	55,181	10,834	18,090	18,705	5,692	30,380	7,006	9,304	
Indiana.....	109,696	107,709	1,463	3,197	7,277	26,267	8,755	11,677	12,575	4,669	21,294	4,338	6,197	
Iowa.....	46,465	45,528	412	1,342	2,277	12,514	4,376	5,166	4,007	1,657	9,711	2,049	2,017	
Kansas.....	41,949	41,427	538	1,128	2,667	10,841	3,237	4,556	3,784	1,569	8,457	2,202	2,448	
Kentucky.....	125,832	124,007	1,158	2,672	5,175	32,630	7,873	8,866	13,860	5,725	33,862	5,229	6,957	
Louisiana.....	88,568	86,741	1,524	2,248	4,175	14,918	5,324	7,497	11,775	2,397	25,420	4,611	6,852	
Maine.....	35,023	34,726	269	797	1,392	11,212	1,918	3,088	3,178	1,106	8,845	1,625	1,296	
Maryland.....	69,741	68,411	2,116	2,380	3,524	17,457	3,658	7,675	8,438	2,358	12,926	3,226	4,653	
Massachusetts.....	123,930	122,250	2,754	3,211	4,250	45,831	5,425	11,518	9,868	3,347	26,102	4,759	5,185	
Michigan.....	183,045	180,013	1,933	4,825	9,644	59,511	9,742	17,804	18,722	5,573	37,073	7,263	7,923	
Minnesota.....	67,849	66,523	813	1,909	2,342	24,645	5,325	7,576	4,976	1,567	11,702	3,079	2,589	
Mississippi.....	85,194	83,794	961	2,145	4,663	20,437	5,037	6,820	11,427	2,828	18,300	3,739	7,437	
Missouri.....	122,975	121,042	1,760	3,089	7,318	27,995	8,276	11,814	13,153	5,080	29,148	6,237	7,172	
Montana.....	16,828	16,612	163	435	594	3,926	818	2,049	1,271	665	4,722	1,052	917	
Nebraska.....	25,320	24,964	314	709	1,331	5,919	1,517	3,112	2,544	899	5,875	1,457	1,287	
Nevada.....	31,460	31,055	659	879	1,455	7,996	775	3,148	3,442	1,239	7,934	1,531	1,997	
New Hampshire.....	22,806	22,620	170	593	805	7,814	1,119	2,455	2,019	738	5,043	1,032	832	
New Jersey.....	125,686	123,263	2,992	4,251	5,568	36,718	4,644	13,519	14,430	3,819	24,771	5,275	7,276	
New Mexico.....	31,544	31,046	499	694	1,412	7,092	1,036	3,271	2,414	1,004	9,688	2,026	1,910	
New York.....	338,265	333,116	9,867	9,894	14,837	83,399	13,981	30,490	36,151	10,457	90,317	14,183	19,540	
North Carolina.....	194,528	191,876	3,320	5,271	11,354	39,345	13,428	15,954	25,075	7,400	45,436	7,865	17,428	
North Dakota.....	9,004	8,868	68	246	324	2,270	808	1,097	856	296	2,035	512	356	
Ohio.....	194,624	190,979	1,983	4,659	9,543	65,222	15,852	16,909	18,740	6,249	31,990	6,341	13,491	
Oklahoma.....	64,892	64,022	821	1,782	3,723	14,871	3,332	6,489	7,806	2,642	16,730	3,122	2,704	
Oregon.....	56,269	55,623	884	1,621	2,545	15,392	3,023	7,068	4,778	1,682	12,806	3,221	2,603	
Pennsylvania.....	214,106	210,514	3,383	6,376	11,459	50,290	12,513	22,311	25,087	7,067	50,223	9,995	11,810	
Rhode Island.....	23,431	23,035	320	647	967	7,652	1,397	2,093	2,130	717	5,179	873	1,060	
South Carolina.....	101,967	100,515	1,516	2,645	5,088	25,438	5,374	8,412	13,746	3,922	23,412	4,862	6,100	
South Dakota.....	11,900	11,728	134	311	405	2,842	935	1,530	1,079	444	3,033	521	494	
Tennessee.....	143,191	141,139	1,822	3,580	6,744	38,910	8,396	11,522	17,086	5,905	32,847	5,778	8,549	
Texas.....	257,413	253,778	7,047	7,846	16,080	53,236	9,767	28,035	30,336	7,996	63,014	13,123	17,298	
Utah.....	21,850	21,662	243	504	1,000	6,588	1,347	2,739	1,565	703	4,722	1,023	1,228	
Vermont.....	12,437	12,308	168	312	616	3,752	668	1,169	1,075	411	2,803	576	758	
Virginia.....	127,904	125,847	2,217	3,690	6,475	28,653	8,823	11,468	14,916	4,916	31,357	5,602	7,730	
Washington.....	90,121	89,234	1,629	2,702	3,844	29,242	4,308	9,849	6,964	2,705	18,827	4,247	4,917	
West Virginia.....	60,494	59,353	430	1,271	3,010	11,818	4,881	4,274	7,474	2,958	15,996	3,435	3,806	
Wisconsin.....	82,672	80,971	936	2,268	4,049	25,524	5,737	9,760	6,712	2,179	16,201	3,634	3,971	
Wyoming.....	7,912	7,835	89	181	325	2,000	456	953	674	395	1,927	477	358	
<b>Outlying areas:</b>														
Puerto Rico.....	123,326	118,850	1,373	1,484	2,224	49,635	1,272	10,009	9,081	2,990	31,969	5,378	3,435	
Other <sup>2</sup> .....	14,849	13,703	178	359	469	3,414	215	1,484	1,843	294	3,899	844	703	

<sup>1</sup> AIDS/HIV records are counted in the Infectious and Parasitic Diseases group. Before 1990, these records were included in the Other group.

<sup>2</sup> Includes American Samoa, Guam, Northern Mariana Islands, Virgin Islands, and foreign countries.

CONTACT: Joseph Bondar/Shirley Turpin (410) 965-0162/0181 for further information.

Table 5.J13.—Number and percentage distribution of disabled workers, by diagnostic group, December 2000

State	Total number	Diagnosis available		Diagnostic group										
		Number	Per- cent	Infectious and parasitic diseases <sup>1</sup>	Neo- plasms	Endo- crine, nutritional, and metabolic	Mental disor- ders (other than retarda- tion)	Mental retardation	Diseases of the—				Injuries	Other
									Nervous system and sense organs	Circula- tory system	Respira- tory system	Muscu- loskele- tal system		
Total .....	5,042,333	4,959,682	100.0	2.0	2.8	4.9	27.4	5.2	9.7	10.7	3.3	23.2	4.7	6.1
Alabama.....	121,253	119,129	100.0	1.2	2.4	5.2	23.1	5.0	8.5	12.5	3.8	27.4	5.3	5.8
Alaska.....	7,233	7,178	100.0	1.3	3.2	3.9	30.1	5.0	11.5	8.2	2.9	22.6	5.9	5.4
Arizona.....	85,763	84,539	100.0	1.8	2.7	4.1	31.1	3.0	10.2	9.0	3.3	24.0	5.2	5.7
Arkansas.....	76,532	75,451	100.0	1.4	2.9	4.8	17.5	5.4	9.4	13.1	3.9	30.4	5.5	5.7
California.....	433,005	426,130	100.0	3.2	2.8	4.3	32.4	2.7	10.1	8.7	2.3	23.3	4.8	5.4
Colorado.....	60,958	60,048	100.0	2.1	2.5	3.7	25.2	4.8	13.2	6.7	3.5	26.8	5.6	5.8
Connecticut.....	53,815	53,003	100.0	2.1	2.9	4.4	33.7	5.1	10.0	9.3	2.9	19.2	3.6	6.8
Delaware.....	14,600	14,429	100.0	2.7	3.0	5.6	26.1	5.8	10.2	10.6	3.5	22.8	4.2	5.6
District of Columbia.....	8,340	8,238	100.0	8.4	2.2	5.2	30.1	5.9	10.4	9.7	2.3	15.4	2.9	7.6
Florida.....	307,500	302,528	100.0	3.4	2.9	5.2	26.1	3.2	8.3	11.9	3.4	21.9	5.7	8.1
Georgia.....	157,748	154,932	100.0	2.6	2.7	5.7	23.8	5.6	8.0	12.0	3.7	22.6	4.3	8.9
Hawaii.....	13,854	13,622	100.0	2.4	3.2	4.6	35.8	4.0	8.6	11.8	2.1	16.8	4.7	5.9
Idaho.....	20,737	20,509	100.0	1.0	2.8	4.8	27.7	5.2	10.9	8.5	3.5	25.4	5.7	4.5
Illinois.....	175,929	173,259	100.0	1.8	3.0	5.6	31.8	6.3	10.4	10.8	3.3	17.5	4.0	5.4
Indiana.....	109,696	107,709	100.0	1.4	3.0	6.8	24.4	8.1	10.8	11.7	4.3	19.8	4.0	5.8
Iowa.....	46,465	45,528	100.0	.9	2.9	5.0	27.5	9.6	11.3	8.8	3.6	21.3	4.5	4.4
Kansas.....	41,949	41,427	100.0	1.3	2.7	6.4	26.2	7.8	11.0	9.1	3.8	20.4	5.3	5.9
Kentucky.....	125,832	124,007	100.0	.9	2.2	4.2	26.3	6.3	7.1	11.2	4.6	27.3	4.2	5.6
Louisiana.....	88,568	86,741	100.0	1.8	2.6	4.8	17.2	6.1	8.6	13.6	2.8	29.3	5.3	7.9
Maine.....	35,023	34,726	100.0	.8	2.3	4.0	32.3	5.5	8.9	9.2	3.2	25.5	4.7	3.7
Maryland.....	69,741	68,411	100.0	3.1	3.5	5.2	25.5	5.3	11.2	12.3	3.4	18.9	4.7	6.8
Massachusetts.....	123,930	122,250	100.0	2.3	2.6	3.5	37.5	4.4	9.4	8.1	2.7	21.4	3.9	4.2
Michigan.....	183,045	180,013	100.0	1.1	2.7	5.4	33.1	5.4	9.9	10.4	3.1	20.6	4.0	4.4
Minnesota.....	67,849	66,523	100.0	1.2	2.9	3.5	37.0	8.0	11.4	7.5	2.4	17.6	4.6	3.9
Mississippi.....	85,194	83,794	100.0	1.1	2.6	5.6	24.4	6.0	8.1	13.6	3.4	21.8	4.5	8.9
Missouri.....	122,975	121,042	100.0	1.5	2.6	6.0	23.1	6.8	9.8	10.9	4.2	24.1	5.2	5.9
Montana.....	16,828	16,612	100.0	1.0	2.6	3.6	23.6	4.9	12.3	7.7	4.0	28.4	6.3	5.5
Nebraska.....	25,320	24,964	100.0	1.3	2.8	5.3	23.7	6.1	12.5	10.2	3.6	23.5	5.8	5.2
Nevada.....	31,460	31,055	100.0	2.1	2.8	4.7	25.7	2.5	10.1	11.1	4.0	25.5	4.9	6.4
New Hampshire.....	22,806	22,620	100.0	.8	2.6	3.6	34.5	4.9	10.9	8.9	3.3	22.3	4.6	3.7
New Jersey.....	125,686	123,263	100.0	2.4	3.4	4.5	29.8	3.8	11.0	11.7	3.1	20.1	4.3	5.9
New Mexico.....	31,544	31,046	100.0	1.6	2.2	4.5	22.8	3.3	10.5	7.8	3.2	31.2	6.5	6.2
New York.....	338,265	333,116	100.0	3.0	3.0	4.5	25.0	4.2	9.2	10.9	3.1	27.1	4.3	5.9
North Carolina.....	194,528	191,876	100.0	1.7	2.7	5.9	20.5	7.0	8.3	13.1	3.9	23.7	4.1	9.1
North Dakota.....	9,004	8,868	100.0	.8	2.8	3.7	25.6	9.1	12.4	9.7	3.3	22.9	5.8	4.0
Ohio.....	194,624	190,979	100.0	1.0	2.4	5.0	34.2	8.3	8.9	9.8	3.3	16.8	3.3	7.1
Oklahoma.....	64,892	64,022	100.0	1.3	2.8	5.8	23.2	5.2	10.1	12.2	4.1	26.1	4.9	4.2
Oregon.....	56,269	55,623	100.0	1.6	2.9	4.6	27.7	5.4	12.7	8.6	3.0	23.0	5.8	4.7
Pennsylvania.....	214,106	210,514	100.0	1.6	3.0	5.4	23.9	5.9	10.6	11.9	3.4	23.9	4.7	5.6
Rhode Island.....	23,431	23,035	100.0	1.4	2.8	4.2	33.2	6.1	9.1	9.2	3.1	22.5	3.8	4.6
South Carolina.....	101,967	100,515	100.0	1.5	2.6	5.1	25.3	5.3	8.4	13.7	3.9	23.3	4.8	6.1
South Dakota.....	11,900	11,728	100.0	1.1	2.7	3.5	24.2	8.0	13.0	9.2	3.8	25.9	4.4	4.2
Tennessee.....	143,191	141,139	100.0	1.3	2.5	4.8	27.6	5.9	8.2	12.1	4.2	23.3	4.1	6.1
Texas.....	257,413	253,778	100.0	2.8	3.1	6.3	21.0	3.8	11.0	12.0	3.2	24.8	5.2	6.8
Utah.....	21,850	21,662	100.0	1.1	2.3	4.6	30.4	6.2	12.6	7.2	3.2	21.8	4.7	5.7
Vermont.....	12,437	12,308	100.0	1.4	2.5	5.0	30.5	5.4	9.5	8.7	3.3	22.8	4.7	6.2
Virginia.....	127,904	125,847	100.0	1.8	2.9	5.1	22.8	7.0	9.1	11.9	3.9	24.9	4.5	6.1
Washington.....	90,121	89,234	100.0	1.8	3.0	4.3	32.8	4.8	11.0	7.8	3.0	21.1	4.8	5.5
West Virginia.....	60,494	59,353	100.0	.7	2.1	5.1	19.9	8.2	7.2	12.6	5.0	27.0	5.8	6.4
Wisconsin.....	82,672	80,971	100.0	1.2	2.8	5.0	31.5	7.1	12.1	8.3	2.7	20.0	4.5	4.9
Wyoming.....	7,912	7,835	100.0	1.1	2.3	4.1	25.5	5.8	12.2	8.6	5.0	24.6	6.1	4.6
Outlying areas:														
Puerto Rico.....	123,326	118,850	100.0	1.2	1.2	1.9	41.8	1.1	8.4	7.6	2.5	26.9	4.5	2.9
Other <sup>2</sup> .....	14,849	13,703	100.0	1.3	2.6	3.4	24.9	1.6	10.8	13.4	2.1	28.5	6.2	5.1

<sup>1</sup> AIDS/HIV records are counted in the Infectious and Parasitic Diseases group. Before 1990, these records were included in the Other group.

<sup>2</sup> Includes American Samoa, Guam, Northern Mariana Islands, Virgin Islands, and foreign countries.

CONTACT: Joseph Bondar/Shirley Turpin (410) 965-0162/0181 for further information.

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

Table 5.J14.—Number, average and median monthly benefit, by type of disabled beneficiary, December 2000

[Based on 10-percent sample]

State	Total			Disabled workers			Disabled children, aged 18 or older			Disabled widows and widowers		
	Number	Average benefit	Median benefit	Number	Average benefit	Median benefit	Number	Average benefit	Median benefit	Number	Average benefit	Median benefit
Total <sup>1</sup> .....	5,969,580	\$745.00	\$692.00	5,035,840	\$787.00	\$736.00	733,610	\$518.40	\$508.00	200,130	\$518.90	\$501.00
Alabama .....	142,670	713.10	663.00	121,120	755.70	703.00	15,940	464.30	435.00	5,610	500.80	494.00
Alaska .....	8,330	752.80	694.00	7,460	777.10	712.00	690	531.40	504.00	180	596.30	621.50
Arizona .....	95,220	785.60	733.00	84,500	816.70	767.00	7,710	534.50	534.00	3,010	555.30	543.00
Arkansas .....	87,850	697.80	658.00	75,390	738.00	697.00	8,830	452.50	424.00	3,630	460.10	459.00
California .....	508,380	762.70	710.00	437,270	799.00	751.00	58,420	538.60	534.00	12,690	543.90	512.00
Colorado .....	69,170	751.00	698.00	61,280	778.60	728.00	6,000	540.60	543.50	1,890	522.50	502.00
Connecticut .....	64,040	773.80	716.00	53,190	814.00	757.00	9,190	584.40	596.00	1,660	533.70	492.50
Delaware .....	17,220	776.80	722.50	14,920	814.10	768.00	1,810	544.90	529.00	490	497.50	529.00
District of Columbia .....	10,220	686.00	647.00	8,470	731.80	693.00	1,410	466.80	441.00	340	453.10	464.50
Florida .....	347,180	758.30	707.00	305,290	791.60	743.00	31,630	519.40	507.00	10,260	503.70	479.00
Georgia .....	184,710	725.40	681.00	157,920	766.80	721.00	19,930	484.30	458.00	6,860	470.70	442.50
Hawaii .....	16,170	756.80	707.00	13,510	803.90	760.00	2,250	506.90	502.00	410	575.50	562.00
Idaho .....	23,000	740.70	689.00	20,020	771.90	724.00	2,390	520.30	513.00	590	576.10	590.00
Illinois .....	214,260	769.80	718.00	175,060	815.50	770.00	31,360	570.10	572.50	7,840	547.00	527.50
Indiana .....	129,900	755.70	700.00	108,210	795.60	743.00	17,070	556.30	561.00	4,620	559.10	554.50
Iowa .....	58,030	722.70	670.00	47,800	764.30	719.00	8,580	531.80	525.00	1,650	509.40	506.00
Kansas .....	50,060	729.30	675.00	42,390	764.70	712.00	6,150	538.60	519.00	1,520	513.70	507.00
Kentucky .....	147,810	736.90	678.00	125,650	782.30	727.00	15,490	461.40	430.00	6,670	521.60	506.00
Louisiana .....	110,800	729.20	678.00	88,460	790.10	741.00	16,860	464.20	430.00	5,480	561.40	533.00
Maine .....	40,330	686.60	646.00	34,700	716.60	674.00	4,420	501.10	488.00	1,210	504.00	510.00
Maryland .....	83,660	777.00	728.00	70,200	820.90	776.00	11,000	550.50	534.00	2,460	537.70	517.50
Massachusetts .....	147,560	740.40	690.00	125,430	778.20	723.00	18,160	531.20	529.50	3,970	501.90	481.00
Michigan .....	223,070	798.70	747.00	182,760	846.90	809.00	32,030	580.90	596.00	8,280	578.00	566.00
Minnesota .....	80,290	729.10	673.00	66,600	770.40	716.00	11,770	533.20	534.00	1,920	495.50	461.50
Mississippi .....	101,490	687.20	645.00	85,700	733.30	683.00	11,340	428.40	396.00	4,450	460.20	445.00
Missouri .....	143,730	733.80	680.00	123,130	770.30	715.00	15,550	517.60	501.00	5,050	508.90	482.00
Montana .....	19,430	739.20	696.00	16,870	776.40	744.00	1,950	497.20	500.00	610	486.40	454.00
Nebraska .....	30,120	708.00	648.00	25,380	743.60	683.00	3,920	521.30	502.00	820	500.10	497.50
Nevada .....	34,380	811.20	769.00	31,400	835.00	793.50	1,900	584.30	588.00	1,080	518.20	460.50
New Hampshire .....	25,900	754.40	708.50	22,210	788.40	743.00	2,990	556.80	545.00	700	518.60	531.00
New Jersey .....	150,690	803.50	749.00	127,330	845.30	798.00	19,040	585.00	587.50	4,320	536.40	510.00
New Mexico .....	36,570	722.30	677.00	31,620	762.30	716.50	3,980	453.60	425.00	970	520.80	508.00
New York .....	401,680	785.30	726.00	333,870	832.50	785.00	55,630	559.90	558.00	12,180	522.10	503.50
North Carolina .....	223,270	721.40	685.00	193,120	761.40	722.00	22,420	478.90	457.50	7,730	424.60	406.00
North Dakota .....	11,320	696.00	635.00	9,080	748.00	705.50	1,930	486.80	456.00	310	477.90	487.00
Ohio .....	239,820	745.30	690.00	195,430	788.60	740.00	35,300	549.30	546.00	9,090	575.70	585.00
Oklahoma .....	77,500	731.30	685.00	65,800	773.10	734.00	8,860	497.40	484.50	2,840	492.10	476.00
Oregon .....	66,010	748.40	698.00	57,030	778.70	732.00	6,970	552.60	550.00	2,010	567.20	567.00
Pennsylvania .....	261,640	757.00	705.00	213,630	803.10	760.00	38,730	552.00	554.00	9,280	552.20	554.50
Rhode Island .....	26,870	731.70	678.00	22,970	764.00	710.00	3,250	539.60	547.00	650	551.20	538.00
South Carolina .....	120,020	726.00	686.00	102,370	771.50	730.00	13,240	470.70	450.00	4,410	436.30	425.00
South Dakota .....	14,580	672.60	629.50	12,020	710.80	663.00	2,170	495.90	484.00	390	479.10	488.00
Tennessee .....	168,600	714.60	672.00	142,960	756.80	711.50	18,530	478.40	457.00	7,110	482.10	474.00
Texas .....	305,340	732.30	686.50	254,380	780.40	736.00	38,980	485.40	461.00	11,980	513.70	504.00
Utah .....	25,340	735.30	665.00	21,500	771.20	706.00	3,200	531.80	518.50	640	548.00	527.50
Vermont .....	15,330	715.90	674.00	12,920	755.70	713.00	1,870	495.20	493.00	540	528.40	536.00
Virginia .....	150,320	741.00	690.00	127,610	784.10	734.00	17,410	494.00	472.00	5,300	514.30	493.00
Washington .....	103,500	762.60	706.50	89,640	791.60	739.00	11,030	571.70	580.00	2,830	589.50	610.00
West Virginia .....	74,590	773.40	720.00	60,940	832.50	791.50	10,350	484.90	472.00	3,300	587.80	577.50
Wisconsin .....	100,290	740.30	686.00	82,340	781.10	733.00	15,380	555.10	561.00	2,570	541.40	534.00
Wyoming .....	9,010	765.70	711.00	7,940	797.70	744.50	850	513.20	513.00	220	586.90	590.50
Outlying areas:												
American Samoa .....	1,270	589.60	584.00	1,250	595.80	585.00	20	207.50	207.50	...	...	...
Guam .....	770	633.30	612.00	660	682.70	638.00	100	328.60	328.50	10	419.00	419.00
Northern Mariana Islands .....	150	381.70	281.00	100	409.50	284.50	50	326.20	179.00	...	...	...
Puerto Rico .....	151,330	609.40	588.00	124,420	666.90	626.00	22,310	327.60	318.00	4,600	421.20	390.50
Virgin Islands .....	1,520	663.60	604.50	1,170	725.50	676.00	300	441.50	377.00	50	548.60	546.00
Foreign countries .....	17,020	587.10	558.00	11,250	683.40	658.00	4,930	373.40	347.00	840	549.90	570.50

<sup>1</sup> Includes beneficiaries with unknown state code.

CONTACT: Joseph Bondar/Shirley Turpin (410) 965-0162/0181 for further information.

5.K OASDI Current-Pay Benefits: Direct Deposit

Table 5.K1.—Number and percent of beneficiaries, and average monthly benefit, by state and direct deposit status, December 2000

[Based on 10-percent sample]

State	All beneficiaries		Direct deposit status					
			Using			Not using		
	Number	Average monthly benefit	Number	Percent	Average monthly benefit	Number	Percent	Average monthly benefit
Total .....	45,417,470	\$767.40	35,618,600	78.4	\$799.10	9,798,870	21.6	\$652.40
Alabama.....	826,710	708.90	605,100	73.2	751.30	221,610	26.8	593.20
Alaska.....	54,950	725.00	42,440	77.2	754.30	12,510	22.8	625.30
Arizona.....	791,330	784.50	691,310	87.4	809.30	100,020	12.6	613.00
Arkansas.....	517,230	696.20	384,720	74.4	733.20	132,510	25.6	588.80
California.....	4,208,290	779.20	3,551,210	84.4	798.90	657,080	15.6	673.10
Colorado.....	535,270	752.10	440,190	82.2	773.70	95,080	17.8	652.20
Connecticut.....	578,650	856.30	441,220	76.2	884.00	137,430	23.8	767.50
Delaware.....	134,900	809.90	113,110	83.8	833.80	21,790	16.2	686.10
District of Columbia.....	74,030	667.10	53,570	72.4	693.00	20,460	27.6	599.10
Florida.....	3,193,390	777.70	2,814,940	88.1	798.80	378,450	11.9	620.90
Georgia.....	1,106,410	730.40	821,720	74.3	772.20	284,690	25.7	609.70
Hawaii.....	184,140	772.00	156,270	84.9	788.90	27,870	15.1	677.20
Idaho.....	194,030	752.90	166,080	85.6	771.90	27,950	14.4	640.10
Illinois.....	1,842,350	812.70	1,443,870	78.4	837.70	398,480	21.6	722.10
Indiana.....	994,060	805.60	769,370	77.4	834.00	224,690	22.6	708.20
Iowa.....	540,360	775.00	456,390	84.5	793.10	83,970	15.5	676.70
Kansas.....	440,010	790.10	361,890	82.2	810.80	78,120	17.8	694.10
Kentucky.....	739,010	702.80	518,690	70.2	746.20	220,320	29.8	600.70
Louisiana.....	710,870	689.50	469,000	66.0	741.40	241,870	34.0	588.90
Maine.....	251,480	704.50	192,630	76.6	736.50	58,850	23.4	599.90
Maryland.....	723,250	786.30	565,340	78.2	809.40	157,910	21.8	703.50
Massachusetts.....	1,063,950	783.00	821,850	77.2	808.50	242,100	22.8	696.30
Michigan.....	1,644,640	824.20	1,327,370	80.7	849.00	317,270	19.3	720.10
Minnesota.....	738,750	771.90	604,200	81.8	794.70	134,550	18.2	669.60
Mississippi.....	516,260	668.40	388,820	75.3	708.40	127,440	24.7	546.30
Missouri.....	1,004,500	755.20	784,940	78.1	782.30	219,560	21.9	658.60
Montana.....	157,720	744.50	130,030	82.4	767.30	27,690	17.6	637.20
Nebraska.....	284,370	761.90	236,670	83.2	782.30	47,700	16.8	660.50
Nevada.....	287,200	793.10	241,560	84.1	811.30	45,640	15.9	696.80
New Hampshire.....	200,490	796.60	163,220	81.4	817.00	37,270	18.6	707.20
New Jersey.....	1,352,210	862.70	1,048,530	77.5	886.20	303,680	22.5	781.80
New Mexico.....	280,660	700.50	219,670	78.3	744.30	60,990	21.7	542.70
New York.....	3,005,760	819.60	2,334,220	77.7	847.40	671,540	22.3	722.80
North Carolina.....	1,349,740	739.90	1,000,540	74.1	783.80	349,200	25.9	613.90
North Dakota.....	114,100	719.40	90,860	79.6	744.10	23,240	20.4	622.80
Ohio.....	1,918,410	782.80	1,441,910	75.2	810.30	476,500	24.8	699.40
Oklahoma.....	594,020	736.10	466,730	78.6	765.20	127,290	21.4	629.10
Oregon.....	568,250	789.10	503,090	88.5	803.30	65,160	11.5	679.30
Pennsylvania.....	2,357,380	802.20	1,834,510	77.8	825.40	522,870	22.2	721.10
Rhode Island.....	191,680	782.80	147,620	77.0	811.20	44,060	23.0	687.30
South Carolina.....	689,020	732.50	504,200	73.2	780.30	184,820	26.8	602.40
South Dakota.....	136,050	704.40	111,000	81.6	728.00	25,050	18.4	599.80
Tennessee.....	995,810	727.80	738,270	74.1	767.70	257,540	25.9	613.50
Texas.....	2,638,130	737.60	1,992,340	75.5	778.40	645,790	24.5	611.50
Utah.....	242,280	766.70	204,910	84.6	788.90	37,370	15.4	645.40
Vermont.....	104,680	752.90	84,480	80.7	775.30	20,200	19.3	659.40
Virginia.....	1,035,090	748.20	772,360	74.6	783.10	262,730	25.4	645.60
Washington.....	845,210	806.80	743,120	87.9	824.50	102,090	12.1	677.90
West Virginia.....	390,430	742.80	248,530	63.7	785.50	141,900	36.3	668.00
Wisconsin.....	899,520	798.20	743,570	82.7	818.10	155,950	17.3	703.30
Wyoming.....	77,240	771.40	64,560	83.6	791.30	12,680	16.4	670.20
Outlying areas:								
Puerto Rico.....	665,490	492.00	328,000	49.3	575.00	337,490	50.7	411.30
Other <sup>1</sup> .....	427,710	478.50	237,860	55.6	493.50	189,850	44.4	459.70

<sup>1</sup> Includes American Samoa, Guam, Northern Mariana Islands, Virgin Islands, and foreign countries.

**5.L OASDI: Current-Pay Benefits: With Representative Payee**

Table 5.L1.—Total number of OASDI beneficiaries and number and percentage with representative payee, by type of beneficiary and age, December 2000

[Based on 10-percent sample]

Type of beneficiary and age	All beneficiaries	Beneficiaries with representative payee	
		Number	Percent
Total .....	45,417,470	4,759,210	10.5
Adult beneficiaries <sup>1</sup> .....	42,437,810	1,781,920	4.2
Retired workers.....	28,505,990	425,690	1.5
Under 65.....	2,553,070	4,830	.2
65-74.....	13,920,570	127,080	.9
75-84.....	9,095,970	143,470	1.5
85 or older.....	2,936,380	150,310	5.1
Disabled workers .....	5,035,840	599,880	11.9
Under 35.....	345,740	92,390	26.7
35-44.....	954,210	167,170	17.5
45-54.....	1,595,610	190,090	11.9
55 or older.....	2,140,280	149,430	7.0
Wives and husbands .....	2,962,020	21,120	.7
Under 65.....	507,450	2,590	.5
65-74.....	1,517,490	8,050	.5
75-84.....	820,750	6,800	.8
85 or older.....	116,330	3,000	2.6
Widows and widowers <sup>2</sup> .....	4,902,930	141,160	2.9
Under 65.....	662,570	2,750	.4
65-74.....	1,515,390	22,950	1.5
75-84.....	1,747,100	47,470	2.7
85 or older.....	977,870	67,990	7.0
Disabled widows and widowers.....	200,130	13,510	6.8
Under 55.....	27,540	2,100	7.6
55-64.....	172,590	11,410	6.6
Disabled children, aged 18 or older.....	733,610	577,250	78.7
Under 35.....	210,890	150,680	71.4
35-44.....	212,160	167,670	79.0
45-54.....	160,910	133,520	82.9
55 or older.....	149,650	125,380	83.7
Students, aged 18-19.....	97,220	3,270	3.4
Children under age 18.....	2,979,660	2,977,290	99.9
In custody of parent payee.....	2,675,030	2,675,030	100.0
Not in custody of parent payee.....	304,630	302,260	99.2

<sup>1</sup> Includes special age-72 beneficiaries.

<sup>2</sup> Includes nondisabled widows and widowers, widowed mothers and fathers, and parents.



**5.M OASDI Current-Pay Benefits: International Agreements**

Table 5.M1.—Number of beneficiaries and average monthly benefit under U.S. totalization agreements, by country and type of benefit, December 1983–2000

Year and country	Total	Retired workers	Disabled workers	Wives and husbands	Widows and widowers <sup>1</sup>	Children
Number						
December:						
1983.....	1,541	970	97	266	109	99
1984.....	2,717	1,664	254	435	202	162
1985.....	7,857	4,773	404	1,730	578	372
1990.....	27,662	17,432	1,609	5,801	2,078	742
1995.....	54,806	35,925	2,428	10,974	4,431	1,048
1996.....	59,455	39,085	2,514	11,917	4,893	1,046
1997.....	63,842	42,163	2,662	12,583	5,342	1,092
1998.....	68,748	45,632	2,708	13,376	5,926	1,106
1999.....	74,933	50,018	2,749	14,421	6,636	1,109
2000.....	82,404	55,398	2,687	15,806	7,302	1,211
December 2000:						
Austria.....	614	464	45	67	25	13
Belgium.....	487	348	(2)	94	32	(2)
Canada.....	34,922	21,292	1,475	7,721	3,940	494
Finland.....	130	94	8	19	(2)	(2)
France.....	2,861	2,071	36	517	164	73
Germany.....	11,915	9,142	523	1,437	654	159
Greece.....	1,544	1,060	55	322	79	28
Ireland.....	833	601	27	132	53	20
Italy.....	6,789	4,385	97	1,277	931	99
Luxembourg.....	25	15	(2)	4	(2)	(2)
Netherlands.....	1,513	1,078	6	317	83	29
Norway.....	2,658	1,715	74	544	288	37
Portugal.....	1,504	1,005	78	252	139	30
Spain.....	1,532	945	57	345	149	36
Sweden.....	1,007	767	23	164	40	13
Switzerland.....	2,649	1,973	21	522	104	29
United Kingdom.....	11,421	8,443	155	2,072	615	136
Average benefit						
December:						
1983.....	\$62.61	\$68.77	\$145.68	\$24.01	\$49.27	\$40.16
1984.....	79.29	90.32	144.07	25.64	51.61	42.90
1985.....	73.52	86.52	147.43	32.04	60.94	38.79
1990.....	108.07	122.87	223.71	44.37	88.01	63.88
1995.....	134.13	155.20	271.21	51.27	108.60	69.88
1996.....	138.89	160.65	287.11	52.80	112.45	74.22
1997.....	143.69	165.94	298.78	54.24	115.62	74.27
1998.....	146.37	169.15	305.43	55.08	117.87	73.49
1999.....	151.22	174.94	312.05	56.58	123.64	78.56
2000.....	157.03	182.39	324.60	59.01	127.96	79.70
December 2000:						
Austria.....	202.49	229.06	206.33	60.40	154.64	65.00
Belgium.....	158.96	186.91	(2)	56.68	144.97	(2)
Canada.....	130.52	148.32	318.43	54.98	117.76	84.63
Finland.....	162.88	170.20	369.75	61.00	(2)	(2)
France.....	165.12	192.37	346.03	65.56	143.49	56.55
Germany.....	211.95	237.13	313.10	62.04	141.00	77.82
Greece.....	130.64	140.68	369.62	60.86	128.54	89.36
Ireland.....	177.69	191.67	476.70	74.76	163.64	70.70
Italy.....	142.58	169.47	380.48	56.85	115.53	78.33
Luxembourg.....	197.52	227.00	(2)	59.00	(2)	(2)
Netherlands.....	150.77	177.52	430.33	63.96	137.14	86.59
Norway.....	154.81	173.40	380.20	68.42	157.39	92.35
Portugal.....	142.41	152.50	314.01	59.93	132.82	95.57
Spain.....	134.61	150.91	337.42	55.53	142.60	110.42
Sweden.....	150.90	165.10	312.87	64.82	158.38	89.85
Switzerland.....	147.31	169.42	380.62	59.84	141.15	70.97
United Kingdom.....	195.83	229.33	331.32	66.93	164.78	65.63

<sup>1</sup> Includes nondisabled and disabled widow and widowers, and mothers and fathers.

<sup>2</sup> Not shown to avoid disclosure of information regarding particular individuals.

## 6.A OASDI Benefits Awarded: Summary

Table 6.A1.—Number, by type of benefit, 1940–2000

[Benefits not necessarily payable at time of award]

Year	Total	Retired workers	Disabled workers	Wives and husbands of—		Children of—			Widowed mothers and fathers	Widows and widowers	Parents	Special age-72 beneficiaries
				Retired workers	Disabled workers	Retired workers	Deceased workers	Disabled workers				
Total.....	177,112,105	72,766,968	18,381,693	17,247,276	3,605,831	6,793,237	20,021,267	13,407,601	4,661,199	18,845,987	113,622	1,267,424
1940.....	254,984	132,335	...	34,555	...	8,249	51,133	...	23,260	4,600	852	...
1941.....	269,286	114,660	...	36,213	...	6,031	69,588	...	30,502	11,020	1,272	...
1942.....	258,116	99,622	...	33,250	...	4,859	72,525	...	31,820	14,774	1,266	...
1943.....	262,865	89,070	...	31,916	...	3,652	81,967	...	35,420	19,576	1,264	...
1944.....	318,949	110,097	...	40,349	...	4,350	95,326	...	42,649	24,759	1,419	...
1945.....	462,463	185,174	...	63,068	...	7,215	120,299	...	55,108	29,844	1,755	...
1946.....	547,150	258,980	...	88,515	...	10,736	104,139	...	44,190	38,823	1,767	...
1947.....	572,909	271,488	...	94,189	...	12,446	103,308	...	42,807	45,249	3,422	...
1948.....	596,201	275,903	...	98,554	...	12,604	106,351	...	44,276	55,667	2,846	...
1949.....	682,241	337,273	...	117,356	...	15,854	103,068	...	43,087	62,928	2,675	...
1950.....	962,628	567,131	...	162,768	...	25,495	97,146	...	41,101	66,735	2,252	...
1951.....	1,336,432	702,984	...	228,887	...	40,958	189,542	...	78,323	89,591	6,147	...
1952.....	1,053,303	531,206	...	177,707	...	24,695	158,650	...	64,875	92,302	3,868	...
1953.....	1,419,462	771,671	...	246,856	...	33,868	178,310	...	71,945	112,866	3,946	...
1954.....	1,401,733	749,911	...	236,764	...	35,938	176,858	...	70,775	128,026	3,461	...
1955.....	1,657,773	909,883	...	288,915	...	40,402	198,393	...	76,018	140,624	3,538	...
1956.....	1,855,296	934,033	...	384,562	...	37,900	173,883	...	67,475	253,524	3,919	...
1957.....	2,832,344	1,424,975	178,802	578,012	...	81,842	231,321	...	88,174	244,633	4,585	...
1958 <sup>1</sup> .....	2,123,465	1,041,668	131,382	366,553	12,920	63,408	205,110	18,264	81,467	199,320	3,373	...
1959 <sup>2</sup> .....	2,501,802	1,089,740	177,811	390,517	54,299	83,157	265,123	78,655	102,020	252,683	7,797	...
1960.....	2,336,144	981,717	207,805	339,987	54,187	69,979	241,430	104,310	92,607	239,267	4,855	...
1961.....	3,046,653	1,361,505	279,758	394,198	77,588	126,019	264,440	189,283	98,449	251,275	4,138	...
1962.....	3,004,501	1,347,268	250,634	393,857	69,212	135,984	266,286	170,354	99,925	267,051	3,930	...
1963.....	2,729,559	1,145,602	223,739	345,610	66,543	115,220	281,511	163,967	104,960	278,709	3,698	...
1964.....	2,552,063	1,041,807	207,592	316,262	59,706	100,051	288,304	145,439	106,249	283,263	3,390	...
1965.....	3,072,426	1,183,133	253,499	321,015	69,183	134,187	451,399	197,616	100,005	359,431	2,958	...
1966.....	4,722,483	1,647,524	278,345	396,856	81,238	195,055	584,901	276,093	107,135	403,595	3,202	748,539
1967.....	3,596,770	1,161,130	301,359	319,503	87,296	167,676	534,568	282,662	110,762	355,589	2,658	273,567
1968.....	3,619,927	1,240,098	323,154	329,935	89,603	172,460	593,331	299,016	113,765	375,391	2,144	81,030
1969.....	3,699,633	1,272,784	344,741	335,723	94,690	176,162	622,109	313,629	116,922	375,753	2,093	45,027
1970.....	3,722,433	1,338,107	350,384	339,447	96,304	182,595	591,724	316,546	112,377	363,216	1,852	29,881
1971.....	3,965,157	1,391,403	415,897	338,219	113,222	196,589	613,193	372,224	116,548	381,262	1,635	24,965
1972.....	4,202,607	1,461,399	455,438	353,742	124,366	209,422	643,513	411,766	117,699	402,809	2,086	20,367
1973.....	4,220,493	1,493,194	491,616	349,493	128,198	217,708	618,825	413,751	118,775	372,167	1,655	15,111
1974.....	4,100,809	1,413,145	535,977	319,149	132,042	201,684	574,174	443,909	109,221	363,693	1,155	6,660
1975.....	4,427,138	1,505,750	592,049	350,558	148,741	225,579	591,118	515,216	116,224	377,246	969	3,688
1976.....	4,351,654	1,475,773	551,460	346,623	147,407	236,805	578,905	511,487	113,520	385,373	914	3,387
1977.....	4,610,730	1,593,631	568,874	390,874	151,938	259,447	587,589	518,477	118,821	416,735	870	3,474
1978.....	4,166,571	1,472,786	464,415	346,956	130,161	214,284	566,992	453,382	110,015	403,679	844	3,057
1979.....	4,229,286	1,590,854	416,713	358,163	113,243	247,800	544,549	399,172	110,424	445,555	788	2,025
1980.....	4,214,567	1,612,669	396,559	360,693	108,500	248,658	540,246	385,208	107,809	452,156	724	1,345
1981.....	4,029,827	1,578,990	351,847	338,540	95,575	211,406	535,487	339,654	99,653	477,121	606	948
1982.....	3,840,579	1,618,411	297,131	349,967	77,835	182,849	473,396	260,470	86,786	492,451	498	785
1983.....	3,755,994	1,669,738	311,549	356,274	80,079	144,945	380,992	226,895	82,464	501,688	431	939
1984.....	3,690,103	1,607,370	361,998	342,691	81,834	131,986	351,326	238,252	73,794	499,677	383	792
1985.....	3,796,394	1,690,490	377,371	356,558	83,511	128,076	332,531	253,025	72,241	501,673	381	537
1986.....	3,853,454	1,734,248	416,865	358,115	82,435	122,652	319,808	258,167	69,340	491,052	344	428
1987.....	3,733,853	1,681,716	415,848	333,333	77,316	117,984	310,573	256,742	64,777	475,035	286	243
1988.....	3,680,969	1,654,068	409,490	316,929	73,790	116,659	324,346	265,026	62,676	457,574	263	148
1989.....	3,646,349	1,656,744	425,582	310,498	69,113	106,491	307,484	261,387	59,525	449,139	281	105
1990.....	3,716,924	1,664,754	467,977	308,980	69,667	108,105	303,616	283,586	58,060	451,862	233	84
1991.....	3,865,426	1,695,346	536,434	307,000	72,754	107,261	301,459	318,188	57,896	468,788	246	54
1992.....	4,050,849	1,707,949	636,637	304,764	78,083	108,686	304,300	381,585	56,402	472,078	298	67
1993.....	4,001,201	1,661,281	635,238	290,728	74,605	106,566	311,290	398,598	56,408	466,198	238	51
1994.....	3,940,342	1,625,347	631,870	275,025	69,549	102,983	310,051	411,205	54,732	459,340	213	27
1995.....	3,882,193	1,609,174	645,832	258,740	63,097	101,239	306,044	401,295	51,645	444,899	200	28
1996.....	3,793,238	1,581,452	624,335	244,014	57,528	98,655	302,480	397,350	49,150	438,081	177	16
1997.....	3,865,966	1,718,623	587,417	268,012	50,818	97,594	297,204	362,548	43,504	440,076	157	13
1998.....	3,800,259	1,631,511	608,131	263,668	47,550	96,893	294,851	371,426	42,395	443,669	152	13
1999.....	3,917,099	1,690,024	620,488	275,568	46,164	99,826	295,196	378,144	41,756	469,806	118	9
2000.....	4,290,080	1,960,649	621,650	341,503	43,941	115,358	297,686	363,632	40,491	505,021	135	14

<sup>1</sup> January—November.

<sup>2</sup> Includes December 1958.

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## 6.A OASDI Benefits Awarded: Summary

Table 6.A2.—Average primary insurance amount for retired workers and average monthly benefit for retired workers, disabled workers, and widows, 1940–2000

Year <sup>1</sup>	Average primary insurance amount			Average monthly benefit						
	Retired workers			Retired workers			Disabled workers			Non-disabled widows
	Total	Men	Women	Total	Men	Women	Total	Men	Women	
1940.....	\$22.71	\$23.26	\$18.38	\$22.71	\$23.26	\$18.38	...	...	...	\$20.36
1945.....	25.11	25.71	19.99	25.11	25.71	19.99	...	...	...	20.17
1950 (Jan.-Aug.).....	29.03	30.16	22.98	29.03	30.16	22.98	...	...	...	21.65
1950 (Sept.-Dec.).....	33.24	35.32	26.85	33.24	35.32	26.85	...	...	...	36.89
1955.....	69.74	75.86	56.05	69.74	75.86	56.05	...	...	...	49.68
1960.....	83.87	92.03	69.23	81.73	92.03	63.26	\$91.16	\$94.02	\$78.91	62.12
1965 (Jan.-Aug.).....	88.57	96.56	74.99	82.69	90.89	68.78	93.26	97.89	80.27	73.81
1965 (Sept.-Dec.).....	99.36	108.79	82.34	89.20	99.90	71.26	101.30	106.51	86.75	75.37
1966.....	100.57	108.82	85.06	93.75	102.85	77.34	101.41	106.40	86.92	74.16
1967.....	96.62	105.83	81.66	89.74	99.05	74.63	101.84	106.95	87.04	77.68
1968 (Mar.-Dec.) <sup>2</sup> .....	111.82	122.00	95.49	103.82	114.15	87.25	115.67	121.77	98.35	90.02
1969.....	114.51	125.37	97.29	106.13	117.09	88.80	118.35	125.11	99.37	91.55
1970.....	133.94	146.99	113.69	123.82	136.80	103.67	139.79	148.39	115.74	106.95
1975 (Jan.-May).....	216.56	242.76	176.76	196.42	220.35	160.50	220.60	241.48	175.27	185.34
1975 (June-Dec.).....	235.13	264.67	191.56	213.68	241.05	173.31	243.47	266.08	192.13	198.88
1976 (Jan.-May).....	241.19	273.43	193.03	218.40	247.46	174.99	247.32	270.78	193.97	201.05
1976 (June-Dec.).....	257.95	293.96	206.65	233.72	266.64	186.84	271.19	297.10	213.29	214.22
1977 (Jan.-May).....	264.80	301.70	209.90	239.60	272.80	190.30	273.20	299.30	214.10	216.90
1977 (June-Dec.).....	280.20	322.30	221.50	254.90	293.20	201.40	294.80	323.20	230.00	227.40
1978 (Jan.-May).....	288.50	332.60	225.30	262.20	301.80	205.50	300.20	329.30	233.80	233.60
1978 (June-Dec.).....	305.00	356.00	237.60	278.40	324.70	217.10	328.80	360.70	254.70	246.50
1979 (Jan.-May).....	318.00	368.50	246.50	289.30	335.30	224.40	333.60	366.60	259.10	241.50
1979 (June-Dec.).....	348.50	406.00	269.10	317.00	370.80	242.80	360.30	396.50	278.30	275.60
1980 (Jan.-May).....	353.80	411.70	270.50	321.10	374.00	244.90	352.10	388.80	269.70	277.50
1980 (June-Dec.).....	396.30	465.50	301.00	359.80	422.90	272.90	396.50	437.90	301.00	312.80
1981 (Jan.-May).....	400.10	467.50	302.60	363.60	424.20	276.00	389.80	431.40	295.00	313.00
1981 (June-Dec.).....	438.80	514.50	332.60	400.10	468.00	304.80	425.60	471.30	320.70	346.30
1982 (Jan.-May).....	425.60	504.20	315.10	388.40	457.50	291.40	416.90	462.40	312.70	350.80
1982 (June-Dec.).....	447.10	532.70	328.50	408.60	483.00	305.50	441.10	489.50	328.00	375.30
1983 (Jan.-Nov.).....	448.00	531.60	330.00	408.20	480.30	306.50	432.40	480.30	317.90	385.10
1983 (Dec.).....	451.20	546.40	325.50	410.20	491.80	302.50	445.30	496.80	333.20	400.50
1984 (Jan.-Nov.).....	457.10	544.40	335.60	414.70	489.40	310.90	443.00	494.00	332.20	406.80
1984 (Dec.).....	471.00	565.70	343.00	429.50	511.30	318.90	461.10	516.50	342.90	428.00
1985 (Jan.-Nov.).....	475.70	566.20	348.00	432.00	509.60	322.20	459.20	514.00	345.00	431.10
1985 (Dec.).....	487.60	588.30	352.00	443.10	530.00	326.10	477.60	535.90	357.20	436.90
1986 (Jan.-Nov.).....	500.30	596.90	363.50	453.10	536.00	335.70	471.50	527.60	358.20	452.10
1986 (Dec.).....	504.60	611.00	361.70	456.90	548.40	334.00	489.00	546.90	369.60	446.20
1987 (Jan.-Nov.).....	516.80	618.90	374.10	466.10	553.60	343.90	487.00	546.80	368.90	462.00
1987 (Dec.).....	536.90	648.80	386.80	484.00	580.00	355.20	517.10	583.40	391.80	477.40
1988 (Jan.-Nov.).....	540.70	648.60	390.40	487.80	580.30	359.00	517.20	581.90	392.60	488.80
1988 (Dec.).....	560.00	679.50	401.20	504.90	607.00	369.20	543.00	612.70	410.00	499.20
1989 (Jan.-Nov.).....	572.80	686.90	412.90	516.60	614.80	379.00	539.90	608.00	414.40	512.90
1989 (Dec.).....	597.50	724.90	425.90	538.70	647.50	392.10	571.20	645.90	437.50	525.70
1990 (Jan.-Nov.).....	609.00	729.70	438.20	550.50	654.60	403.30	566.90	637.80	438.90	541.10
1990 (Dec.).....	626.40	761.00	447.30	559.30	672.10	409.30	600.60	676.90	466.60	566.60
1991 (Jan.-Nov.).....	642.80	768.90	460.40	583.50	692.30	426.10	593.00	666.90	464.20	573.70
1991 (Dec.).....	656.20	793.40	467.40	592.80	709.50	432.10	613.20	689.70	481.50	582.10
1992 (Jan.-Nov.).....	671.60	803.10	483.40	608.60	721.90	446.50	601.60	677.00	474.70	596.90
1992 (Dec.).....	688.30	829.30	493.80	620.70	740.90	454.90	625.70	706.50	490.30	604.00
1993 (Jan.-Nov.).....	697.10	831.50	507.10	630.60	746.20	467.00	621.70	699.80	494.70	620.70
1993 (Dec.).....	716.20	861.70	519.00	645.90	769.80	477.90	649.90	735.70	512.30	618.90
1994 (Jan.-Nov.).....	722.90	862.90	530.30	651.00	771.30	485.40	647.00	731.30	518.50	637.80
1994 (Dec.).....	741.90	892.40	541.50	665.70	794.20	494.50	684.80	776.50	549.00	644.60
1995 (Jan.-Nov.).....	744.30	887.00	551.40	671.70	794.30	505.80	675.70	767.30	546.00	662.50
1995 (Dec.).....	765.30	917.60	563.60	668.40	818.00	516.70	703.40	798.70	568.70	675.40
1996 (Jan.-Nov.).....	769.20	916.80	572.40	693.60	820.50	524.50	693.70	788.90	567.80	683.10
1996 (Dec.).....	788.90	950.20	582.90	708.70	846.00	533.30	727.70	832.00	590.00	690.30
1997 (Jan.-Nov.).....	787.10	951.70	608.50	723.30	854.30	581.30	718.30	820.40	590.70	700.60
1997 (Dec.).....	812.80	982.00	610.40	734.50	876.90	564.40	748.40	851.60	615.10	699.90
1998 (Jan.-Nov.).....	819.50	983.10	620.00	744.70	882.10	577.10	737.00	841.50	610.60	716.70
1998 (Dec.).....	831.10	1,003.20	628.80	754.20	898.40	584.70	762.00	870.30	633.80	711.00
1999 (Jan.-Nov.).....	857.60	1,023.20	649.50	777.10	918.40	599.60	763.90	870.60	636.60	713.30
1999 (Dec.).....	875.70	1,043.90	663.70	791.20	934.30	610.70	792.60	904.30	660.60	708.20
2000 (Jan.-Nov.).....	904.90	1,069.40	685.40	841.60	990.50	643.00	806.40	917.60	673.20	708.70
2000 (Dec.).....	930.00	1,111.00	713.00	842.80	996.50	658.50	846.60	960.20	710.00	715.40

<sup>1</sup> Some years shown in several parts to reflect amendments that change benefit rates during the year.

<sup>2</sup> Data for January and February not available.

CONTACT: Rona Blumenthal/Joseph Bondar (410) 965-0163/0162 for further information.

## 6.A OASDI Benefits Awarded: Summary

Table 6.A3.—Number and average monthly benefit, by type of benefit, age, sex, and race,<sup>1</sup> 2000

[Based on 1-percent sample]

Type of benefit, sex, and age in month of award	Total <sup>2</sup>		White		Black		Other	
	Number	Average monthly benefit <sup>3</sup>	Number	Average monthly benefit <sup>3</sup>	Number	Average monthly benefit <sup>3</sup>	Number	Average monthly benefit <sup>3</sup>
Retired workers <sup>4</sup>								
Total .....	1,968,100	\$873.30	1,625,400	\$904.70	177,000	\$761.70	158,300	\$680.60
62–64 .....	1,211,700	791.40	1,024,600	815.00	100,100	706.10	85,100	607.80
65–69 .....	719,700	1,011.50	578,200	1,060.10	73,200	839.20	63,100	785.80
70 or older .....	36,700	868.90	22,600	995.10	3,700	733.10	10,100	636.00
Men .....	1,114,600	1,026.80	933,600	1,071.10	92,300	850.90	84,500	738.00
62–64 .....	637,000	948.10	540,100	985.70	49,600	792.00	46,200	676.60
65–69 .....	463,000	1,137.30	383,200	1,190.80	41,100	925.90	35,700	831.00
70 or older .....	14,600	953.70	10,300	1,093.80	1,600	750.30	2,600	550.50
Women .....	853,500	672.90	691,800	680.20	84,700	664.50	73,800	614.80
62–64 .....	574,700	617.70	484,500	624.80	50,500	621.80	38,900	526.10
65–69 .....	256,700	784.60	195,000	803.30	32,100	728.10	27,400	727.00
70 or older .....	22,100	812.80	12,300	912.50	2,100	720.10	7,500	665.60
Disabled workers								
Total .....	612,200	\$833.80	424,200	\$872.20	101,800	\$771.40	84,300	\$713.20
Under 30 .....	38,900	514.00	24,900	532.90	7,600	459.10	6,400	505.90
30–39 .....	81,400	700.80	53,700	717.50	15,100	666.80	12,400	671.70
40–49 .....	150,100	813.70	98,100	845.50	28,500	761.90	23,400	743.60
50–54 .....	111,000	862.20	73,700	901.80	17,800	856.30	19,400	717.90
55–59 .....	130,300	928.40	98,000	955.50	19,700	880.00	11,700	768.60
60 or older .....	100,500	941.40	75,800	991.60	13,100	815.50	11,000	748.30
Men .....	329,800	947.50	231,000	1,002.50	52,000	843.30	45,400	784.70
Under 30 .....	22,500	532.90	13,900	549.10	4,400	502.10	4,200	511.60
30–39 .....	42,700	726.10	26,900	745.30	8,300	685.70	7,300	704.30
40–49 .....	77,200	905.50	51,000	947.60	14,700	820.50	11,400	827.80
50–54 .....	58,300	1,002.80	38,700	1,060.30	9,000	973.40	10,500	819.20
55–59 .....	69,300	1,089.90	52,600	1,133.80	9,500	982.30	6,700	876.90
60 or older .....	59,800	1,097.10	47,900	1,146.10	6,100	950.50	5,300	834.60
Women .....	282,400	701.00	193,200	716.50	49,800	696.40	38,900	629.60
Under 30 .....	16,400	488.10	11,000	512.30	3,200	400.10	2,200	494.90
30–39 .....	38,700	673.00	26,800	689.50	6,800	643.60	5,100	625.00
40–49 .....	72,900	716.50	47,100	734.90	13,800	699.40	12,000	663.70
50–54 .....	52,700	706.50	35,000	726.50	8,800	736.40	8,900	598.40
55–59 .....	61,000	744.90	45,400	748.90	10,200	784.70	5,000	623.50
60 or older .....	40,700	712.70	27,900	726.40	7,000	697.90	5,700	668.10
Wives								
Total .....	282,100	\$387.70	241,500	\$403.30	17,100	\$306.40	21,500	\$281.50
Wives of retired workers .....	245,300	412.30	212,200	426.10	13,200	341.60	18,200	306.60
Entitlement based on care of children ....	14,600	340.00	10,500	372.70	1,500	341.10	2,500	196.10
Entitlement based on age .....	230,700	416.90	201,700	428.80	11,700	341.70	15,700	324.20
62–64 .....	169,400	401.00	152,100	411.10	7,100	312.10	9,300	310.30
65–69 .....	53,200	474.00	43,600	494.10	3,400	397.60	5,600	368.00
70 or older .....	8,100	374.00	6,000	406.00	1,200	358.70	800	179.80
Wives of disabled workers .....	36,800	223.50	29,300	238.00	3,900	186.90	3,300	143.30
Entitlement based on care of children ....	15,500	169.10	11,100	190.90	1,800	126.90	2,500	101.90
Entitlement based on age .....	21,300	263.00	18,200	266.80	2,100	238.40	800	272.70
Husbands								
Total .....	11,400	\$215.80	6,900	\$214.40	1,200	\$285.40	3,300	\$193.40
Husbands of retired workers .....	9,700	229.50	5,600	1,133.80	1,000	307	3,100	195.70
Husbands of disabled workers .....	1,700	137.50	1,300	128.20	200	(5)	200	(5)

See footnotes at end of table.

## 6.A OASDI Benefits Awarded: Summary

Table 6.A3.—Number and average monthly benefit, by type of benefit, age, sex, and race,<sup>1</sup> 2000—Continued

[Based on 1-percent sample]

Type of benefit, sex, and age in month of award	Total <sup>2</sup>		White		Black		Other	
	Number	Average monthly benefit <sup>3</sup>	Number	Average monthly benefit <sup>3</sup>	Number	Average monthly benefit <sup>3</sup>	Number	Average monthly benefit <sup>3</sup>
Children								
Total.....	737,100	...	461,500	...	154,000	...	105,300	...
Children of retired workers.....	111,300	\$373.00	72,800	\$410.10	21,800	\$345.40	16,100	\$239.30
Children of deceased workers.....	281,500	560.50	165,500	618.00	59,700	494.30	41,600	434.70
Children of disabled workers.....	344,300	219.50	223,200	234.00	72,500	197.50	47,600	182.90
Under age 18.....	509,800	333.10	304,900	354.20	107,100	300.70	85,500	270.80
Disabled, aged 18 or older.....	37,500	391.30	26,500	403.60	5,900	386.40	4,100	287.10
Students, aged 18–19.....	189,800	476.20	130,100	504.80	41,000	411.40	15,700	402.00
Widowed mothers and fathers								
Total.....	37,300	\$588.70	24,200	\$607.50	4,900	\$562.00	5,000	\$478.90
Under 30.....	3,300	516.60	1,500	502.40	...	...	800	607.90
30–39.....	13,500	525.20	7,900	527.50	2,200	504.50	2,200	476.60
40–49.....	15,300	640.30	11,000	651.20	1,600	641.10	1,700	429.30
50–59.....	4,600	653.80	3,400	696.80	900	565.10	300	(5)
60 or older.....	600	595.50	400	(5)	200	(5)	...	...
Widowed mothers.....	34,500	596.80	22,100	624.50	4,700	555.80	4,600	470.30
Widowed fathers.....	2,800	488.60	2,100	428.60	200	(5)	400	(5)
Nondisabled widows and widowers								
Total.....	333,800	\$850.90	278,800	\$881.10	31,300	\$695.00	13,500	\$591.20
60–64.....	144,700	781.30	120,000	812.60	16,300	649.90	7,700	585.80
65–69.....	60,300	860.80	48,800	902.00	8,100	721.60	2,600	620.60
70–74.....	37,100	890.30	32,400	923.50	2,900	688.00	1,000	476.00
75 or older.....	91,700	938.40	77,600	956.20	4,000	829.80	2,200	628.10
Widows.....	318,200	866.60	266,000	898.70	29,500	697.60	12,700	597.00
Widowers.....	15,600	530.60	12,800	515.10	1,800	652.30	800	500.40
Disabled widows and widowers								
Total.....	27,700	\$516.40	18,700	\$545.20	6,800	\$426.70	1,900	\$556.50
50–54.....	9,000	512.30	5,500	556.70	3,000	431.10	300	(5)
55–59.....	16,400	517.70	11,700	541.90	3,300	423.90	1,300	513.60
60 or older.....	2,300	522.90	1,500	528.70	500	418.80	300	(5)
Widows.....	26,800	520.60	18,400	548.80	6,400	430.60	1,700	559.10
Widowers.....	900	389.50	300	(5)	400	(5)	200	(5)

<sup>1</sup> Race and ethnic designations are collected from the form SS-5 (Application for a Social Security Card). For dependents and survivor beneficiaries, race is assumed to be the same as that shown on the SS-5 for the wage earner on whose earnings record the benefit is based.

<sup>2</sup> Includes persons of unknown race.

<sup>3</sup> Benefits awarded before the December increase are converted to the December rates before computation of the averages.

<sup>4</sup> Includes conversions from nondisabled widow(er)'s benefits to higher retired-worker benefits.

<sup>5</sup> Average benefits not shown for fewer than 500 beneficiaries.

CONTACT: Rona Blumenthal/Joseph Bondar (410) 965-0163/0162 for further information.

## 6.A OASDI Benefits Awarded: Summary

Table 6.A4.—Number and average monthly benefit for **retired and disabled workers**, by age and sex, 2000

[Based on 1-percent sample]

Type of benefit and age in month of award	Total		Men		Women	
	Number	Average monthly benefit <sup>1</sup>	Number	Average monthly benefit <sup>1</sup>	Number	Average monthly benefit <sup>1</sup>
Retired workers <sup>2</sup>	1,968,100	\$873.30	1,114,600	\$1,026.80	853,500	\$672.90
62–64	1,211,700	791.40	637,000	948.10	574,700	617.70
62	909,700	762.30	464,100	921.70	445,600	596.30
63	118,100	846.90	68,100	980.20	50,000	665.30
64	183,900	899.70	104,800	1,044.10	79,100	708.30
65–69	719,700	1,011.50	463,000	1,137.30	256,700	784.60
65	553,900	971.90	352,800	1,098.50	201,100	749.90
Disability conversions	209,200	852.50	126,800	989.90	82,400	641.00
Newly entitled	344,700	1,044.40	226,000	1,159.40	118,700	825.40
66	69,000	1,100.10	47,700	1,194.90	21,300	887.60
67	42,200	1,133.70	27,300	1,267.30	14,900	889.00
68	32,200	1,180.10	20,900	1,311.00	11,300	938.00
69	22,400	1,244.40	14,300	1,399.70	8,100	970.20
70–74	31,500	901.50	12,500	1,024.90	19,000	820.30
75 or older	5,200	671.10	2,100	529.90	3,100	766.70
Disabled workers	612,200	833.80	329,800	947.50	282,400	701.00
Under 25	17,700	439.30	11,000	466.50	6,700	394.60
25–29	21,200	576.40	11,500	596.40	9,700	552.70
30–34	29,900	650.60	15,300	645.60	14,600	655.70
35–39	51,500	730.00	27,400	771.00	24,100	683.40
40–44	70,100	764.30	35,300	846.40	34,800	681.20
45–49	80,000	856.90	41,900	955.30	38,100	748.70
50–54	111,000	862.20	58,300	1,002.80	52,700	706.50
50	21,200	831.20	11,200	931.20	10,000	719.30
51	19,500	850.10	10,000	983.70	9,500	709.50
52	21,900	891.80	11,800	1,060.10	10,100	695.10
53	26,200	891.70	14,000	1,032.60	12,200	730.10
54	22,200	838.20	11,300	994.20	10,900	676.40
55–59	130,300	928.40	69,300	1,089.90	61,000	744.90
55	24,400	908.10	13,300	1,067.00	11,100	717.60
56	26,600	939.90	14,100	1,102.90	12,500	756.00
57	29,700	934.80	15,800	1,101.40	13,900	745.40
58	23,400	952.80	12,300	1,093.60	11,100	796.80
59	26,200	906.70	13,800	1,082.30	12,400	711.30
60–64	100,500	941.40	59,800	1,097.10	40,700	712.70
60	25,100	934.10	14,600	1,109.40	10,500	690.30
61	27,800	948.50	15,400	1,123.40	12,400	731.20
62	22,800	960.60	13,900	1,096.90	8,900	747.70
63	13,900	951.30	9,000	1,060.00	4,900	751.60
64 <sup>3</sup>	10,900	887.60	6,900	1,060.80	4,000	588.90

<sup>1</sup> Benefits awarded before the December increase are converted to the December rates before computation of the averages.

<sup>2</sup> Includes conversions from nondisabled widow(er)'s benefits to higher retired-worker benefits.

<sup>3</sup> Includes 1,300 beneficiaries with awards processed after attainment of age 65.

6.A OASDI Benefits Awarded: Summary

Table 6.A5.—Number and average monthly benefit with reduction for early retirement, by type of benefit, sex, and age, 2000

[Based on 1-percent sample]

Type of benefit and age in month of award	Total		Men		Women	
	Number	Average monthly benefit <sup>1</sup>	Number	Average monthly benefit <sup>1</sup>	Number	Average monthly benefit <sup>1</sup>
Retired workers .....	1,252,900	\$792.80	660,500	\$947.70	592,400	\$620.20
62 .....	909,700	762.30	464,100	921.70	445,600	596.30
63 .....	118,100	846.90	68,100	980.20	50,000	665.30
64 .....	174,600	898.10	99,200	1,042.70	75,400	707.90
65 .....	44,500	872.10	28,100	972.50	16,400	699.90
66 or older .....	6,000	707.00	1,000	648.90	5,000	718.70
Disabled workers .....	27,900	924.70	18,100	1,048.50	9,800	696.10
62 .....	10,000	951.00	6,500	1,059.10	3,500	750.40
63 .....	9,700	943.90	6,400	1,028.50	3,300	780.00
64 <sup>2</sup> .....	8,200	869.80	5,200	1,059.80	3,000	540.40
Wives and husbands, total .....	204,200	376.90	3,800	182.20	200,400	380.60
Wives and husbands of retired workers .....	183,400	391.10	3,100	187.40	180,300	394.60
Wives and husbands of disabled workers .....	20,800	251.90	700	159.40	20,100	255.10
Wives .....	200,400	380.60	...	...	200,400	380.60
62 .....	132,200	374.60	...	...	132,200	374.60
63 .....	29,900	414.60	...	...	29,900	414.60
64 .....	26,100	413.80	...	...	26,100	413.80
65 .....	7,300	332.60	...	...	7,300	332.60
66 .....	1,300	190.80	...	...	1,300	190.80
67 or older .....	3,600	245.50	...	...	3,600	245.50
Husbands .....	3,800	182.20	3,800	182.20	...	...
Nondisabled widows and widowers, total .....	163,900	769.50	10,200	558.40	153,700	783.50
Nondisabled widows .....	153,700	783.50	...	...	153,700	783.50
60 .....	68,100	771.80	...	...	68,100	771.80
61 .....	23,100	788.20	...	...	23,100	788.20
62 .....	16,800	812.50	...	...	16,800	812.50
63 .....	11,700	804.80	...	...	11,700	804.80
64 .....	12,900	923.90	...	...	12,900	923.90
65 .....	14,100	676.00	...	...	14,100	676.00
66 .....	1,100	763.50	...	...	1,100	763.50
67-69 .....	1,600	800.70	...	...	1,600	800.70
70 or older .....	4,300	700.50	...	...	4,300	700.50
Nondisabled widowers .....	10,200	558.40	10,200	558.40	...	...

<sup>1</sup> Benefits awarded before the December increase are converted to the December rates before computation of the averages.

<sup>2</sup> Includes 1,000 beneficiaries with awards processed after attainment of age 65.

## 6.A OASDI Benefits Awarded: Summary

Table 6.A6.—Number, percentage distribution, and average monthly benefit for retired and disabled workers, by state, 2000

State	Retired workers			Disabled workers		
	Number	Percent	Average monthly benefit <sup>1</sup>	Number	Percent	Average monthly benefit <sup>1</sup>
Total <sup>2</sup> .....	1,959,376	100.0	\$869.00	621,316	100.0	\$837.40
Alabama.....	33,451	1.7	839.00	15,597	2.5	810.70
Alaska.....	3,229	.2	843.80	1,113	.2	875.60
Arizona.....	34,383	1.8	885.80	11,750	1.9	852.30
Arkansas.....	20,443	1.0	801.90	8,630	1.4	790.90
California.....	202,484	10.3	869.60	54,890	8.8	812.50
Colorado.....	25,460	1.3	853.70	5,843	.9	857.20
Connecticut.....	25,100	1.3	950.40	7,296	1.2	894.50
Delaware.....	5,832	.3	925.20	2,018	.3	874.20
District of Columbia.....	3,755	.2	757.20	977	.2	787.90
Florida.....	124,050	6.3	835.40	35,259	5.7	826.10
Georgia.....	50,016	2.6	849.00	19,350	3.1	825.10
Hawaii.....	8,367	.4	852.10	2,124	.3	849.20
Idaho.....	8,720	.4	845.50	2,682	.4	806.00
Illinois.....	83,218	4.2	893.60	22,093	3.6	877.70
Indiana.....	43,152	2.2	922.00	13,039	2.1	863.30
Iowa.....	21,640	1.1	875.30	5,982	1.0	802.90
Kansas.....	17,782	.9	879.60	5,711	.9	826.90
Kentucky.....	27,692	1.4	825.90	13,958	2.2	812.40
Louisiana.....	26,634	1.4	798.50	10,682	1.7	816.20
Maine.....	9,705	.5	795.20	4,007	.6	749.90
Maryland.....	36,994	1.9	891.70	10,215	1.6	880.60
Massachusetts.....	44,156	2.3	882.00	14,572	2.3	831.60
Michigan.....	69,943	3.6	965.10	23,841	3.8	895.70
Minnesota.....	32,739	1.7	892.00	8,895	1.4	831.50
Mississippi.....	19,920	1.0	801.60	10,066	1.6	781.10
Missouri.....	41,052	2.1	856.00	16,517	2.7	833.40
Montana.....	6,661	.3	810.40	1,821	.3	808.00
Nebraska.....	11,599	.6	862.70	3,506	.6	783.10
Nevada.....	15,878	.8	856.30	4,401	.7	866.60
New Hampshire.....	9,121	.5	899.50	2,841	.5	841.80
New Jersey.....	63,470	3.2	959.20	16,978	2.7	929.50
New Mexico.....	12,396	.6	801.60	3,665	.6	811.30
New York.....	131,833	6.7	915.00	41,776	6.7	897.20
North Carolina.....	57,561	2.9	844.80	23,191	3.7	821.40
North Dakota.....	4,523	.2	829.30	983	.2	785.60
Ohio.....	79,166	4.0	884.70	22,001	3.5	830.90
Oklahoma.....	25,183	1.3	828.10	8,255	1.3	807.50
Oregon.....	24,321	1.2	871.50	6,887	1.1	832.10
Pennsylvania.....	94,623	4.8	913.30	30,219	4.9	846.30
Rhode Island.....	7,372	.4	878.80	2,950	.5	785.80
South Carolina.....	29,117	1.5	846.50	12,578	2.0	825.90
South Dakota.....	5,333	.3	802.60	1,304	.2	745.50
Tennessee.....	42,479	2.2	847.00	15,749	2.5	813.20
Texas.....	120,407	6.1	843.40	31,177	5.0	828.70
Utah.....	11,786	.6	886.10	2,727	.4	834.10
Vermont.....	4,335	.2	854.00	1,487	.2	795.40
Virginia.....	47,413	2.4	858.90	16,254	2.6	844.20
Washington.....	38,934	2.0	916.00	12,472	2.0	867.30
West Virginia.....	13,764	.7	857.80	6,925	1.1	877.90
Wisconsin.....	38,047	1.9	901.30	10,262	1.7	844.50
Wyoming.....	3,527	.2	855.90	861	.1	835.70
Outlying areas:						
Puerto Rico.....	22,434	1.1	612.00	11,603	1.9	692.70
Other areas and foreign countries <sup>3</sup> .....	18,176	.9	461.50	1,336	.2	618.20

<sup>1</sup> Benefits awarded before the December increase are converted to the December rates before computation of the averages.

<sup>2</sup> Includes beneficiaries with state code unknown.

<sup>3</sup> Includes American Samoa, Guam, Northern Mariana Islands, Virgin Islands, and foreign countries.



**6.B OASDI Benefits Awarded: Retired Workers**

Table 6.B1.—Number of initial awards to retired workers aged 62–64, average primary insurance amount, average monthly benefit, and number of months of benefits withheld due to earnings, by age and sex, 2000 <sup>1</sup>

[Based on 1-percent sample]

Age in month of award and sex	All initial awards <sup>2</sup>	Benefits received for all entitlement months <sup>3</sup>	Benefits withheld due to earnings		
			All entitlement months	One-half or more of entitlement months	Less than one-half of entitlement months
Number of beneficiaries					
Total .....	1,184,400	1,072,500	14,500	64,700	27,200
62 .....	896,100	835,400	10,000	31,100	15,500
63 .....	115,300	99,100	2,800	7,700	5,100
64 .....	173,000	138,000	1,700	25,900	6,600
Men .....	620,400	554,700	9,100	38,500	14,900
62 .....	456,300	421,700	6,100	17,800	8,200
63 .....	66,200	56,800	2,000	4,300	2,800
64 .....	97,900	76,200	1,000	16,400	3,900
Women.....	564,000	517,800	5,400	26,200	12,300
62 .....	439,800	413,700	3,900	13,300	7,300
63 .....	49,100	42,300	800	3,400	2,300
64 .....	75,100	61,800	700	9,500	2,700
Average primary insurance amount <sup>4</sup>					
Total .....	\$930.20	\$922.20	\$1,016.30	\$1,022.50	\$1,000.70
62 .....	931.50	928.40	1,002.50	992.00	979.20
63 .....	938.90	928.70	1,116.80	953.50	992.20
64 .....	917.40	880.10	932.00	1,079.60	1,058.00
Men .....	1,136.00	1,131.60	1,143.80	1,188.30	1,194.60
62 .....	1,151.90	1,151.60	1,136.20	1,181.50	1,181.80
63 .....	1,105.00	1,095.30	1,191.90	1,105.60	1,226.90
64 .....	1,082.70	1,047.50	1,094.00	1,217.50	1,198.20
Women.....	703.80	698.00	801.50	778.80	766.00
62 .....	702.80	700.90	793.50	738.50	751.60
63 .....	714.90	704.90	928.90	761.10	706.60
64 .....	701.90	673.70	700.50	841.60	855.50
Average monthly benefit <sup>4</sup>					
Total .....	\$795.30	\$785.90	\$854.80	\$915.00	\$869.00
62 .....	765.70	763.80	811.60	805.00	794.20
63 .....	854.00	847.20	988.20	855.40	891.00
64 .....	909.50	875.20	889.50	1,064.80	1,027.50
Men .....	949.20	940.10	961.20	1,057.30	1,032.50
62 .....	923.50	922.80	917.30	954.00	953.50
63 .....	981.50	972.70	1,052.40	938.70	1,097.50
64 .....	1,047.10	1,011.20	1,046.60	1,188.60	1,152.20
Women.....	626.00	620.70	675.50	705.90	670.80
62 .....	601.90	601.70	646.20	605.60	615.30
63 .....	682.20	678.60	827.90	693.10	639.50
64 .....	730.20	707.60	665.10	851.10	847.50

<sup>1</sup> Excludes persons whose benefits were converted from disabled worker to retired worker in 2000. Includes conversions from nondisabled widow(er)'s benefits to higher retired-worker benefits.

<sup>2</sup> Includes 5,500 awards for which benefits were withheld for reasons other than earnings.

<sup>3</sup> Months of entitlement begin with the month of award and end either in December 2000 or the month before the retired-worker benefit is terminated.

<sup>4</sup> Amount for December 2000 or the amount for the latest month of entitlement multiplied by the December benefit increase.

Note: Due to the elimination of the earnings test for beneficiaries aged 65 or older in 2000, Table 6.B1 includes data previously published in Table 6.B2 for beneficiaries aged 62-64.

### 6.B OASDI Benefits Awarded: Retired Workers

Table 6.B3.—Number and percentage distribution with and without reduction for early retirement, by **monthly benefit** and sex, 2000

[Based on 1-percent sample. Benefits not necessarily payable at time of award]

Monthly benefit and sex <sup>1</sup>	Total		Without reduction for early retirement		With reduction for early retirement	
	Number	Percent	Number	Percent	Number	Percent
<b>Total</b>	<b>1,968,100</b>	<b>100.0</b>	<b>715,200</b>	<b>100.0</b>	<b>1,252,900</b>	<b>100.0</b>
Less than \$450.00	264,100	13.4	65,400	9.1	198,700	15.9
\$450.00–\$499.90	92,400	4.7	19,400	2.7	73,000	5.8
\$500.00–\$549.90	106,300	5.4	21,600	3.0	84,700	6.8
\$550.00–\$599.90	101,500	5.2	22,200	3.1	79,300	6.3
\$600.00–\$649.90	89,300	4.5	26,800	3.7	62,500	5.0
\$650.00–\$699.90	82,800	4.2	27,100	3.8	55,700	4.4
\$700.00–\$749.90	79,300	4.0	26,800	3.7	52,500	4.2
\$750.00–\$799.90	71,600	3.6	24,200	3.4	47,400	3.8
\$800.00–\$849.90	70,400	3.6	24,100	3.4	46,300	3.7
\$850.00–\$899.90	71,600	3.6	25,600	3.6	46,000	3.7
\$900.00–\$949.90	66,400	3.4	22,900	3.2	43,500	3.5
\$950.00–\$999.90	70,800	3.6	25,600	3.6	45,200	3.6
\$1,000.00–\$1,049.90	71,500	3.6	24,800	3.5	46,700	3.7
\$1,050.00–\$1,099.90	74,700	3.8	25,700	3.6	49,000	3.9
\$1,100.00–\$1,149.90	101,500	5.2	26,000	3.6	75,500	6.0
\$1,150.00–\$1,199.90	97,200	4.9	25,600	3.6	71,600	5.7
\$1,200.00–\$1,249.90	94,800	4.8	24,500	3.4	70,300	5.6
\$1,250.00–\$1,299.90	98,000	5.0	40,100	5.6	57,900	4.6
\$1,300.00–\$1,349.90	54,600	2.8	33,000	4.6	21,600	1.7
\$1,350.00–\$1,399.90	49,700	2.5	34,400	4.8	15,300	1.2
\$1,400.00 or more	159,600	8.1	149,400	20.9	10,200	.8
<b>Average benefit, total</b>	<b>\$873.30</b>		<b>\$1,014.30</b>		<b>\$792.80</b>	
<b>Men</b>	<b>1,114,600</b>	<b>100.0</b>	<b>454,100</b>	<b>100.0</b>	<b>660,500</b>	<b>100.0</b>
Less than \$450.00	95,800	8.6	29,000	6.4	66,800	10.1
\$450.00–\$499.90	23,100	2.1	7,700	1.7	15,400	2.3
\$500.00–\$549.90	20,900	1.9	6,700	1.5	14,200	2.1
\$550.00–\$599.90	25,000	2.2	8,600	1.9	16,400	2.5
\$600.00–\$649.90	25,800	2.3	9,300	2.0	16,500	2.5
\$650.00–\$699.90	28,900	2.6	8,700	1.9	20,200	3.1
\$700.00–\$749.90	29,800	2.7	10,200	2.2	19,600	3.0
\$750.00–\$799.90	31,800	2.9	10,100	2.2	21,700	3.3
\$800.00–\$849.90	34,700	3.1	10,800	2.4	23,900	3.6
\$850.00–\$899.90	38,700	3.5	11,900	2.6	26,800	4.1
\$900.00–\$949.90	39,200	3.5	11,900	2.6	27,300	4.1
\$950.00–\$999.90	43,700	3.9	13,300	2.9	30,400	4.6
\$1,000.00–\$1,049.90	49,300	4.4	15,600	3.4	33,700	5.1
\$1,050.00–\$1,099.90	53,500	4.8	16,300	3.6	37,200	5.6
\$1,100.00–\$1,149.90	81,400	7.3	19,200	4.2	62,200	9.4
\$1,150.00–\$1,199.90	82,300	7.4	18,300	4.0	64,000	9.7
\$1,200.00–\$1,249.90	83,600	7.5	18,200	4.0	65,400	9.9
\$1,250.00–\$1,299.90	88,600	7.9	34,400	7.6	54,200	8.2
\$1,300.00–\$1,349.90	47,500	4.3	27,100	6.0	20,400	3.1
\$1,350.00–\$1,399.90	43,400	3.9	29,000	6.4	14,400	2.2
\$1,400.00 or more	147,600	13.2	137,800	30.3	9,800	1.5
<b>Average benefit, men</b>	<b>\$1,026.80</b>		<b>\$1,141.80</b>		<b>\$947.70</b>	
<b>Women</b>	<b>853,500</b>	<b>100.0</b>	<b>261,100</b>	<b>100.0</b>	<b>592,400</b>	<b>100.0</b>
Less than \$450.00	168,300	19.7	36,400	13.9	131,900	22.3
\$450.00–\$499.90	69,300	8.1	11,700	4.5	57,600	9.7
\$500.00–\$549.90	85,400	10.0	14,900	5.7	70,500	11.9
\$550.00–\$599.90	76,500	9.0	13,600	5.2	62,900	10.6
\$600.00–\$649.90	63,500	7.4	17,500	6.7	46,000	7.8
\$650.00–\$699.90	53,900	6.3	18,400	7.0	35,500	6.0
\$700.00–\$749.90	49,500	5.8	16,600	6.4	32,900	5.6
\$750.00–\$799.90	39,800	4.7	14,100	5.4	25,700	4.3
\$800.00–\$849.90	35,700	4.2	13,300	5.1	22,400	3.8
\$850.00–\$899.90	32,900	3.9	13,700	5.2	19,200	3.2
\$900.00–\$949.90	27,200	3.2	11,000	4.2	16,200	2.7
\$950.00–\$999.90	27,100	3.2	12,300	4.7	14,800	2.5
\$1,000.00–\$1,049.90	22,200	2.6	9,200	3.5	13,000	2.2
\$1,050.00–\$1,099.90	21,200	2.5	9,400	3.6	11,800	2.0
\$1,100.00–\$1,149.90	20,100	2.4	6,800	2.6	13,300	2.2
\$1,150.00–\$1,199.90	14,900	1.7	7,300	2.8	7,600	1.3
\$1,200.00–\$1,249.90	11,200	1.3	6,300	2.4	4,900	.8
\$1,250.00–\$1,299.90	9,400	1.1	5,700	2.2	3,700	.6
\$1,300.00–\$1,349.90	7,100	.8	5,900	2.3	1,200	.2
\$1,350.00–\$1,399.90	6,300	.7	5,400	2.1	900	.2
\$1,400.00 or more	12,000	1.4	11,600	4.4	400	.1
<b>Average benefit, women</b>	<b>\$672.90</b>		<b>\$792.60</b>		<b>\$620.20</b>	

<sup>1</sup> Benefits awarded before the December increase are converted to the December rates before computation of the percentages.

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## 6.B OASDI Benefits Awarded: Retired Workers

**Table 6.B4.—Number and percentage distribution with and without reduction for early retirement, by primary insurance amount and sex, 2000**

[Based on 1-percent sample. Benefits not necessarily payable at time of award]

Primary insurance amount and sex <sup>1</sup>	Total		Without reduction for early retirement		With reduction for early retirement	
	Number	Percent	Number	Percent	Number	Percent
<b>Total.....</b>	<b>1,968,100</b>	<b>100.0</b>	<b>715,200</b>	<b>100.0</b>	<b>1,252,900</b>	<b>100.0</b>
Less than \$450.00 .....	244,500	12.4	72,000	10.1	172,500	13.8
\$450.00—\$499.90 .....	66,100	3.4	23,800	3.3	42,300	3.4
\$500.00—\$549.90 .....	84,100	4.3	25,200	3.5	58,900	4.7
\$550.00—\$599.90 .....	79,500	4.0	23,800	3.3	55,700	4.4
\$600.00—\$649.90 .....	79,500	4.0	26,800	3.7	52,700	4.2
\$650.00—\$699.90 .....	77,700	3.9	27,400	3.8	50,300	4.0
\$700.00—\$749.90 .....	76,400	3.9	23,800	3.3	52,600	4.2
\$750.00—\$799.90 .....	66,000	3.4	24,600	3.4	41,400	3.3
\$800.00—\$849.90 .....	69,300	3.5	24,200	3.4	45,100	3.6
\$850.00—\$899.90 .....	71,300	3.6	25,600	3.6	45,700	3.6
\$900.00—\$949.90 .....	61,800	3.1	22,600	3.2	39,200	3.1
\$950.00—\$999.90 .....	64,500	3.3	24,700	3.5	39,800	3.2
\$1,000.00—\$1,049.90 .....	59,900	3.0	24,700	3.5	35,200	2.8
\$1,050.00—\$1,099.90 .....	63,000	3.2	25,000	3.5	38,000	3.0
\$1,100.00—\$1,149.90 .....	65,900	3.3	25,900	3.6	40,000	3.2
\$1,150.00—\$1,199.90 .....	63,100	3.2	25,200	3.5	37,900	3.0
\$1,200.00—\$1,249.90 .....	63,800	3.2	25,400	3.6	38,400	3.1
\$1,250.00—\$1,299.90 .....	92,200	4.7	45,500	6.4	46,700	3.7
\$1,300.00—\$1,349.90 .....	84,500	4.3	38,800	5.4	45,700	3.6
\$1,350.00—\$1,399.90 .....	92,900	4.7	38,100	5.3	54,800	4.4
\$1,400.00 or more.....	342,100	17.4	122,100	17.1	220,000	17.6
<b>Average primary insurance amount, total .....</b>	<b>\$944.90</b>		<b>\$977.60</b>		<b>\$926.30</b>	
<b>Men .....</b>	<b>1,114,600</b>	<b>100.0</b>	<b>454,100</b>	<b>100.0</b>	<b>660,500</b>	<b>100.0</b>
Less than \$450.00 .....	77,000	6.9	29,000	6.4	48,000	7.3
\$450.00—\$499.90 .....	18,000	1.6	9,100	2.0	8,900	1.3
\$500.00—\$549.90 .....	21,000	1.9	7,300	1.6	13,700	2.1
\$550.00—\$599.90 .....	19,700	1.8	9,100	2.0	10,600	1.6
\$600.00—\$649.90 .....	21,500	1.9	9,400	2.1	12,100	1.8
\$650.00—\$699.90 .....	21,700	1.9	8,600	1.9	13,100	2.0
\$700.00—\$749.90 .....	26,900	2.4	10,200	2.2	16,700	2.5
\$750.00—\$799.90 .....	21,700	1.9	10,000	2.2	11,700	1.8
\$800.00—\$849.90 .....	26,400	2.4	10,900	2.4	15,500	2.3
\$850.00—\$899.90 .....	32,400	2.9	12,500	2.8	19,900	3.0
\$900.00—\$949.90 .....	31,300	2.8	12,100	2.7	19,200	2.9
\$950.00—\$999.90 .....	35,600	3.2	13,900	3.1	21,700	3.3
\$1,000.00—\$1,049.90 .....	37,000	3.3	16,000	3.5	21,000	3.2
\$1,050.00—\$1,099.90 .....	40,700	3.7	17,300	3.8	23,400	3.5
\$1,100.00—\$1,149.90 .....	47,300	4.2	19,700	4.3	27,600	4.2
\$1,150.00—\$1,199.90 .....	44,700	4.0	18,300	4.0	26,400	4.0
\$1,200.00—\$1,249.90 .....	46,200	4.1	19,000	4.2	27,200	4.1
\$1,250.00—\$1,299.90 .....	75,200	6.7	38,200	8.4	37,000	5.6
\$1,300.00—\$1,349.90 .....	70,800	6.4	33,100	7.3	37,700	5.7
\$1,350.00—\$1,399.90 .....	79,200	7.1	33,400	7.4	45,800	6.9
\$1,400.00 or more.....	320,300	28.7	117,000	25.8	203,300	30.8
<b>Average primary insurance amount, men .....</b>	<b>\$1,119.90</b>		<b>\$1,108.90</b>		<b>\$1,127.50</b>	
<b>Women .....</b>	<b>853,500</b>	<b>100.0</b>	<b>261,100</b>	<b>100.0</b>	<b>592,400</b>	<b>100.0</b>
Less than \$450.00 .....	167,500	19.6	43,000	16.5	124,500	21.0
\$450.00—\$499.90 .....	48,100	5.6	14,700	5.6	33,400	5.6
\$500.00—\$549.90 .....	63,100	7.4	17,900	6.9	45,200	7.6
\$550.00—\$599.90 .....	59,800	7.0	14,700	5.6	45,100	7.6
\$600.00—\$649.90 .....	58,000	6.8	17,400	6.7	40,600	6.9
\$650.00—\$699.90 .....	56,000	6.6	18,800	7.2	37,200	6.3
\$700.00—\$749.90 .....	49,500	5.8	13,600	5.2	35,900	6.1
\$750.00—\$799.90 .....	44,300	5.2	14,600	5.6	29,700	5.0
\$800.00—\$849.90 .....	42,900	5.0	13,300	5.1	29,600	5.0
\$850.00—\$899.90 .....	38,900	4.6	13,100	5.0	25,800	4.4
\$900.00—\$949.90 .....	30,500	3.6	10,500	4.0	20,000	3.4
\$950.00—\$999.90 .....	28,900	3.4	10,800	4.1	18,100	3.1
\$1,000.00—\$1,049.90 .....	22,900	2.7	8,700	3.3	14,200	2.4
\$1,050.00—\$1,099.90 .....	22,300	2.6	7,700	2.9	14,600	2.5
\$1,100.00—\$1,149.90 .....	18,600	2.2	6,200	2.4	12,400	2.1
\$1,150.00—\$1,199.90 .....	18,400	2.2	6,900	2.6	11,500	1.9
\$1,200.00—\$1,249.90 .....	17,600	2.1	6,400	2.5	11,200	1.9
\$1,250.00—\$1,299.90 .....	17,000	2.0	7,300	2.8	9,700	1.6
\$1,300.00—\$1,349.90 .....	13,700	1.6	5,700	2.2	8,000	1.4
\$1,350.00—\$1,399.90 .....	13,700	1.6	4,700	1.8	9,000	1.5
\$1,400.00 or more.....	21,800	2.6	5,100	2.0	16,700	2.8
<b>Average primary insurance amount, women .....</b>	<b>\$716.40</b>		<b>\$749.20</b>		<b>\$701.90</b>	

<sup>1</sup> Primary insurance amounts awarded before the December increase are converted to the December rates before computation of the percentages.

## 6.B OASDI Benefits Awarded: Retired Workers

Table 6.B5.—Number, average age, and percentage distribution, by age and sex, 1940–2000

Year	Total number (in thousands)	Average age	Percentage distribution, by age <sup>1</sup>									
			Total	62–64	62	63	64	65–69	70–74	75–79	80 or older	
Men												
1940.....	99	68.8	100.0	...	...	...	...	...	74.4	17.4	6.4	1.8
1945.....	166	69.6	100.0	...	...	...	...	...	59.2	28.1	10.4	2.3
1950.....	444	68.7	100.0	...	...	...	...	...	69.2	21.0	7.4	2.3
1955.....	629	68.4	100.0	...	...	...	...	...	67.5	24.7	6.8	1.1
1960.....	630	66.8	100.0	...	...	...	...	...	84.7	13.2	1.3	.7
1965.....	743	65.8	100.0	30.2	14.7	9.6	5.9	57.5	8.3	1.8	2.2	
1970.....	814	64.4	100.0	39.4	18.4	12.6	8.4	58.8	1.4	.3	.1	
1975.....	902	64.0	100.0	48.9	25.8	14.1	9.0	50.2	.7	.2	(2)	
1980.....	942	63.9	100.0	51.7	30.1	13.1	8.5	47.6	.6	.1	(2)	
1981.....	926	63.8	100.0	54.5	30.8	14.8	8.9	44.9	.5	.1	(2)	
1982.....	942	63.7	100.0	56.5	34.4	14.4	7.7	42.9	.5	.1	(2)	
1983.....	976	63.7	100.0	57.4	35.8	14.7	6.9	41.8	.7	.1	(2)	
1984.....	934	63.7	100.0	58.8	36.4	15.2	7.2	40.5	.6	.1	(2)	
1985 <sup>3</sup> .....	986	63.7	100.0	65.7	45.5	8.2	12.0	33.6	.5	.1	(2)	
1986 <sup>3</sup> .....	1,011	63.7	100.0	67.0	47.0	8.2	11.8	32.3	.6	.1	(2)	
1987 <sup>3</sup> .....	970	63.6	100.0	67.1	47.6	8.1	11.4	32.3	.6	.1	(2)	
1988 <sup>3</sup> .....	944	63.7	100.0	66.2	48.2	8.1	9.9	32.7	.9	.1	.1	
1989 <sup>3</sup> .....	983	63.7	100.0	64.4	48.0	7.1	9.3	34.7	.7	.1	(2)	
1990 <sup>3</sup> .....	964	63.7	100.0	66.1	47.2	7.6	11.3	32.7	1.0	.2	(2)	
1991 <sup>3</sup> .....	996	63.7	100.0	65.8	46.8	8.1	10.9	33.0	.9	.1	.1	
1992 <sup>3</sup> .....	989	63.7	100.0	66.9	48.2	7.3	11.4	32.2	.8	.1	(2)	
1993 <sup>3</sup> .....	980	63.7	100.0	67.8	48.8	8.0	11.0	31.1	.9	.1	(2)	
1994 <sup>3</sup> .....	923	63.6	100.0	67.8	49.0	7.4	11.4	31.2	1.0	.1	(2)	
1995 <sup>3</sup> .....	916	63.7	100.0	67.1	49.3	7.3	10.5	31.5	1.1	.2	.1	
1996 <sup>3</sup> .....	895	63.6	100.0	66.7	49.9	7.1	9.7	32.1	1.1	.1	(2)	
1997 <sup>3,4</sup> .....	904	63.7	100.0	66.8	50.5	6.6	9.7	31.6	1.3	.2	.1	
1998 <sup>3,4</sup> .....	909	63.8	100.0	66.6	49.6	7.1	9.9	31.9	1.3	.1	.1	
1999 <sup>3,4</sup> .....	940	63.7	100.0	66.4	49.3	7.3	9.8	32.1	1.3	.1	.1	
2000 <sup>3,4</sup> .....	1,115	64.1	100.0	57.1	41.6	6.1	9.4	41.5	1.1	.2	(2)	
Women												
1940.....	13	68.1	100.0	...	...	...	...	82.6	12.8	3.9	.6	
1945.....	20	73.3	100.0	...	...	...	...	69.1	23.6	6.2	1.2	
1950.....	123	68.0	100.0	...	...	...	...	75.9	19.6	3.7	.8	
1955.....	281	67.8	100.0	...	...	...	...	75.4	18.1	5.5	1.1	
1960.....	351	65.2	100.0	48.5	27.1	13.3	8.1	40.6	8.2	1.9	.8	
1965.....	440	66.2	100.0	48.4	30.9	11.6	5.9	37.6	7.4	3.5	3.1	
1970.....	524	63.9	100.0	56.0	34.7	14.1	7.2	41.4	1.9	.5	.2	
1975.....	603	63.7	100.0	62.3	41.6	13.7	7.0	36.1	1.2	.3	.1	
1980.....	671	63.5	100.0	63.9	45.9	11.5	6.5	34.9	.9	.2	.1	
1981.....	653	63.6	100.0	64.1	43.8	13.2	7.1	34.8	.8	.2	.1	
1982.....	676	63.4	100.0	66.9	46.6	14.5	5.9	32.1	.8	.1	.1	
1983.....	694	63.4	100.0	67.2	47.6	14.2	5.4	31.5	1.0	.2	.1	
1984.....	674	63.4	100.0	68.4	47.6	14.9	5.9	30.3	1.0	.2	.1	
1985 <sup>2</sup> .....	697	63.4	100.0	75.2	57.9	7.4	9.9	23.7	.8	.1	.1	
1986 <sup>3</sup> .....	713	63.4	100.0	74.9	57.5	7.0	10.4	24.1	.9	.1	(2)	
1987 <sup>3</sup> .....	681	63.3	100.0	75.7	58.9	7.2	9.6	23.4	.7	.2	(2)	
1988 <sup>3</sup> .....	667	63.3	100.0	74.2	59.4	6.9	7.9	24.8	.7	.1	.1	
1989 <sup>3</sup> .....	674	63.4	100.0	73.8	57.9	6.5	9.4	24.9	1.0	.2	.1	
1990 <sup>3</sup> .....	679	63.5	100.0	72.9	55.9	7.2	9.8	25.6	1.0	.3	.2	
1991 <sup>3</sup> .....	685	63.5	100.0	72.7	56.1	7.1	9.5	26.1	.9	.2	.1	
1992 <sup>3</sup> .....	708	63.5	100.0	73.4	56.7	6.9	9.8	25.3	1.1	.2	.1	
1993 <sup>3</sup> .....	704	63.5	100.0	73.0	56.0	6.8	10.2	25.5	1.1	.2	.1	
1994 <sup>3</sup> .....	690	63.4	100.0	74.5	57.6	6.7	10.2	24.3	1.0	.2	.1	
1995 <sup>3</sup> .....	684	63.5	100.0	72.1	55.4	6.6	10.1	26.1	1.4	.2	.2	
1996 <sup>3</sup> .....	684	63.4	100.0	72.7	57.4	5.9	9.4	26.0	1.0	.2	.1	
1997 <sup>3,4</sup> .....	809	65.4	100.0	61.2	48.2	5.5	7.5	23.9	6.4	4.4	4.1	
1998 <sup>3,4</sup> .....	733	64.0	100.0	69.0	53.1	7.0	8.9	26.1	2.4	1.1	1.3	
1999 <sup>3,4</sup> .....	737	63.6	100.0	71.1	55.1	6.8	9.2	26.4	1.8	.4	.3	
2000 <sup>3,4</sup> .....	854	63.8	100.0	67.4	52.2	5.9	9.3	30.1	2.2	.2	.2	

<sup>1</sup> Age in year of award for 1940–1984. Age in month of award for 1985–2000.

<sup>2</sup> Less than 0.05 percent.

<sup>3</sup> Based on 1-percent sample.

<sup>4</sup> Includes conversions from nondisabled widow(er)'s benefits to higher retired-worker benefits.

CONTACT: Diane Wallace/Barbara Lingg (410) 965-0165/0156 for further information.

Table 6.C1.—Number and percentage distribution, by monthly benefit and sex, 2000

[Based on 1-percent sample]

Monthly benefit <sup>1</sup>	Total		Men		Women	
	Number	Percent	Number	Percent	Number	Percent
Total .....	612,200	100.0	329,800	100.0	282,400	100.0
Less than \$100.00 .....	5,800	.9	2,500	.8	3,300	1.2
\$100.00–\$149.90 .....	3,400	.6	1,200	.4	2,200	.8
\$150.00–\$199.90 .....	6,800	1.1	2,900	.9	3,900	1.4
\$200.00–\$249.90 .....	9,300	1.5	3,100	.9	6,200	2.2
\$250.00–\$299.90 .....	11,300	1.8	3,800	1.2	7,500	2.7
\$300.00–\$349.90 .....	13,800	2.3	4,800	1.5	9,000	3.2
\$350.00–\$399.90 .....	14,800	2.4	5,000	1.5	9,800	3.5
\$400.00–\$449.90 .....	17,300	2.8	4,900	1.5	12,400	4.4
\$450.00–\$499.90 .....	28,900	4.7	10,100	3.1	18,800	6.7
\$500.00–\$549.90 .....	37,000	6.0	14,000	4.2	23,000	8.1
\$550.00–\$599.90 .....	38,600	6.3	15,300	4.6	23,300	8.3
\$600.00–\$649.90 .....	33,300	5.4	13,300	4.0	20,000	7.1
\$650.00–\$699.90 .....	32,800	5.4	14,100	4.3	18,700	6.6
\$700.00–\$749.90 .....	32,400	5.3	15,200	4.6	17,200	6.1
\$750.00–\$799.90 .....	28,700	4.7	13,100	4.0	15,600	5.5
\$800.00–\$849.90 .....	29,400	4.8	15,700	4.8	13,700	4.9
\$850.00–\$899.90 .....	25,000	4.1	13,800	4.2	11,200	4.0
\$900.00–\$949.90 .....	25,600	4.2	16,300	4.9	9,300	3.3
\$950.00–\$999.90 .....	23,100	3.8	13,700	4.2	9,400	3.3
\$1,000.00–\$1,049.90 .....	18,700	3.1	11,400	3.5	7,300	2.6
\$1,050.00–\$1,099.90 .....	19,800	3.2	13,400	4.1	6,400	2.3
\$1,100.00–\$1,149.90 .....	17,900	2.9	12,200	3.7	5,700	2.0
\$1,150.00–\$1,199.90 .....	15,400	2.5	10,500	3.2	4,900	1.7
\$1,200.00–\$1,249.90 .....	16,100	2.6	13,200	4.0	2,900	1.0
\$1,250.00–\$1,299.90 .....	15,500	2.5	11,200	3.4	4,300	1.5
\$1,300.00–\$1,349.90 .....	18,100	3.0	13,200	4.0	4,900	1.7
\$1,350.00–\$1,399.90 .....	20,200	3.3	16,000	4.9	4,200	1.5
\$1,400.00 or more .....	53,200	8.7	45,900	13.9	7,300	2.6
<b>Average benefit .....</b>	<b>\$833.80</b>		<b>\$947.50</b>		<b>\$701.00</b>	

<sup>1</sup> Benefits awarded before the December increase are converted to the December rates before computation of the percentages.

## 6.C OASDI Benefits Awarded: Disabled Workers

Table 6.C2.—Number, average age, and percentage distribution, by age and sex, 1957–2000

Year	Total number	Average age	Percentage distribution, by age <sup>1</sup>									
			Total	Under 30	30–39	40–44	45–49	50–54	55–59	60–61	62–64	65 <sup>2</sup>
Men												
1957	148,376	59.2	100.0	...	...	...	...	17.1	28.0	17.0	33.8	4.1
1958	107,003	59.0	100.0	...	...	...	...	19.7	27.5	15.2	28.9	8.7
1959	146,547	58.9	100.0	...	...	...	...	21.1	27.4	14.8	28.8	7.8
1960	168,466	54.5	100.0	8	7.0	6.5	10.5	16.7	20.0	11.8	21.3	5.4
1965	186,808	53.0	100.0	1.8	8.2	7.9	11.1	17.1	25.7	14.0	13.0	1.0
1970	258,072	52.1	100.0	6.7	7.6	6.5	10.1	14.7	23.5	12.3	16.1	2.6
1975	408,531	51.5	100.0	7.7	8.6	6.2	9.5	15.7	23.1	12.1	14.6	2.5
1980	275,185	51.2	100.0	8.3	9.7	6.0	8.4	14.7	24.6	12.3	14.2	1.8
1981	244,984	50.8	100.0	8.6	10.2	6.2	8.4	14.5	24.3	13.0	13.1	1.7
1982	207,453	50.9	100.0	8.4	10.4	6.3	8.4	14.1	24.6	12.9	13.6	1.2
1983	217,422	50.2	100.0	9.5	11.7	6.6	8.4	13.6	23.4	12.2	13.3	1.3
1984	247,833	50.0	100.0	9.2	12.8	7.1	8.7	13.4	22.6	12.2	12.7	1.3
1985 <sup>3</sup>	274,400	50.1	100.0	8.7	13.3	7.0	9.9	14.6	23.1	12.4	10.6	.3
1986 <sup>3</sup>	273,700	48.7	100.0	10.7	15.3	8.1	9.4	14.3	21.3	11.1	9.5	.3
1987 <sup>3</sup>	265,900	49.0	100.0	9.4	16.0	8.6	9.3	13.9	20.8	10.9	11.0	.2
1988 <sup>3</sup>	265,700	49.2	100.0	8.4	16.0	9.7	9.0	14.6	21.3	10.5	10.2	.2
1989 <sup>3</sup>	268,600	49.0	100.0	8.7	16.0	9.5	10.2	14.2	20.6	9.7	10.8	.3
1990 <sup>3</sup>	293,300	48.1	100.0	10.9	16.9	9.4	9.5	13.5	20.5	10.3	8.8	.1
1991 <sup>3</sup>	322,700	47.9	100.0	9.5	17.7	10.6	11.0	14.1	18.4	9.4	9.1	.2
1992 <sup>3</sup>	395,600	47.8	100.0	9.5	18.5	10.8	11.0	13.0	18.6	9.8	8.7	.2
1993 <sup>3</sup>	391,800	47.7	100.0	9.2	18.9	10.1	11.7	14.7	18.8	8.6	7.8	.2
1994 <sup>3</sup>	379,300	48.4	100.0	6.8	18.4	10.8	12.7	15.4	19.3	9.0	7.6	.1
1995 <sup>3</sup>	368,400	48.9	100.0	7.2	16.3	10.7	11.5	15.7	20.4	8.9	9.1	.2
1996 <sup>3</sup>	347,100	48.7	100.0	6.9	16.2	10.8	13.2	16.2	19.9	9.3	7.5	.1
1997 <sup>3</sup>	311,100	49.3	100.0	6.3	14.6	10.8	13.5	16.1	21.6	8.8	8.2	.1
1998 <sup>3</sup>	331,400	49.2	100.0	6.3	14.3	11.1	12.4	18.3	21.6	8.1	7.8	.2
1999 <sup>3</sup>	338,900	49.6	100.0	6.2	13.1	11.4	12.4	18.3	21.7	8.8	8.0	.3
2000 <sup>3</sup>	329,800	49.6	100.0	6.8	12.9	10.7	12.7	17.7	21.0	9.1	8.8	.2
Women												
1957	30,426	57.4	100.0	...	...	...	...	25.5	38.9	19.8	15.3	.5
1958	24,379	57.2	100.0	...	...	...	...	28.6	37.2	17.8	15.2	1.2
1959	31,264	57.0	100.0	...	...	...	...	30.2	36.9	17.6	14.2	1.1
1960	39,339	52.5	100.0	.7	8.1	8.0	13.3	21.9	24.6	12.4	10.1	.8
1965	66,691	53.2	100.0	1.1	6.5	7.4	11.7	19.3	28.3	14.1	10.9	.6
1970	92,312	52.8	100.0	4.2	6.3	6.1	11.0	17.5	27.2	13.0	12.9	1.7
1975	183,518	52.1	100.0	6.1	7.3	6.1	10.1	17.7	25.5	12.2	12.9	2.1
1980	121,374	51.1	100.0	7.4	9.7	6.4	9.3	16.3	25.5	11.7	12.2	1.5
1981	106,863	50.8	100.0	7.8	10.2	6.5	9.5	16.4	25.1	12.0	11.1	1.4
1982	89,678	50.5	100.0	8.0	10.9	6.8	9.5	15.6	24.9	11.7	11.4	1.1
1983	94,127	49.8	100.0	9.0	12.2	7.4	9.5	14.8	23.5	10.9	11.6	1.1
1984	114,165	49.7	100.0	8.3	13.2	7.9	9.7	14.9	22.8	10.9	11.7	1.2
1985 <sup>3</sup>	134,500	49.7	100.0	8.6	12.9	8.0	10.6	15.8	23.3	10.1	10.5	.1
1986 <sup>3</sup>	135,700	48.8	100.0	9.0	15.5	10.4	10.5	14.8	21.3	9.6	8.6	.2
1987 <sup>3</sup>	143,700	49.5	100.0	7.5	15.2	8.1	11.2	15.8	23.4	9.6	8.8	.3
1988 <sup>3</sup>	147,000	49.3	100.0	8.5	14.0	8.8	10.9	16.1	23.5	10.5	7.4	.3
1989 <sup>3</sup>	146,900	49.1	100.0	7.8	14.8	10.4	11.9	13.8	21.2	10.8	8.9	.3
1990 <sup>3</sup>	168,500	48.4	100.0	8.5	16.3	9.8	13.1	14.2	22.3	8.9	6.5	.4
1991 <sup>3</sup>	190,400	48.4	100.0	8.5	16.8	10.1	12.2	16.2	19.5	8.9	7.4	.4
1992 <sup>3</sup>	241,300	47.7	100.0	8.6	17.7	12.0	12.4	15.6	17.6	8.4	7.5	.2
1993 <sup>3</sup>	237,900	48.1	100.0	7.5	17.5	11.2	13.1	16.5	19.7	6.8	7.4	.2
1994 <sup>3</sup>	234,000	48.2	100.0	7.4	16.9	11.1	12.9	17.0	20.8	7.3	6.4	.2
1995 <sup>3</sup>	263,200	48.5	100.0	6.4	16.7	11.4	13.8	17.2	20.5	7.6	6.3	.1
1996 <sup>3</sup>	256,900	49.1	100.0	5.3	15.1	11.3	14.0	19.0	21.2	8.3	5.8	.1
1997 <sup>3</sup>	250,200	48.4	100.0	6.2	16.3	12.2	14.1	19.0	19.0	6.8	6.2	.2
1998 <sup>3</sup>	271,900	48.9	100.0	5.4	14.9	12.2	14.5	19.1	20.4	7.6	5.7	.2
1999 <sup>3</sup>	266,900	48.7	100.0	5.7	14.6	12.5	15.3	18.2	20.6	6.6	6.2	.3
2000 <sup>3</sup>	282,400	49.2	100.0	5.8	13.7	12.3	13.5	18.7	21.6	8.1	6.1	.2

<sup>1</sup> Age in year of award for 1957–1984. Age in month of award for 1985–2000.

<sup>2</sup> Includes awards processed after attainment of age 65.

<sup>3</sup> Based on 1-percent sample.

CONTACT: Joseph Bondar/Diane Wallace (410) 965-0162/0165 for further information.

6.C OASDI Benefits Awarded: Disabled Workers

Table 6.C3.—Number and percentage distribution, by diagnostic group, age, and sex, 2000<sup>1,2</sup>

Diagnostic group	Total				Men				Women			
	Total	Under 35	35–49	50 or older	Total	Under 35	35–49	50 or older	Total	Under 35	35–49	50 or older
Number												
Total .....	621,316	60,121	193,066	368,129	338,784	32,720	100,642	205,422	282,532	27,401	92,424	162,707
Diagnosis available .....	620,017	60,068	192,886	367,063	338,054	32,687	100,554	204,813	281,963	27,381	92,332	162,250
Infectious and parasitic diseases <sup>3</sup> .....	11,273	1,928	6,126	3,219	8,368	1,428	4,811	2,129	2,905	500	1,315	1,090
Neoplasms .....	67,791	3,627	18,520	45,644	35,351	1,885	8,604	24,862	32,440	1,742	9,916	20,782
Endocrine, nutritional, and metabolic diseases .....	18,617	1,271	5,122	12,224	9,692	566	2,577	6,549	8,925	705	2,545	5,675
Diseases of blood and blood-forming organs .....	2,029	454	642	933	1,006	226	285	495	1,023	228	357	438
Mental disorders (other than mental retardation) .....	128,796	24,771	55,317	48,708	61,643	13,022	24,932	23,689	67,153	11,749	30,385	25,019
Mental retardation .....	17,005	4,132	4,694	8,179	10,692	2,590	3,152	4,950	6,313	1,542	1,542	3,229
Diseases of the—												
Nervous system and sense organs .....	51,758	6,644	17,273	27,841	26,286	3,272	8,108	14,906	25,472	3,372	9,165	12,935
Circulatory system .....	75,752	1,818	13,681	60,253	52,233	1,069	8,860	42,304	23,519	749	4,821	17,949
Respiratory system .....	27,422	627	4,456	22,339	14,619	233	2,021	12,365	12,803	394	2,435	9,974
Digestive system .....	14,122	977	6,332	6,813	8,641	441	3,996	4,204	5,481	536	2,336	2,609
Genitourinary system .....	14,441	2,049	5,199	7,193	8,767	1,196	3,127	4,444	5,674	853	2,072	2,749
Skin and subcutaneous tissue .....	1,343	190	523	630	524	66	206	252	819	124	317	378
Musculoskeletal system .....	152,931	6,374	42,490	104,067	77,458	3,116	22,102	52,240	75,473	3,258	20,388	51,827
Congenital anomalies .....	790	230	209	351	436	139	107	190	354	91	102	161
Injuries .....	25,885	4,100	8,947	12,838	17,343	3,020	6,148	8,175	8,542	1,080	2,799	4,663
Other .....	10,062	876	3,355	5,831	4,995	418	1,518	3,059	5,067	458	1,837	2,772
Percentage distribution												
Diagnosis available .....	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0
Infectious and parasitic diseases <sup>3</sup> .....	1.8	3.2	3.2	.9	2.5	4.4	4.8	1.0	1.0	1.8	1.4	.7
Neoplasms .....	10.9	6.0	9.6	12.4	10.5	5.8	8.6	12.1	11.5	6.4	10.7	12.8
Endocrine, nutritional, and metabolic diseases .....	3.0	2.1	2.7	3.3	2.9	1.7	2.6	3.2	3.2	2.6	2.8	3.5
Diseases of blood and blood-forming organs .....	.3	.8	.3	.3	.3	.7	.3	.2	.4	.8	.4	.3
Mental disorders (other than mental retardation) .....	20.8	41.2	28.7	13.3	18.2	39.8	24.8	11.6	23.8	42.9	32.9	15.4
Mental retardation .....	2.7	6.9	2.4	2.2	3.2	7.9	3.1	2.4	2.2	5.6	1.7	2.0
Diseases of the—												
Nervous system and sense organs .....	8.4	11.1	9.0	7.6	7.8	10.0	8.1	7.3	9.0	12.3	9.9	8.0
Circulatory system .....	12.2	3.0	7.1	16.4	15.4	3.3	8.8	20.7	8.3	2.7	5.2	11.1
Respiratory system .....	4.4	1.0	2.3	6.1	4.3	.7	2.0	6.0	4.5	1.4	2.6	6.1
Digestive system .....	2.3	1.6	3.3	1.9	2.6	1.3	4.0	2.1	1.9	2.0	2.5	1.6
Genitourinary system .....	2.3	3.4	2.7	2.0	2.6	3.7	3.1	2.2	2.0	3.1	2.2	1.7
Skin and subcutaneous tissue .....	.2	.3	.3	.2	.2	.2	.2	.1	.3	.5	.3	.2
Musculoskeletal system .....	24.7	10.6	22.0	28.4	22.9	9.5	22.0	25.5	26.8	11.9	22.1	31.9
Congenital anomalies .....	.1	.4	.1	.1	.1	.4	.1	.1	.1	.3	.1	.1
Injuries .....	4.2	6.8	4.6	3.5	5.1	9.2	6.1	4.0	3.0	3.9	3.0	2.9
Other .....	1.6	1.5	1.7	1.6	1.5	1.3	1.5	1.5	1.8	1.7	2.0	1.7

<sup>1</sup> Effective 1995, impairment data for disabled-worker awards are no longer based solely on cases medically allowed at the initial level.

<sup>2</sup> Classification based on impairment codes established by SSA.

<sup>3</sup> AIDS/HIV records are counted in the Infectious and Parasitic Diseases group. Before 1990, they were included in the Other group.

CONTACT: Terry Dodson (410) 965-0143 for further information.

## 6.C OASDI Benefits Awarded: Disabled Workers

Table 6.C7.—Number of applications, awards, and ratio of awards to applications and awards per 1,000 insured workers for selected years, 1960–2000

[Numbers in thousands]

Year	Number of applications	Number of awards	Awards as a percent of applications	Awards per 1,000 insured workers
1960.....	418.6	207.8	49.6	4.5
1965.....	529.3	253.5	47.9	4.7
1966.....	544.5	278.3	51.1	5.1
1967.....	573.2	301.4	52.6	5.4
1968.....	719.8	323.2	44.9	5.7
1969.....	725.2	344.7	47.5	4.9
1970.....	869.8	350.4	40.3	4.8
1971.....	923.9	415.9	45.0	5.6
1972.....	947.5	455.4	48.1	6.0
1973.....	1,067.5	491.6	46.1	6.3
1974.....	1,330.2	536.0	40.3	6.7
1975.....	1,285.3	592.0	46.1	7.1
1976.....	1,232.2	551.5	44.8	6.5
1977.....	1,235.2	568.9	46.1	6.5
1978.....	1,184.7	464.4	39.2	5.2
1979.....	1,187.8	416.7	35.1	4.4
1980.....	1,262.3	396.6	31.4	4.0
1981.....	1,161.2	351.8	30.3	3.4
1982.....	1,019.8	297.1	29.1	2.9
1983.....	1,019.3	311.5	30.6	3.0
1984.....	1,036.7	362.0	34.9	3.4
1985.....	1,066.2	377.4	35.4	3.5
1986.....	1,118.4	416.9	37.3	3.8
1987.....	1,108.9	415.8	37.5	3.7
1988.....	1,017.9	409.5	40.2	3.6
1989.....	984.9	425.6	43.2	3.7
1990.....	1,067.7	468.0	43.8	4.0
1991.....	1,208.7	536.4	44.4	4.5
1992.....	1,335.1	636.6	47.7	5.2
1993.....	1,425.8	635.2	44.6	5.2
1994.....	1,443.8	631.9	43.8	5.1
1995.....	1,338.1	645.8	48.3	5.1
1996.....	1,279.2	624.3	48.8	4.9
1997.....	1,180.2	587.4	49.8	4.5
1998.....	1,169.3	608.1	52.0	4.6
1999.....	1,200.1	620.5	51.7	4.6
2000.....	1,330.6	621.7	46.7	4.6

CONTACT: Jeff Kunkel (410) 965-3013 for further information.



6.D OASDI Benefits Awarded: Dependents & Survivors

Table 6.D1.—Number of wives and husbands, by type of benefit, 1950–2000

[Benefits not necessarily payable at time of award]

Year	Total	Wives entitled solely because of age	Wives entitled because of children in their care	Husbands
Wives and husbands of retired workers				
1950.....	162,768	152,310	9,646	812
1955.....	288,915	263,816	21,692	3,407
1960.....	339,987	305,713	32,254	2,020
1965.....	321,015	275,717	44,087	1,211
1970.....	339,447	286,867	51,378	1,202
1975.....	350,558	289,600	60,184	774
1976.....	346,623	287,455	58,440	728
1977.....	390,874	300,651	60,976	29,247
1978.....	346,956	277,330	53,072	16,554
1979.....	358,163	292,010	55,498	10,655
1980.....	360,693	294,892	55,401	10,400
1981.....	338,540	277,641	50,993	9,906
1982.....	349,967	302,739	36,229	10,999
1983.....	356,274	308,922	35,309	12,043
1984.....	342,691	298,855	30,972	12,864
1985.....	356,558	312,849	30,454	13,255
1986.....	358,115	315,427	28,925	13,763
1987.....	333,333	294,499	26,099	12,735
1988.....	316,929	281,760	23,045	12,124
1989.....	310,498	278,655	21,285	10,558
1990.....	308,980	277,238	21,395	10,347
1991.....	307,000	276,236	21,154	9,610
1992.....	304,764	274,670	21,057	9,037
1993.....	290,728	262,240	19,945	8,543
1994.....	275,025	248,430	18,431	8,164
1995.....	258,740	233,731	17,214	7,795
1996.....	244,014	221,059	15,466	7,489
1997.....	268,012	246,229	14,040	7,743
1998.....	263,668	242,390	13,472	7,806
1999.....	275,568	253,559	13,521	8,488
2000.....	341,503	315,148	15,625	10,730
Wives and husbands of disabled workers				
1958 <sup>1</sup> .....	12,920	5,035	7,869	16
1959 <sup>2</sup> .....	54,299	21,301	32,844	154
1960.....	54,187	15,756	38,326	105
1965.....	69,183	13,813	55,230	140
1970.....	96,304	21,227	74,913	164
1975.....	148,741	31,942	116,624	175
1976.....	147,407	36,600	110,626	181
1977.....	151,938	36,990	113,417	1,531
1978.....	130,161	35,335	93,293	1,533
1979.....	113,243	32,863	79,414	966
1980.....	108,500	32,616	74,922	962
1981.....	95,575	30,360	64,333	882
1982.....	77,835	31,540	45,463	832
1983.....	80,079	35,369	43,820	890
1984.....	81,834	34,470	46,433	931
1985.....	83,511	34,101	48,522	888
1986.....	82,435	33,797	47,711	927
1987.....	77,316	31,652	43,881	1,783
1988.....	73,790	29,634	41,627	2,529
1989.....	69,113	27,750	39,212	2,151
1990.....	69,667	27,023	40,458	2,186
1991.....	72,754	26,747	43,543	2,464
1992.....	78,083	27,502	47,841	2,740
1993.....	74,605	26,276	45,602	2,727
1994.....	69,549	24,240	42,824	2,485
1995.....	63,097	22,833	37,972	2,292
1996.....	57,528	21,775	33,638	2,115
1997.....	50,818	23,329	25,779	1,710
1998.....	47,550	22,693	23,190	1,667
1999.....	46,164	22,557	21,949	1,658
2000.....	43,941	22,399	19,801	1,741

<sup>1</sup> September–November.

<sup>2</sup> Includes December 1958.

**6.D OASDI Benefits Awarded: Dependents & Survivors**

Table 6.D3.—Number and average monthly benefit for **wives and husbands**, by age and sex, 2000

[Based on 1-percent sample]

Type of benefit and age in month of award	Total wives		Wives of—				Husbands	
			Retired workers		Disabled workers			
	Number	Average monthly benefit <sup>1</sup>	Number	Average monthly benefit <sup>1</sup>	Number	Average monthly benefit <sup>1</sup>	Number	Average monthly benefit <sup>1</sup>
Total .....	282,100	\$387.70	245,300	\$412.30	36,800	\$223.50	11,400	\$215.80
Entitlement based on care of children .....	30,100	252.00	14,600	340.00	15,500	169.10	1,000	122.10
Under 35 .....	5,900	142.20	700	312.30	5,200	119.40	(2)	...
35–39 .....	3,900	159.60	1,000	233.00	2,900	134.30	(2)	...
40–44 .....	5,300	233.90	2,100	288.90	3,200	197.90	(2)	...
45–49 .....	5,800	277.10	3,000	341.40	2,800	208.20	(2)	...
50–54 .....	3,900	366.90	3,200	388.30	700	269.00	(2)	...
55–59 .....	2,500	305.90	1,900	312.00	600	286.50	(2)	...
60–61 .....	2,200	417.20	2,100	420.80	100	(3)	(2)	...
62–64 .....	600	270.00	600	270.00	...	...	(2)	...
Entitlement based on age .....	252,000	403.90	230,700	416.90	21,300	263.00	10,400	224.80
62–64 .....	188,600	386.20	169,400	401.00	19,200	255.20	2,700	195.10
62 .....	132,200	374.60	115,400	391.10	16,800	261.40	(2)	...
63 .....	29,900	414.60	28,200	424.80	1,700	243.80	(2)	...
64 .....	26,500	411.90	25,800	419.50	700	132.90	(2)	...
65–69 .....	55,100	469.70	53,200	474.00	1,900	347.20	4,700	244.20
65 .....	32,200	463.30	31,200	465.90	(2)	...	(2)	...
66 .....	10,300	506.00	9,900	513.60	(2)	...	(2)	...
67 .....	5,200	459.30	5,200	459.30	(2)	...	(2)	...
68 .....	4,300	472.40	3,900	489.50	(2)	...	(2)	...
69 .....	3,100	428.60	3,000	432.80	(2)	...	(2)	...
70–74 .....	5,300	375.30	5,300	375.30	...	...	2,000	252.10
75 or older .....	3,000	361.40	2,800	371.60	200	(3)	1,000	159.60
Wives (nondivorced) .....	263,600	388.70	228,800	414.00	34,800	222.20	...	...
Divorced wives .....	18,500	373.20	16,500	388.70	2,000	244.90	...	...
Husbands of retired workers .....	...	...	...	...	...	...	9,700	229.50
Husbands of disabled workers .....	...	...	...	...	...	...	1,700	137.50

<sup>1</sup> Benefits awarded before the December increase are converted to the December rates before computation of the averages.

<sup>2</sup> Base figure too small to meet statistical standards for reliability of derived figure.

<sup>3</sup> Average benefit not shown for groups with fewer than 500 beneficiaries.

**6.D OASDI Benefits Awarded: Dependents & Survivors**
**Table 6.D4.—Number of children, by type of benefit, 1957–2000**

Year	Total	Children of—		
		Retired workers	Deceased workers	Disabled workers
Total				
1957.....	313,163	81,842	231,321	..
1960.....	415,719	69,979	241,430	104,310
1965.....	783,202	134,187	451,399	197,616
1970.....	1,090,865	182,595	591,724	316,546
1975.....	1,331,913	225,579	591,118	515,216
1976.....	1,327,197	236,805	578,905	511,487
1977.....	1,365,513	259,447	587,589	518,477
1978.....	1,234,658	214,284	566,992	453,382
1979.....	1,191,521	247,800	544,549	399,172
1980.....	1,174,112	248,658	540,246	385,208
1981.....	1,086,547	211,406	535,487	339,654
1982.....	916,715	182,849	473,396	260,470
1983.....	752,839	144,945	380,992	226,895
1984.....	721,564	131,986	351,326	238,252
1985.....	713,632	128,076	332,531	253,025
1986.....	700,627	122,652	319,800	258,167
1987.....	685,299	117,984	310,573	256,742
1988.....	706,031	116,659	324,346	265,026
1989.....	675,362	106,491	307,484	261,387
1990.....	695,307	108,105	303,616	283,586
1991.....	726,908	107,261	301,459	318,188
1992.....	794,571	108,686	304,300	381,585
1993.....	816,454	106,566	311,290	398,598
1994.....	824,239	102,983	310,051	411,205
1995.....	808,578	101,239	306,044	401,295
1996.....	798,485	98,655	302,480	397,350
1997.....	757,346	97,594	297,204	362,548
1998.....	763,170	96,893	294,851	371,426
1999.....	773,166	99,826	295,196	378,144
2000.....	776,676	115,358	297,686	363,632
Children under age 18				
1940.....	59,382	8,249	51,133	..
1945.....	127,514	7,215	120,299	..
1950.....	122,641	25,495	97,146	..
1955.....	238,795	40,402	198,393	..
1960.....	391,366	57,239	231,611	102,516
1965.....	523,453	84,707	263,637	175,109
1970.....	678,940	99,353	337,960	241,627
1975.....	806,770	115,347	300,139	391,284
1980.....	573,828	111,610	227,139	235,079
1981.....	512,939	84,793	228,317	199,829
1982.....	457,445	81,502	222,738	153,205
1983.....	444,467	80,117	211,396	152,954
1984.....	449,242	74,328	202,163	172,721
1985.....	464,908	74,128	200,576	190,204
1986.....	465,115	70,915	196,008	198,192
1987.....	451,370	66,672	184,668	195,030
1988.....	452,519	63,586	192,278	196,655
1989.....	446,308	59,073	189,285	197,950
1990.....	468,439	60,588	189,792	218,059
1991.....	502,442	60,618	191,537	250,287
1992.....	559,725	61,034	192,689	306,002
1993.....	575,247	59,515	198,469	317,263
1994.....	586,342	57,677	201,598	327,067
1995.....	571,650	57,215	198,848	315,587
1996.....	561,687	56,126	194,333	311,228
1997.....	517,118	54,841	184,237	278,040
1998.....	516,100	54,218	182,118	279,764
1999.....	522,946	57,019	182,159	283,768
2000.....	525,390	68,440	184,762	272,188

**6.D OASDI Benefits Awarded: Dependents & Survivors**

Table 6.D4.—Number of **children**, by type of benefit, 1957–2000—*Continued*

Year	Total	Children of—		
		Retired workers	Deceased workers	Disabled workers
Disabled children, aged 18 or older				
1957.....	29,507	17,249	12,258	...
1960.....	24,353	12,740	9,819	1,794
1965.....	21,398	10,017	8,668	2,713
1970.....	24,547	11,348	9,425	3,774
1975.....	32,707	14,636	11,182	6,889
1976.....	34,517	15,602	11,546	7,369
1977.....	36,210	(1)	(1)	7,885
1978.....	33,611	15,378	11,013	7,220
1979.....	33,419	15,967	10,999	6,453
1980.....	33,470	16,650	10,626	6,194
1981.....	30,545	15,365	9,745	5,435
1982.....	28,707	14,772	9,685	4,250
1983.....	33,639	17,309	11,223	5,107
1984.....	36,427	18,330	12,556	5,541
1985.....	39,083	19,661	12,709	6,713
1986.....	40,525	20,295	13,244	6,986
1987.....	39,665	20,761	12,117	6,787
1988.....	38,702	20,544	11,512	6,646
1989.....	37,001	19,668	10,975	6,358
1990.....	38,772	20,862	11,277	6,633
1991.....	41,086	21,850	11,684	7,552
1992.....	47,009	23,615	13,846	9,548
1993.....	47,246	23,173	13,819	10,254
1994.....	44,483	22,119	12,590	9,774
1995.....	43,275	21,566	11,930	9,779
1996.....	40,583	20,169	11,061	9,353
1997.....	38,701	19,611	10,616	8,474
1998.....	39,941	19,932	10,914	9,095
1999.....	41,748	20,467	11,430	9,851
2000.....	43,845	22,567	11,621	9,657
Students				
1965.....	238,351	39,463	179,094	19,794
1970.....	387,378	71,894	244,339	71,145
1975.....	492,436	95,596	279,797	117,043
1976.....	544,739	108,197	295,058	141,484
1977.....	574,760	(1)	(1)	148,227
1978.....	544,396	105,719	291,434	147,243
1979.....	553,889	117,118	292,766	144,005
1980.....	566,814	120,398	302,481	143,935
1981.....	543,063	111,248	297,425	134,390
1982.....	430,563	86,575	240,973	103,015
1983.....	274,726	47,519	158,373	68,834
1984.....	235,895	39,328	136,577	59,990
1985.....	209,641	34,287	119,246	56,108
1986.....	194,987	31,442	110,556	52,989
1987.....	194,264	30,551	108,788	54,925
1988.....	214,810	32,529	120,556	61,725
1989.....	192,053	27,750	107,224	57,079
1990.....	188,096	26,655	102,547	58,894
1991.....	183,380	24,793	98,238	60,349
1992.....	187,837	24,037	97,765	66,035
1993.....	193,961	23,878	99,002	71,081
1994.....	193,414	23,187	95,863	74,364
1995.....	193,653	22,458	95,266	75,929
1996.....	196,215	22,360	97,086	76,769
1997.....	201,527	23,142	102,351	76,034
1998.....	207,129	22,743	101,819	82,567
1999.....	208,472	22,340	101,607	84,525
2000.....	207,441	24,351	101,303	81,787

<sup>1</sup> Data not available.

CONTACT: Joseph Bondar/Diane Wallace (410) 965-0162/0165 for further information.

**6.D OASDI Benefits Awarded: Dependents & Survivors**

Table 6.D5.—Number and average monthly benefit for **children**, by type of benefit and age, 2000

[Based on 1-percent sample]

Type of benefit and age in month of award	Total number	Children of—					
		Retired workers		Deceased workers		Disabled workers	
		Number	Average monthly benefit <sup>1</sup>	Number	Average monthly benefit <sup>1</sup>	Number	Average monthly benefit <sup>1</sup>
Total .....	737,100	111,300	\$373.00	281,500	\$560.50	344,300	\$219.50
Children under age 18 .....	509,800	68,600	354.70	177,800	533.10	263,400	192.50
Under 1 .....	21,600	1,000	382.60	4,600	501.30	16,000	170.70
1 .....	13,500	500	395.40	4,700	515.70	8,300	142.90
2 .....	14,700	1,200	301.30	4,300	413.10	9,200	169.50
3 .....	17,200	1,200	335.80	7,100	536.40	8,900	179.30
4 .....	20,000	1,500	307.30	7,400	490.60	11,100	155.70
5 .....	18,900	1,500	283.20	7,000	529.60	10,400	167.10
6 .....	23,500	1,900	311.50	9,000	541.90	12,600	200.80
7 .....	24,400	2,200	378.40	8,800	508.00	13,400	164.10
8 .....	24,600	2,500	280.00	10,000	495.40	12,100	159.70
9 .....	30,400	2,900	332.10	12,400	493.50	15,100	160.20
10 .....	27,500	4,100	315.80	9,600	539.10	13,800	205.50
11 .....	36,200	5,500	362.90	12,800	517.10	17,900	175.60
12 .....	35,300	5,200	360.70	13,400	515.20	16,700	174.50
13 .....	33,400	6,300	331.30	11,000	550.60	16,100	193.40
14 .....	37,600	5,600	351.60	12,600	585.50	19,400	223.60
15 .....	41,700	6,800	352.70	13,900	576.70	21,000	228.00
16 .....	45,900	8,500	405.40	14,900	575.60	22,500	241.60
17 .....	43,400	10,200	387.00	14,300	558.10	18,900	238.50
Disabled children, aged 18 or older.....	37,500	21,100	371.40	9,400	540.70	7,000	250.50
Under 20 .....	2,400	600	423.30	800	409.90	1,000	135.10
20–24 .....	8,100	2,900	353.10	2,700	578.10	2,500	279.50
25–29 .....	5,900	3,000	294.80	1,600	594.80	1,300	232.70
30–34 .....	6,800	4,400	416.50	1,100	546.30	1,300	240.00
35–39 .....	7,400	5,500	380.50	1,100	537.10	800	335.40
40 or older.....	6,900	4,700	372.10	2,100	500.30	100	(2)
Students, aged 18–19.....	189,800	21,600	432.80	94,300	614.10	73,900	313.10
18 .....	188,400	21,300	438.40	94,000	614.10	73,100	314.40
19 .....	1,400	300	(2)	300	(2)	800	192.00

<sup>1</sup> Benefits awarded before the December increase are converted to the December rates before computation of the averages.

<sup>2</sup> Average benefit not shown for groups with fewer than 500 beneficiaries.

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

Table 6.D6.—Number of **mothers and fathers**, by type of benefit, 1950–2000

Year	Total	Mothers	Fathers	Widowed			Surviving divorced mothers and fathers
				Total	With at least 1 child under age 16 <sup>1</sup>	Entitled solely because of at least 1 disabled child <sup>2</sup>	
1950.....	41,101	41,101	...	41,089	41,089	...	12
1951.....	78,323	78,323	...	78,181	78,181	...	142
1952.....	64,875	64,875	...	64,776	64,776	...	99
1953.....	71,945	71,945	...	71,861	71,861	...	84
1954.....	70,775	70,775	...	70,699	70,699	...	76
1955.....	76,018	76,018	...	75,927	75,927	...	91
1956.....	67,475	67,475	...	67,410	67,410	...	65
1957.....	88,174	88,174	...	88,102	86,088	2,014	72
1958 <sup>3</sup> .....	81,467	81,467	...	81,392	80,130	1,262	75
1959 <sup>4</sup> .....	102,020	102,020	...	101,933	100,234	1,699	87
1960.....	92,607	92,607	...	92,507	90,939	1,568	100
1961.....	98,449	98,449	...	98,374	96,778	1,596	75
1962.....	99,925	99,925	...	99,835	98,099	1,736	90
1963.....	104,960	104,960	...	104,866	102,828	2,038	94
1964.....	106,249	106,249	...	106,137	103,778	2,359	112
1965.....	100,005	100,005	...	99,804	97,972	1,832	201
1966.....	107,135	107,135	...	106,677	105,270	1,407	458
1967.....	110,762	110,762	...	110,283	108,842	1,441	479
1968.....	113,765	113,765	...	113,323	111,869	1,454	442
1969.....	116,922	116,922	...	116,434	115,035	1,399	488
1970.....	112,377	112,377	...	111,887	110,459	1,428	490
1971.....	116,548	116,548	...	115,996	114,266	1,730	552
1972.....	117,699	117,699	...	117,034	113,822	3,212	665
1973.....	118,775	118,775	...	112,511	109,574	2,937	6,264
1974.....	109,221	109,221	...	102,584	99,705	2,879	6,637
1975.....	116,224	111,372	4,852	108,002	103,597	4,405	8,222
1976.....	113,520	107,339	6,181	105,158	99,781	5,377	8,362
1977.....	118,821	111,473	7,348	109,050	103,492	5,558	9,771
1978.....	110,015	103,391	6,624	100,247	96,834	3,413	9,768
1979.....	110,424	103,805	6,619	99,413	96,249	3,164	11,011
1980.....	107,809	99,922	7,887	96,005	92,768	3,237	11,804
1981.....	99,653	92,138	7,515	81,079	78,069	3,010	11,059
1982.....	86,786	80,198	6,588	70,019	67,301	2,718	10,179
1983.....	82,464	76,271	6,193	66,711	63,304	3,407	9,560
1984.....	73,794	68,164	5,630	59,256	54,962	4,294	8,908
1985.....	72,241	66,992	5,249	62,881	58,507	4,374	9,360
1986.....	69,340	64,147	5,193	60,200	55,639	4,561	9,140
1987.....	64,777	59,626	5,151	56,329	52,051	4,278	8,448
1988.....	62,676	57,859	4,817	54,833	50,655	4,178	7,843
1989.....	59,525	54,916	4,609	51,992	48,226	3,766	7,533
1990.....	58,060	53,346	4,714	50,879	47,673	3,206	7,181
1991.....	57,896	52,889	5,007	50,787	47,695	3,092	7,109
1992.....	56,402	51,273	5,129	49,341	46,302	3,039	7,061
1993.....	56,408	51,358	5,050	49,465	46,420	3,045	6,943
1994.....	54,732	49,825	4,907	48,217	45,346	2,871	6,515
1995.....	51,645	46,874	4,771	45,368	42,817	2,551	6,277
1996.....	49,150	44,732	4,418	43,538	41,192	2,346	5,612
1997.....	43,504	39,805	3,699	38,565	36,396	2,169	4,939
1998.....	42,395	38,533	3,862	37,739	35,577	2,162	4,656
1999.....	41,756	37,926	3,830	37,271	35,092	2,179	4,485
2000.....	40,491	36,521	3,970	36,197	34,241	1,956	4,294

<sup>1</sup> Prior to August 1981, benefits were payable to mothers and fathers caring for a child under age 18. For mothers and fathers caring for a child who was at least age 14 and who were entitled in August 1981, benefits were continued until the child attained age 18 or September 1983, whichever came earlier.

<sup>2</sup> Excludes mothers and fathers who had both disabled and nondisabled entitled children in their care.

<sup>3</sup> January—November.

<sup>4</sup> Includes December 1958.

## 6.D OASDI Benefits Awarded: Dependents &amp; Survivors

Table 6.D7.—Number and average monthly benefit for **widows and widowers**, by age and sex, 2000

[Based on 1-percent sample]

Type of benefit, age in month of award, and sex	Nondisabled				Disabled widows and widowers		Widowed mothers and fathers	
	Widows		Widowers		Number	Average monthly benefit <sup>1</sup>	Number	Average monthly benefit <sup>1</sup>
	Number	Average monthly benefit <sup>1</sup>	Number	Average monthly benefit <sup>1</sup>				
Total .....	318,200	\$866.60	15,600	\$530.60	27,700	\$516.40	37,300	\$588.70
Under 25 .....	...	...	...	...	...	...	800	425.50
25–29 .....	...	...	...	...	...	...	2,500	545.70
30–34 .....	...	...	...	...	...	...	5,300	498.70
35–39 .....	...	...	...	...	...	...	8,200	542.40
40–44 .....	...	...	...	...	...	...	8,900	645.80
45–49 .....	...	...	...	...	...	...	6,400	632.70
50–54 .....	...	...	...	...	9,000	512.30	3,400	681.40
55–59 .....	...	...	...	...	16,400	517.70	1,200	575.90
60–64 .....	134,800	797.30	9,900	564.00	2,100	545.20	600	595.50
60 .....	68,300	771.10	3,800	503.10	1,400	585.30	(2)	...
61 .....	23,100	788.20	2,700	551.00	300	(3)	(2)	...
62 .....	16,800	812.50	2,300	722.10	200	(3)	(2)	...
63 .....	11,700	804.80	700	481.00	200	(3)	(2)	...
64 .....	14,900	908.50	400	(3)	...	...	(2)	...
65–69 .....	59,300	862.50	1,000	758.40	200	(3)	...	...
65 .....	32,800	821.90	(2)	...	...	...	...	...
66 .....	6,500	888.20	(2)	...	...	...	...	...
67 .....	6,300	940.40	(2)	...	...	...	...	...
68 .....	7,600	929.00	(2)	...	...	...	...	...
69 .....	6,100	890.20	(2)	...	...	...	...	...
70–74 .....	36,200	902.10	900	416.10	...	...	...	...
70 .....	7,200	894.00	(2)	...	...	...	...	...
71 .....	7,100	913.40	(2)	...	...	...	...	...
72 .....	7,300	917.60	(2)	...	...	...	...	...
73 .....	7,200	877.00	(2)	...	...	...	...	...
74 .....	7,400	908.00	(2)	...	...	...	...	...
75–79 .....	39,900	904.30	1,200	386.60	...	...	...	...
75 .....	8,300	870.80	(2)	...	...	...	...	...
76 .....	8,300	929.50	(2)	...	...	...	...	...
77 .....	7,700	934.70	(2)	...	...	...	...	...
78 .....	8,200	901.10	(2)	...	...	...	...	...
79 .....	7,400	885.20	(2)	...	...	...	...	...
80 or older .....	48,000	1,008.50	2,600	422.10	...	...	...	...
Men .....	...	...	...	...	900	389.50	2,800	488.60
Women .....	...	...	...	...	26,800	520.60	34,500	596.80
Widow or mother .....	285,100	870.50	...	...	22,800	519.60	31,600	587.80
Surviving divorced wife or mother .....	33,100	833.50	...	...	4,000	526.80	2,900	695.00

<sup>1</sup> Benefits awarded before the December increase are converted to the December rates before computation of the averages.<sup>2</sup> Base figure too small to meet statistical standards for reliability of derived figure.<sup>3</sup> Average benefit not shown for groups with fewer than 500 beneficiaries.

CONTACT: Joseph Bondar/Diane Wallace (410) 965-0162/0165 for further information.

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

Table 6.D8.—Number of **widows and widowers**, by type of benefit, 1950–2000

Year	Total	Entitled because of age		Entitled because of disability	
		Widows	Widowers	Widows	Widowers
1950.....	66,735	66,672	63	...	...
1951.....	89,591	89,324	267	...	...
1952.....	92,302	91,992	310	...	...
1953.....	112,866	112,467	399	...	...
1954.....	128,026	127,626	400	...	...
1955.....	140,624	140,273	351	...	...
1956.....	253,524	253,191	333	...	...
1957.....	244,633	244,172	461	...	...
1958 <sup>1</sup> .....	199,320	198,948	372	...	...
1959 <sup>2</sup> .....	252,683	252,100	583	...	...
1960.....	239,267	238,813	454	...	...
1961.....	251,275	250,606	669	...	...
1962.....	267,051	266,465	586	...	...
1963.....	278,709	278,138	571	...	...
1964.....	283,263	282,689	574	...	...
1965.....	359,431	358,875	556	...	...
1966.....	403,595	403,035	560	...	...
1967.....	355,589	355,032	557	...	...
1968.....	375,391	352,280	604	22,438	69
1969.....	375,753	353,928	625	21,127	73
1970.....	363,216	347,031	576	15,546	63
1971.....	381,262	363,689	551	16,960	62
1972.....	402,809	382,452	544	19,739	74
1973.....	372,167	351,793	651	19,660	63
1974.....	363,693	343,317	550	19,793	33
1975.....	377,246	353,249	476	23,476	45
1976.....	385,373	362,229	489	22,603	52
1977.....	416,735	383,057	10,416	22,981	281
1978.....	403,679	375,750	9,022	18,553	354
1979.....	445,555	418,883	9,272	17,136	264
1980.....	452,156	424,690	11,412	15,789	265
1981.....	480,772	453,307	13,311	13,868	286
1982.....	492,451	465,070	14,941	12,222	218
1983.....	501,688	470,764	16,512	14,144	268
1984.....	499,677	464,979	17,533	16,847	318
1985.....	501,673	467,197	17,390	16,759	327
1986.....	491,052	454,903	17,731	18,033	385
1987.....	475,035	440,803	17,836	16,062	334
1988.....	457,574	424,107	18,139	14,979	349
1989.....	449,139	416,154	17,817	14,830	338
1990.....	451,862	417,925	18,513	15,058	366
1991.....	468,788	420,190	19,008	28,951	639
1992.....	472,078	419,413	19,430	32,477	758
1993.....	466,198	414,941	19,422	31,036	799
1994.....	459,340	410,323	19,114	29,075	828
1995.....	444,899	396,725	18,577	28,762	835
1996.....	438,081	390,962	18,508	27,783	828
1997.....	440,076	393,014	18,516	27,691	855
1998.....	443,669	395,231	19,039	28,494	905
1999.....	469,806	419,205	20,951	28,654	996
2000.....	505,021	453,334	23,645	26,997	1,045

<sup>1</sup> January–November.  
<sup>2</sup> Includes December 1958.

Table 6.D9.—Number and average amount of lump-sum death payment awards, 1940–2000

Year	Number of—		Average lump sum per worker
	Deceased workers	Lump-sum payments	
1940.....	61,080	75,095	\$145.79
1941.....	90,941	117,303	144.58
1942.....	103,322	134,991	144.77
1943.....	122,185	163,011	145.66
1944.....	151,869	205,117	145.68
1945.....	178,813	247,012	146.05
1946.....	179,588	250,706	151.74
1947.....	181,992	218,787	162.16
1948.....	200,090	213,096	161.50
1949.....	202,154	212,614	164.02
1950.....	200,411	209,960	147.81
1951.....	414,470	431,229	138.24
1952.....	437,896	456,531	178.20
1953.....	511,986	532,846	174.16
1954.....	516,158	536,341	207.86
1955.....	566,830	589,612	202.72
1956.....	546,984	572,291	200.80
1957.....	689,282	718,672	201.63
1958 <sup>1</sup> .....	656,825	683,964	202.52
1959 <sup>2</sup> .....	822,413	855,032	212.67
1960.....	778,660	809,194	211.55
1961.....	813,464	843,308	210.46
1962.....	865,217	892,261	212.02
1963.....	968,651	1,015,536	212.61
1964.....	1,011,414	1,073,044	213.94
1965.....	989,848	1,046,874	226.01
1966.....	1,060,335	1,138,317	224.00
1967.....	1,133,787	1,217,980	222.51
1968.....	1,158,666	1,216,910	236.30
1969.....	1,253,467	1,295,897	232.60
1970.....	1,220,248	1,257,687	243.90
1971.....	1,251,831	1,283,924	244.20
1972.....	1,290,133	1,320,637	247.90
1973.....	1,299,223	1,325,833	253.10
1974.....	1,285,221	1,307,890	254.64
1975.....	1,334,914	1,344,095	252.47
1976.....	1,321,516	1,328,008	251.60
1977.....	1,227,390	1,240,304	254.17
1978.....	1,437,275	1,451,140	254.65
1979.....	1,500,944	1,515,614	254.68
1980.....	1,552,617	1,566,330	254.70
1981.....	1,305,261	1,321,565	254.72
1982.....	797,096	808,041	255.00
1983.....	805,524	807,537	255.00
1984.....	825,494	831,761	255.00
1985.....	823,053	825,395	255.00
1986.....	809,487	811,946	255.00
1987.....	810,066	812,814	255.00
1988.....	839,802	842,037	255.00
1989.....	829,682	831,825	255.00
1990.....	830,799	832,900	255.00
1991.....	847,838	850,100	255.00
1992.....	855,073	857,614	255.00
1993.....	860,861	863,492	255.00
1994.....	852,289	855,278	255.00
1995.....	<sup>3</sup> 835,360	<sup>3</sup> 838,015	255.00
1996.....	832,304	835,277	255.00
1997.....	825,176	828,072	255.00
1998.....	833,770	836,468	255.00
1999.....	873,890	876,878	255.00
2000.....	933,767	937,159	255.00

<sup>1</sup> January–November.  
<sup>2</sup> Includes December 1958.  
<sup>3</sup> Revised data.

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Table 6.E1.—Number and percentage distribution of **retired workers** with benefits withheld, by monthly benefit, reduction for early retirement, and sex, December 2000

[Based on 10-percent sample]

Monthly benefit and sex	Total		Without reduction for early retirement		With reduction for early retirement	
	Number	Percent	Number	Percent	Number	Percent
Total .....	117,120	100.0	34,980	100.0	82,140	100.0
Less than \$350.00 .....	18,690	16.0	7,250	20.7	11,440	13.9
\$350.00–\$399.90 .....	3,480	3.0	1,350	3.9	2,130	2.6
\$400.00–\$449.90 .....	3,430	2.9	1,310	3.7	2,120	2.6
\$450.00–\$499.90 .....	5,710	4.9	2,330	6.7	3,380	4.1
\$500.00–\$549.90 .....	5,900	5.0	1,950	5.6	3,950	4.8
\$550.00–\$599.90 .....	5,500	4.7	1,540	4.4	3,960	4.8
\$600.00–\$649.90 .....	5,110	4.4	1,550	4.4	3,560	4.3
\$650.00–\$699.90 .....	5,210	4.4	1,550	4.4	3,660	4.5
\$700.00–\$749.90 .....	4,800	4.1	1,360	3.9	3,440	4.2
\$750.00–\$799.90 .....	4,160	3.6	1,060	3.0	3,100	3.8
\$800.00–\$849.90 .....	4,370	3.7	1,110	3.2	3,260	4.0
\$850.00–\$899.90 .....	4,140	3.5	1,240	3.5	2,900	3.5
\$900.00–\$949.90 .....	3,490	3.0	860	2.5	2,630	3.2
\$950.00–\$999.90 .....	3,290	2.8	990	2.8	2,300	2.8
\$1,000.00–\$1,049.90 .....	3,160	2.7	800	2.3	2,360	2.9
\$1,050.00–\$1,099.90 .....	3,200	2.7	810	2.3	2,390	2.9
\$1,100.00–\$1,149.90 .....	3,090	2.6	690	2.0	2,400	2.9
\$1,150.00–\$1,199.90 .....	2,900	2.5	560	1.6	2,340	2.8
\$1,200.00–\$1,249.90 .....	3,290	2.8	820	2.3	2,470	3.0
\$1,200.00–\$1,299.90 .....	3,950	3.4	1,100	3.1	2,850	3.5
\$1,300.00 or more.....	20,250	17.3	4,750	13.6	15,500	18.9
Men .....	74,990	100.0	24,590	100.0	50,400	100.0
Less than \$350.00 .....	9,680	12.9	4,310	17.5	5,370	10.7
\$350.00–\$399.90 .....	2,140	2.9	1,070	4.4	1,070	2.1
\$400.00–\$449.90 .....	2,120	2.8	1,010	4.1	1,110	2.2
\$450.00–\$499.90 .....	3,340	4.5	1,710	7.0	1,630	3.2
\$500.00–\$549.90 .....	2,850	3.8	1,280	5.2	1,570	3.1
\$550.00–\$599.90 .....	2,400	3.2	950	3.9	1,450	2.9
\$600.00–\$649.90 .....	2,550	3.4	1,040	4.2	1,510	3.0
\$650.00–\$699.90 .....	2,430	3.2	970	3.9	1,460	2.9
\$700.00–\$749.90 .....	2,300	3.1	850	3.5	1,450	2.9
\$750.00–\$799.90 .....	2,280	3.0	760	3.1	1,520	3.0
\$800.00–\$849.90 .....	2,130	2.8	630	2.6	1,500	3.0
\$850.00–\$899.90 .....	2,510	3.3	910	3.7	1,600	3.2
\$900.00–\$949.90 .....	2,200	2.9	560	2.3	1,640	3.3
\$950.00–\$999.90 .....	2,140	2.9	620	2.5	1,520	3.0
\$1,000.00–\$1,049.90 .....	2,130	2.8	570	2.3	1,560	3.1
\$1,050.00–\$1,099.90 .....	2,390	3.2	610	2.5	1,780	3.5
\$1,100.00–\$1,149.90 .....	2,400	3.2	500	2.0	1,900	3.8
\$1,150.00–\$1,199.90 .....	2,320	3.1	390	1.6	1,930	3.8
\$1,200.00–\$1,249.90 .....	2,680	3.6	650	2.6	2,030	4.0
\$1,200.00–\$1,299.90 .....	3,440	4.6	920	3.7	2,520	5.0
\$1,300.00 or more.....	18,560	24.7	4,280	17.4	14,280	28.3
Women .....	42,130	100.0	10,390	100.0	31,740	100.0
Less than \$350.00 .....	9,010	21.4	2,940	28.3	6,070	19.1
\$350.00–\$399.90 .....	1,340	3.2	280	2.7	1,060	3.3
\$400.00–\$449.90 .....	1,310	3.1	300	2.9	1,010	3.2
\$450.00–\$499.90 .....	2,370	5.6	620	6.0	1,750	5.5
\$500.00–\$549.90 .....	3,050	7.2	670	6.4	2,380	7.5
\$550.00–\$599.90 .....	3,100	7.4	590	5.7	2,510	7.9
\$600.00–\$649.90 .....	2,560	6.1	510	4.9	2,050	6.5
\$650.00–\$699.90 .....	2,780	6.6	580	5.6	2,200	6.9
\$700.00–\$749.90 .....	2,500	5.9	510	4.9	1,990	6.3
\$750.00–\$799.90 .....	1,880	4.5	300	2.9	1,580	5.0
\$800.00–\$849.90 .....	2,240	5.3	480	4.6	1,760	5.5
\$850.00–\$899.90 .....	1,630	3.9	330	3.2	1,300	4.1
\$900.00–\$949.90 .....	1,290	3.1	300	2.9	990	3.1
\$950.00–\$999.90 .....	1,150	2.7	370	3.6	780	2.5
\$1,000.00–\$1,049.90 .....	1,030	2.4	230	2.2	800	2.5
\$1,050.00–\$1,099.90 .....	810	1.9	200	1.9	610	1.9
\$1,100.00–\$1,149.90 .....	690	1.6	190	1.8	500	1.6
\$1,150.00–\$1,199.90 .....	580	1.4	170	1.6	410	1.3
\$1,200.00–\$1,249.90 .....	610	1.4	170	1.6	440	1.4
\$1,200.00–\$1,299.90 .....	510	1.2	180	1.7	330	1.0
\$1,300.00 or more.....	1,690	4.0	470	4.5	1,220	3.8

CONTACT: Dana Nichele Mercer/Robert L. Hackendorf (410) 966-6637/965-5536 for further information.

## 6.E OASDI: Benefits Withheld

Table 6.E4.—Number of **beneficiaries**, with benefits withheld, by reason for withholding payment, type of benefit, and age, December 2000

Reason payment withheld	Total	Retired workers			Disabled workers	Wives and husbands				Children	Widowed mothers and fathers	Widows and widowers	Par-ents	Special age-72 benefi-ciaries
		Total	Men	Women		Total	Wives		Hus-bands					
							Without children <sup>1</sup>	With chil-dren <sup>2</sup>						
Total .....	1,608,582	115,809	73,704	42,105	100,761	276,192	137,738	67,267	71,187	471,272	69,569	564,989	524	9,466
Earnings of retired workers.....	51,109	47,506	28,503	19,003	...	2,305	1,979	234	92	1,298	...	...	...	...
Earnings of other beneficiaries.....	100,684	...	...	...	...	45,172	1,060	41,645	2,467	267	45,083	10,162	...	...
Entitled child not in care of beneficiary.....	30,252	...	...	...	...	14,016	118	12,812	1,086	...	16,236	...	...	...
Payee not determined.....	9,716	830	426	404	1,553	46	30	16	...	6,952	17	318	...	...
Recoupment of overpayment .....	30,562	10,203	5,724	4,479	4,622	2,654	1,462	1,133	59	9,143	1,495	2,445	...	...
Address unknown .....	46,989	19,575	11,570	8,005	8,063	1,641	1,066	446	129	10,457	259	6,567	32	395
Determination of continuing disability pending .....	9,587	...	...	...	5,984	303	...	303	...	3,277	...	23	...	...
Workers' compensation offset.....	7,142	...	...	...	1,786	537	42	495	...	4,819	...	...	...	...
Government pension offset.....	250,189	...	...	...	...	168,470	104,246	...	64,224	...	73	78,187	...	3,459
Receipt of public assistance .....	3,847	...	...	...	...	...	...	...	...	...	...	...	...	3,847
Technical entitlement .....	838,421	...	...	...	...	25,066	16,757	6,494	1,815	356,504	1,476	455,225	106	44
Other reasons .....	230,084	37,695	27,481	10,214	78,753	15,982	10,978	3,689	1,315	78,555	4,930	12,062	386	1,721

<sup>1</sup> Aged 62 or older.

<sup>2</sup> Under age 65 with entitled children in their care.

Note: Due to the elimination of the earnings test for beneficiaries aged 65 or older in 2000, these beneficiaries are not included in table 6.E4.

Table 6.E5.—Number of **wives, husbands, and children**, with benefits withheld, by reason for withholding payment and type of benefit, December 2000

Reason payment withheld	Wives and husbands of—		Children								
	Retired workers	Disabled workers	Under age 18 of—			Disabled, aged 18 or older of—			Students, aged 18–19 of—		
			Retired workers	Deceased workers	Disabled workers	Retired workers	Deceased workers	Disabled workers	Retired workers	Deceased workers	Disabled workers
Total .....	212,572	63,620	24,052	61,184	197,667	81,755	53,342	16,991	5,965	19,490	10,826
Earnings of—											
Retired workers.....	2,305	...	1,055	...	...	197	...	...	46	...	...
Other beneficiaries.....	8,259	36,913	27	57	96	19	15	...	11	21	21
Entitled child not in care of beneficiary.....	2,500	11,516	...	...	...	...	...	...	...	...	...
Payee not determined.....	30	16	321	3,002	2,517	148	844	92	...	12	16
Recoupment of overpayment for reasons other than earnings .....	1,596	1,058	445	2,012	6,118	109	243	86	10	68	52
Address unknown .....	1,184	457	498	2,536	5,065	315	1,433	227	31	236	116
Determination of continuing disability pending.....	...	303	...	...	2,582	99	403	168	...	...	25
Workers' compensation offset.....	...	537	...	...	4,690	...	...	69	...	...	60
Government pension offset.....	166,906	1,564	...	...	...	...	...	...	...	...	...
Technical entitlement .....	17,002	8,064	17,682	39,092	146,356	78,348	42,207	13,067	4,230	10,553	4,969
Other reasons .....	12,790	3,192	4,024	14,485	30,243	2,520	8,197	3,282	1,637	8,600	5,567

CONTACT: Dana Nichele Mercer/Robert L. Hackendorf (410) 966-6377/965-5536 for further information.

Table 6.F1.—Number of benefits terminated, by type, 1940–2000

Year	Total	Retired workers	Disabled workers	Wives and husbands	Children				Widowed mothers and fathers	Widows and widowers	Parents	Special age-72
					Total	Under age 18	Disabled, aged 18 or older	Students				
Total.....	127,171,930	44,040,383	13,372,715	16,420,059	36,181,467	22,729,112	650,798	12,801,557	4,376,440	11,441,703	106,698	1,232,465
1940–1944.....	246,534	84,737	...	40,811	73,394	73,394	...	...	40,868	5,680	1,044	...
1945–1949.....	896,041	304,902	...	154,261	250,835	250,835	...	...	145,998	36,144	3,901	...
1950.....	266,615	98,280	...	51,200	69,062	69,062	...	...	33,313	13,642	1,118	...
1951.....	354,282	141,665	...	73,706	82,516	82,516	...	...	37,016	17,999	1,380	...
1952.....	383,780	160,284	...	85,349	75,352	75,352	...	...	40,085	20,978	1,732	...
1953.....	455,652	193,688	...	99,409	89,292	89,292	...	...	44,331	27,006	1,926	...
1954.....	501,694	212,894	...	111,788	99,375	99,375	...	...	45,870	29,871	1,896	...
1955.....	579,229	247,998	...	125,880	117,443	117,443	...	...	49,330	36,488	2,090	...
1956.....	624,981	269,006	...	134,700	128,391	128,391	...	...	51,874	38,849	2,161	...
1957.....	789,331	334,710	16,131	178,464	146,828	146,540	288	...	54,715	56,022	2,461	...
1958.....	817,512	322,279	52,949	173,608	156,944	156,348	596	...	52,088	57,422	2,222	...
1959.....	1,163,018	458,175	81,982	255,169	211,711	209,948	1,763	...	67,346	85,401	3,234	...
1960.....	1,170,612	440,555	89,090	249,792	235,965	233,512	2,453	...	67,555	84,396	3,259	...
1961.....	1,327,950	471,552	115,546	276,437	290,895	287,599	3,296	...	77,778	92,322	3,420	...
1962.....	1,410,718	507,807	128,299	282,569	311,045	307,200	3,845	...	78,261	99,332	3,405	...
1963.....	1,672,045	591,951	137,850	330,576	397,764	392,606	5,158	...	92,246	117,743	3,915	...
1964.....	1,739,693	616,124	138,576	333,969	424,680	418,834	5,846	...	96,116	126,328	3,900	...
1965.....	1,868,804	646,734	156,648	345,229	481,215	448,344	6,628	26,243	98,058	137,031	3,889	...
1966.....	2,178,105	696,038	168,630	351,877	704,131	457,688	7,329	239,114	92,054	158,302	3,749	3,324
1967.....	2,545,076	748,184	208,899	373,803	820,610	503,110	9,178	308,322	102,004	172,411	3,789	115,376
1968.....	2,654,191	789,586	222,197	386,245	837,390	514,363	10,620	312,407	100,344	188,844	4,004	125,581
1969.....	2,860,287	827,151	251,269	399,689	946,481	564,725	11,922	369,834	107,119	205,188	3,525	119,865
1970.....	2,841,523	817,129	260,444	388,574	956,566	582,918	11,795	361,853	102,578	208,843	3,313	104,076
1971.....	2,944,134	846,103	266,471	394,422	1,011,381	607,138	11,621	392,622	104,577	223,988	3,162	94,030
1972.....	2,949,327	839,018	261,739	384,297	1,037,251	605,569	13,924	417,758	108,995	232,375	2,950	82,702
1973.....	3,132,957	873,593	304,792	396,828	1,137,641	637,851	12,445	487,345	103,056	234,039	2,955	80,053
1974.....	3,296,247	921,897	320,958	416,891	1,205,329	699,400	15,288	490,641	116,061	243,139	2,886	69,086
1975.....	3,313,151	931,953	329,532	421,973	1,209,574	695,082	15,195	499,297	110,493	249,274	2,574	57,778
1976.....	3,405,273	941,162	351,504	424,417	1,262,306	711,425	16,104	534,777	114,823	256,020	2,412	52,629
1977.....	3,551,125	955,114	401,334	430,431	1,331,923	740,822	17,060	574,041	114,605	265,721	2,285	49,712
1978.....	3,589,849	977,703	413,571	428,498	1,342,365	736,536	17,496	588,333	112,491	271,102	2,106	42,013
1979.....	3,568,400	953,520	422,503	426,014	1,346,176	726,910	18,598	600,668	111,604	272,422	1,831	34,330
1980.....	3,538,615	1,009,542	408,051	420,313	1,259,831	636,825	14,561	608,445	118,300	289,326	1,705	31,547
1981.....	3,596,613	1,006,756	434,187	419,331	1,305,554	664,436	15,482	625,636	111,025	291,081	1,649	27,030
1982.....	3,869,989	1,032,327	483,847	437,104	1,485,066	677,326	16,435	791,305	109,210	298,435	1,521	22,479
1983.....	3,788,835	1,068,963	453,621	492,524	1,223,789	584,312	19,706	619,771	214,361	309,168	1,448	24,961
1984.....	3,230,134	1,102,737	371,913	373,796	954,150	498,199	19,277	436,674	88,342	319,858	1,283	18,055
1985.....	3,109,569	1,150,236	339,984	367,257	820,641	446,106	17,022	357,513	84,165	331,090	1,228	14,968
1986.....	2,996,494	1,152,844	341,276	362,966	703,293	474,999	17,013	211,281	90,071	329,855	1,110	15,079
1987.....	2,967,965	1,163,655	347,948	354,240	681,275	457,523	17,056	206,696	80,131	328,008	1,041	11,667
1988.....	3,087,126	1,227,357	356,143	354,250	723,385	484,001	19,478	219,906	73,473	341,432	922	10,164
1989.....	2,977,413	1,202,430	351,402	339,550	678,094	454,048	19,726	204,320	66,527	332,040	856	6,514
1990.....	2,958,646	1,222,810	348,194	337,006	646,343	415,616	20,014	210,713	64,260	334,293	769	4,971
1991.....	2,943,272	1,237,517	351,303	332,892	619,977	401,092	17,723	201,162	61,383	335,740	646	3,814
1992.....	2,969,109	1,252,171	361,796	329,102	616,771	397,723	17,857	201,191	65,852	339,827	617	2,973
1993.....	3,075,227	1,313,867	372,317	336,335	632,585	408,497	18,842	205,246	62,436	354,833	578	2,276
1994.....	3,124,009	1,329,241	384,590	331,416	647,848	421,730	20,034	206,084	72,662	356,097	529	1,626
1995.....	3,161,744	1,334,027	399,475	327,233	678,821	451,375	22,639	204,807	61,813	358,691	493	1,191
1996.....	3,187,291	1,352,339	396,980	321,703	690,618	459,254	23,776	207,588	61,618	362,751	444	838
1997.....	3,413,296	1,370,596	464,984	319,172	777,803	537,259	26,210	214,334	60,342	419,105	376	918
1998.....	3,307,618	1,405,342	409,489	313,423	741,412	495,678	26,755	218,979	54,551	382,619	346	436
1999.....	3,366,363	1,436,865	433,950	312,867	748,950	490,634	29,444	228,872	51,341	381,791	361	238
2000.....	3,404,466	1,447,269	460,351	310,703	753,430	502,351	33,300	217,779	50,925	381,341	282	165

CONTACT: Dana Nichele Mercer/Robert L. Hackendorf (410) 966-6377/965-5536 for further information.

## 6.F OASDI: Benefits Terminated

Table 6.F2.—Number, by reason for termination and type of benefit, 2000

Reason for termination	Total	Retired workers	Disabled workers	Wives and husbands	Children	Widows, widowers, and parents	Widowed mothers and fathers	Special age-72 beneficiaries
Total .....	3,404,466	1,447,269	460,351	310,703	753,430	381,623	50,925	165
Death of beneficiary .....	2,003,565	1,401,607	168,996	83,809	18,965	329,014	1,009	165
Termination resulting from death of worker .....	183,373	...	...	153,065	30,308	...	...	...
Marriage, remarriage, or divorce of beneficiary .....	36,406	...	...	4,970	16,823	4,396	10,217	...
Attainment of age—								
18 by children .....	399,831	...	...	...	399,831	...	...	...
19 by student .....	61,057	...	...	...	61,057	...	...	...
65 by disabled worker .....	244,156	...	212,948	19,493	11,715	...	...	...
65 by disabled widow(er) .....	13,391	...	...	...	...	13,391	...	...
Termination due to attainment of age 16 of child .....	61,840	...	...	27,080	...	...	34,760	...
Entitlement to an equal or larger								
Social Security benefit .....	83,401	33,961	4,167	7,440	3,027	30,992	3,814	...
Does not meet medical standards: <sup>1</sup>								
Disabled worker or widow(er) .....	118,495	...	68,226	4,080	45,939	250	...	...
Disabled adult child .....	5,299	...	...	...	5,299	...	...	...
Student no longer attending school .....	153,349	...	...	...	153,349	...	...	...
Other .....	40,303	11,701	6,014	10,766	7,117	3,580	1,125	...

<sup>1</sup> Excludes disabled beneficiaries whose monthly benefits have been suspended because of their ability to engage in substantial gainful activity. These persons continue to be eligible for Medicare for a 3-year period.

Table 6.F3.—Number of **wives, husbands, and children**, by reason for termination and type of benefit, 2000

Reason for termination	Wives and husbands of—		Children								
	Retired workers	Disabled workers	Under age 18 of—			Disabled, aged 18 or older of—			Students, aged 18–19 of—		
			Retired workers	Deceased workers	Disabled workers	Retired workers	Deceased workers	Disabled workers	Retired workers	Deceased workers	Disabled workers
Total .....	255,810	54,893	46,077	194,874	261,400	5,562	17,909	9,829	24,944	113,164	79,671
Death of beneficiary .....	82,380	1,429	203	1,902	961	2,822	12,402	463	13	132	67
Termination resulting from											
death of worker .....	147,317	5,748	...	...	27,497	...	...	1,644	...	...	1,167
Marriage, remarriage, or											
divorce of beneficiary .....	1,895	3,075	1,063	3,883	8,978	229	1,426	336	116	363	429
Attainment of age—											
18 by children .....	...	...	43,268	187,639	168,924	...	...	...	...	...	...
19 by student .....	...	...	...	...	...	...	...	...	6,608	33,171	21,278
65 by disabled worker .....	...	19,493	...	...	6,806	...	...	4,465	...	...	444
Termination due to attainment of											
age 16 of child .....	9,250	17,830	...	...	...	...	...	...	...	...	...
Entitlement to an equal or larger											
Social Security benefit .....	6,049	1,391	865	192	735	576	296	264	60	12	27
Does not meet medical											
standards: <sup>1</sup>											
Disabled worker .....	...	4,080	...	...	43,880	...	...	1,691	...	...	368
Disabled adult child .....	...	...	...	...	...	1,255	3,638	406	...	...	...
Student no longer attending school .....	...	...	...	...	...	...	...	...	18,113	79,429	55,807
Other .....	8,919	1,847	678	1,258	3,619	680	147	560	34	57	84

<sup>1</sup> Excludes disabled beneficiaries whose monthly benefits have been suspended because of their ability to engage in substantial gainful activity. These persons continue to be eligible for Medicare for a 3-year period.

Table 7.A1.—Number of persons receiving federally administered payments, total amount and average monthly amount, by source of payment, category, and age, December 2000

Source of payment	Total	Category			Age		
		Aged	Blind	Disabled	Under 18	18–64	65 or older <sup>1</sup>
Number of persons							
Total .....	6,601,686	1,289,339	78,511	5,233,836	846,784	3,744,022	2,010,880
Federal payment only .....	4,121,049	666,671	42,571	3,411,807	607,415	2,413,695	1,099,939
Federal payment and state supplementation .....	2,198,858	519,638	30,360	1,648,860	237,064	1,195,468	766,326
State supplementation only .....	281,779	103,030	5,580	173,169	2,305	134,859	144,615
Total with—							
Federal payment .....	6,319,907	1,186,309	72,931	5,060,667	844,479	3,609,163	1,866,265
State supplementation .....	2,480,637	622,668	35,940	1,822,029	239,369	1,330,327	910,941
Amount of payments (in thousands) <sup>2</sup>							
Total .....	\$2,676,378	\$390,787	\$33,274	\$2,252,317	\$419,577	\$1,641,231	\$615,570
Federal payments .....	2,383,254	309,590	26,936	2,046,728	405,864	1,480,228	497,162
State supplementation .....	293,124	81,198	6,337	205,589	13,713	161,003	118,408
Average monthly amount <sup>3</sup>							
Total .....	\$378.82	\$299.69	\$413.22	\$397.92	\$463.05	\$401.20	\$302.68
Federal payments .....	351.48	258.12	360.51	373.41	449.34	374.74	263.54
State supplementation .....	112.50	128.46	171.01	105.86	53.04	112.39	127.99

<sup>1</sup> Includes approximately 18,800 blind and 702,700 disabled persons aged 65 or older.

<sup>2</sup> Includes retroactive payments.

<sup>3</sup> Excludes retroactive payments.

Table 7.A2.—Number of persons<sup>1</sup> receiving federally administered payments, total amount and average monthly amount, by source of payment and category, December 2000

Source of payment	Aged		Blind		Disabled		Blind and disabled, under age 18
	Individual	Couple	Individual	Couple	Individual	Couple	
Number of persons							
Total .....	1,033,262	133,081	66,906	3,000	4,109,014	136,779	846,784
Federal payment only .....	564,211	52,570	36,617	1,325	2,645,038	79,931	607,415
Federal payment and state supplementation .....	390,802	68,054	25,275	1,408	1,307,947	49,735	237,064
State supplementation only .....	78,249	12,457	5,014	267	156,029	7,113	2,305
Total with—							
Federal payment .....	955,013	120,624	61,892	2,733	3,952,985	129,666	844,479
State supplementation .....	469,051	80,511	30,289	1,675	1,463,976	56,848	239,369
Amount of payments (in thousands)							
Total .....	\$305,613	\$90,081	\$27,994	\$2,299	\$1,743,512	\$87,303	\$419,577
Federal payments .....	249,063	64,159	22,806	1,533	1,569,635	70,194	405,864
State supplementation .....	56,550	25,922	5,188	765	173,877	17,109	13,713
Average monthly amount							
Total .....	\$292.67	\$665.60	\$407.94	\$746.27	\$391.03	\$608.49	\$463.05
Federal payments .....	258.18	523.37	359.61	544.53	365.21	517.04	449.34
State supplementation .....	118.60	317.01	166.11	451.18	111.26	286.83	53.04

<sup>1</sup> See Eligible couple (SSI) and Eligible individual (SSI) in the Glossary.

CONTACT: Arthur Kahn (410) 965-0186 for further information.

## 7.A SSI: Summary

Table 7.A3.—Number of persons receiving payments, by source of payment and category, 1974–2000

Month and year	Total	Federally administered	Federal SSI	State supplementation				
				Total	Federally administered		State administered	
					Total	Only	Total	Only
All persons								
January 1974	3,248,949	3,215,632	2,955,959	1,838,602	1,480,309	259,673	358,293	33,317
December:								
1975	4,359,625	4,314,275	3,893,419	1,987,409	1,684,018	420,856	303,391	45,350
1980	4,194,100	4,142,017	3,682,411	1,934,239	1,684,765	459,606	249,474	52,083
1985	4,200,177	4,138,021	3,799,092	1,915,503	1,660,847	338,929	254,656	62,156
1990	4,888,180	4,817,127	4,412,131	2,343,803	2,058,273	404,996	285,530	71,053
1995	6,575,753	6,514,134	6,194,493	2,817,408	2,517,805	319,641	299,603	61,619
1996	6,676,729	6,613,718	6,325,531	2,731,681	2,421,470	288,187	310,211	63,011
1997	6,564,613	6,494,985	6,211,867	3,029,449	2,372,479	283,118	656,970	69,628
1998	6,649,465	6,566,069	6,289,070	3,072,392	2,411,707	276,999	660,685	83,396
1999	6,641,256	6,556,634	6,274,707	3,116,309	2,441,482	281,927	674,827	84,622
2000	6,685,169	6,601,686	6,319,907	3,163,504	2,480,637	281,779	682,867	83,483
Aged								
January 1974	1,889,898	1,865,109	1,690,496	1,022,244	770,318	174,613	251,926	24,789
December:								
1975	2,333,685	2,307,105	2,024,765	1,028,596	843,917	282,340	184,679	26,580
1980	1,838,381	1,807,776	1,533,366	837,318	702,763	274,410	134,555	30,605
1985	1,529,674	1,504,469	1,322,292	698,634	583,913	182,177	114,721	25,205
1990	1,484,160	1,454,041	1,256,623	765,420	649,530	197,418	115,890	30,119
1995	1,479,415	1,446,122	1,314,720	777,841	663,390	131,402	114,451	33,293
1996	1,446,321	1,412,632	1,296,462	752,760	638,173	116,170	114,587	33,689
1997	1,395,845	1,362,350	1,251,374	750,168	619,516	110,976	130,652	33,495
1998	1,369,206	1,331,782	1,225,578	756,209	617,984	106,204	138,225	37,424
1999	1,346,771	1,308,062	1,203,056	759,681	620,261	105,006	139,420	38,709
2000	1,327,567	1,289,339	1,186,309	767,312	622,668	103,030	144,644	38,228
Blind								
January 1974	73,850	72,390	55,680	45,828	37,326	16,710	8,502	1,460
December:								
1975	75,315	74,489	68,375	36,309	31,376	6,114	4,933	826
1980	79,139	78,401	68,945	39,863	36,214	9,456	3,649	738
1985	82,622	82,220	73,817	41,323	38,291	8,403	3,032	402
1990	84,109	83,686	74,781	43,376	40,334	8,905	3,042	423
1995	84,273	83,545	77,064	42,272	38,695	6,481	3,577	728
1996	82,815	82,137	76,180	40,173	36,759	5,957	3,414	678
1997	81,449	80,778	74,926	40,593	36,050	5,852	4,543	671
1998	81,029	80,243	74,623	40,828	36,193	5,620	4,635	786
1999	80,097	79,291	73,579	40,765	36,118	5,712	4,647	806
2000	79,295	78,511	72,931	40,585	35,940	5,580	4,645	784
Disabled								
January 1974	1,285,201	1,278,122	1,209,783	769,501	672,575	68,350	96,926	7,068
December:								
1975	1,950,625	1,932,681	1,800,279	922,229	808,725	132,402	113,504	17,944
1980	2,276,130	2,255,840	2,080,100	1,050,155	945,788	175,740	104,367	20,290
1985	2,586,741	2,551,332	2,402,983	1,167,326	1,038,643	148,349	128,683	35,409
1990	3,319,911	3,279,400	3,080,727	1,535,007	1,368,409	198,673	166,598	40,511
1995	5,010,326	4,984,467	4,802,709	1,995,262	1,815,720	181,758	179,542	25,859
1996	5,145,850	5,118,949	4,952,889	1,933,493	1,746,538	166,060	186,955	26,901
1997	5,078,995	5,051,857	4,885,567	1,998,187	1,716,913	166,290	281,274	27,138
1998	5,190,815	5,154,044	4,988,869	2,067,530	1,757,530	165,175	310,000	36,771
1999	5,205,997	5,169,281	4,998,072	2,107,982	1,785,103	171,209	322,879	36,716
2000	5,270,126	5,233,836	5,060,667	2,147,945	1,822,029	173,169	325,916	36,290

CONTACT: Arthur Kahn (410) 965-0186 for further information.

Table 7.A4.—Total annual amount of payments, by source of payment and category, 1974–2000

[In thousands]

Calendar year	Total <sup>1</sup>	Federal SSI <sup>1</sup>	State supplementation	
			Federally administered	State administered <sup>1</sup>
All persons				
1974.....	\$5,245,719	\$3,833,161	\$1,263,652	\$148,906
1975.....	5,878,224	4,313,538	1,402,534	162,152
1980.....	7,940,734	5,866,354	1,848,286	226,094
1985.....	11,060,476	8,777,341	1,972,597	310,538
1990.....	16,598,680	12,893,805	3,239,154	465,721
1992.....	22,232,503	18,246,934	3,435,476	550,093
1993.....	24,556,867	20,721,613	3,269,540	565,714
1994.....	25,876,571	22,175,233	3,115,854	585,483
1995.....	27,627,658	23,919,430	3,117,850	590,378
1996.....	28,791,924	25,264,878	2,987,596	539,450
1997.....	29,052,089	25,457,387	2,913,181	681,521
1998.....	30,216,345	26,404,793	3,003,415	808,137
1999.....	30,959,475	26,805,156	3,300,976	853,343
2000.....	31,564,439	27,290,248	3,381,451	892,740
Aged				
1974.....	\$2,503,407	\$1,782,742	\$631,292	\$89,373
1975.....	2,604,792	1,842,980	673,535	88,277
1980.....	2,734,270	1,860,194	756,829	117,247
1985.....	3,034,596	2,202,557	694,114	137,925
1990.....	3,736,104	2,521,382	1,038,006	176,716
1992.....	4,139,612	2,901,063	1,023,030	215,519
1993.....	4,250,092	3,097,616	933,852	218,624
1994.....	4,366,528	3,265,711	876,053	224,764
1995.....	4,467,146	3,374,772	864,450	227,924
1996.....	4,507,202	3,449,407	833,091	224,705
1997.....	4,531,973	3,479,948	823,581	228,444
1998.....	4,424,877	3,327,856	838,375	258,646
1999.....	4,724,748	3,514,689	921,332	271,003
2000.....	4,811,048	3,595,384	942,530	283,073
Blind				
1974.....	\$130,195	\$91,308	\$34,483	\$4,404
1975.....	130,936	92,427	34,813	3,696
1980.....	190,075	131,506	54,321	4,248
1985.....	264,162	195,183	64,657	4,322
1990.....	334,120	238,415	90,534	5,171
1992.....	370,769	275,606	87,783	7,380
1993.....	374,998	287,754	79,479	7,765
1994.....	372,461	292,102	72,596	7,763
1995.....	375,512	298,238	69,203	8,071
1996.....	371,869	298,897	65,894	7,077
1997.....	374,857	302,656	65,189	7,012
1998.....	366,452	291,050	67,137	8,265
1999.....	391,181	308,556	73,028	8,557
2000.....	394,484	312,144	73,688	8,636
Disabled				
1974.....	\$2,601,936	\$1,959,112	\$597,876	\$44,948
1975.....	3,142,476	2,378,131	694,186	70,159
1980.....	5,013,948	3,874,655	1,037,137	102,156
1985.....	7,754,588	6,379,601	1,213,826	161,161
1990.....	12,520,568	10,134,007	2,110,615	275,946
1992.....	17,710,514	15,070,265	2,324,664	315,585
1993.....	19,925,929	17,336,243	2,256,209	333,477
1994.....	21,131,001	18,617,421	2,167,205	346,375
1995.....	22,778,547	20,246,415	2,184,197	347,935
1996.....	23,905,578	21,516,579	2,088,610	300,389
1997.....	24,006,254	21,685,421	2,024,410	296,423
1998.....	25,304,721	22,785,879	2,097,903	420,939
1999.....	25,722,400	22,598,270	2,306,616	452,640
2000.....	26,198,350	23,399,442	2,365,233	479,635

<sup>1</sup> Includes data not distributed by category.

## 7.A SSI: Summary

Table 7.A5.—Average monthly amount,<sup>1</sup> by source of payment and category, 1975–2000

December	Total	Federally administered	Federal SSI	State supplementation		
				Total	Federally administered	State administered <sup>2</sup>
Total						
1975.....	\$108.46	\$106.33	\$90.59	\$57.55	\$61.72	\$38.69
1980.....	164.66	161.92	138.14	93.44	95.17	81.57
1985.....	220.70	218.09	193.77	99.37	99.39	99.21
1990.....	279.91	276.45	241.52	128.24	127.83	131.32
1995.....	338.73	335.45	312.83	103.23	98.66	142.59
1996.....	347.62	343.88	322.11	104.82	98.80	152.91
1997.....	356.96	350.58	327.53	101.46	101.92	99.82
1998.....	365.28	359.45	336.06	102.47	102.33	102.97
1999.....	374.96	368.53	341.86	110.44	110.92	108.70
2000.....	385.52	378.82	351.48	112.16	112.50	110.95
Aged						
1975.....	\$88.91	\$86.72	\$73.77	\$50.61	\$57.38	\$28.68
1980.....	130.28	126.66	105.69	92.64	95.60	77.55
1985.....	168.16	164.01	141.41	101.25	103.58	89.91
1990.....	213.40	208.26	170.74	133.62	136.31	118.82
1995.....	256.66	250.27	220.15	116.26	109.62	153.94
1996.....	267.69	260.27	228.25	120.53	111.74	168.66
1997.....	275.83	268.46	235.45	120.11	114.35	147.09
1998.....	285.95	277.45	243.28	123.29	115.29	158.80
1999.....	298.23	289.19	249.36	133.51	125.90	167.17
2000.....	309.40	299.69	258.12	135.88	128.46	167.49
Blind						
1975.....	\$140.20	\$137.58	\$112.69	\$68.81	\$78.57	\$35.40
1980.....	195.60	192.51	163.36	109.79	111.41	97.56
1985.....	263.86	260.25	224.31	121.76	122.15	118.07
1990.....	323.31	319.03	267.34	165.57	167.29	148.26
1995.....	360.61	355.24	317.06	143.65	138.31	188.15
1996.....	366.59	362.07	326.16	141.92	138.18	171.65
1997.....	385.42	381.65	337.79	149.55	152.83	123.70
1998.....	395.20	390.19	344.77	154.21	154.33	153.18
1999.....	407.19	401.99	350.72	166.66	167.64	159.15
2000.....	418.14	413.22	360.51	168.91	171.01	154.79
Disabled						
1975.....	\$130.59	\$128.49	\$108.55	\$65.63	\$65.68	\$65.20
1980.....	190.96	188.70	160.78	93.57	94.38	86.19
1985.....	248.36	246.50	219.61	97.73	96.63	107.06
1990.....	305.82	302.78	266.84	125.01	123.36	139.70
1995.....	360.99	358.18	336.39	97.76	94.26	134.44
1996.....	368.65	365.49	345.36	98.32	93.63	142.92
1997.....	375.45	372.52	351.28	95.09	96.29	87.88
1998.....	384.67	380.46	359.07	99.32	96.63	114.30
1999.....	393.18	388.29	364.24	107.06	104.52	120.92
2000.....	402.93	397.92	373.41	108.66	105.86	124.09

<sup>1</sup> Excludes retroactive payments.

<sup>2</sup> Includes data not distributed by category.

CONTACT: Arthur Kahn (410) 965-0186 for further information.



Table 7.A8.—Number of federally administered **awards**, by category and age, 1974–2000 <sup>1</sup>

[Based on 10-percent sample]

Year	Total	Category			Age		
		Aged	Blind	Disabled	Under 18	18–64	65 or older
Total.....	21,523,610	6,816,880	271,940	14,434,790	2,352,250	12,431,790	6,739,570
Awards based on:							
State conversions.....	3,150,690	1,760,970	77,810	1,311,910	3,160	1,303,490	1,844,040
New applications:							
1974.....	1,337,630	770,880	8,700	558,050	66,970	497,910	772,750
1975.....	927,770	350,130	9,090	568,550	62,900	513,590	351,280
1976.....	674,560	222,900	7,040	444,620	45,060	408,010	221,490
1980.....	526,780	185,340	8,850	332,590	46,240	299,950	180,590
1981.....	411,500	122,690	8,250	280,560	39,020	254,880	117,600
1982.....	342,650	103,350	6,810	232,490	35,680	206,550	100,420
1983.....	458,590	152,800	7,760	298,030	42,110	267,620	148,860
1984.....	586,700	217,210	8,950	360,540	45,750	331,340	209,610
1985.....	527,790	155,880	8,290	363,620	46,580	335,340	145,870
1986.....	603,560	159,740	7,780	436,040	51,060	404,470	148,030
1987.....	589,460	166,250	8,420	414,790	48,490	386,970	154,000
1988.....	578,340	168,570	7,150	402,620	47,570	374,290	156,480
1989.....	629,500	188,040	7,040	434,420	51,530	401,060	176,910
1990.....	718,300	193,380	7,980	516,940	76,120	459,800	182,380
1991.....	822,880	189,860	7,570	625,540	126,190	518,610	178,080
1992.....	1,049,250	190,170	8,260	850,820	221,120	650,260	177,870
1993.....	1,054,190	185,770	7,040	861,380	236,250	644,810	173,130
1994.....	944,780	158,400	6,600	779,780	203,220	595,620	145,940
1995.....	893,440	142,140	5,950	745,350	177,620	586,120	129,700
1996.....	798,000	124,020	5,540	668,440	144,300	535,270	118,430
1997.....	673,390	93,810	4,870	574,710	116,350	461,580	95,460
1998.....	739,680	108,920	6,320	624,440	135,650	489,950	114,080
1999.....	757,580	120,630	5,840	631,110	139,480	494,180	123,920
2000.....	747,170	116,470	5,830	624,870	144,560	483,170	119,440

<sup>1</sup>Represents period in which first payment was made, not date of entitlement to payments.

CONTACT: Clark Pickett (410) 965-9016 for further information.

Table 7.A9.—Number of persons receiving federally administered payments, by category, 1974–2000

December	Total	Category			Age		
		Aged	Blind	Disabled	Under 18	18–64	65 or older
1974.....	3,996,064	2,285,909	74,616	1,635,539	70,900	1,503,155	2,422,009
1975.....	4,314,275	2,307,105	74,489	1,932,681	107,026	1,699,394	2,507,855
1976.....	4,235,939	2,147,697	76,366	2,011,876	125,412	1,713,594	2,396,933
1980.....	4,142,017	1,807,776	78,401	2,255,840	190,394	1,730,847	2,220,776
1981.....	4,018,875	1,678,090	78,570	2,262,215	194,890	1,702,895	2,121,090
1982.....	3,857,590	1,548,741	77,356	2,231,493	191,570	1,655,279	2,010,741
1983.....	3,901,497	1,515,400	78,960	2,307,137	198,323	1,699,774	2,003,400
1984.....	4,029,333	1,530,287	80,524	2,418,522	211,587	1,780,459	2,037,287
1985.....	4,138,021	1,504,469	82,220	2,551,332	227,384	1,879,168	2,031,469
1986.....	4,269,184	1,473,428	83,115	2,712,641	241,198	2,010,458	2,017,528
1987.....	4,384,999	1,455,387	83,421	2,846,191	250,902	2,118,710	2,015,387
1988.....	4,463,869	1,433,420	82,864	2,947,585	255,135	2,202,714	2,006,020
1989.....	4,593,059	1,439,043	82,765	3,071,251	264,890	2,301,926	2,026,243
1990.....	4,817,127	1,454,041	83,686	3,279,400	308,589	2,449,897	2,058,641
1991.....	5,118,470	1,464,684	84,549	3,569,237	397,162	2,641,524	2,079,784
1992.....	5,566,189	1,471,022	85,400	4,009,767	556,470	2,910,016	2,099,703
1993.....	5,984,330	1,474,852	85,456	4,424,022	722,678	3,148,413	2,113,239
1994.....	6,295,786	1,465,905	84,911	4,744,970	841,474	3,335,255	2,119,057
1995.....	6,514,134	1,446,122	83,545	4,984,467	917,048	3,482,256	2,114,830
1996.....	6,613,718	1,412,632	82,137	5,118,949	955,174	3,568,393	2,090,151
1997.....	6,494,985	1,362,350	80,778	5,051,857	879,828	3,561,625	2,053,532
1998.....	6,566,069	1,331,782	80,243	5,154,044	887,066	3,646,020	2,032,983
1999.....	6,556,634	1,308,062	79,291	5,169,281	847,063	3,690,970	2,018,601
2000.....	6,601,686	1,289,339	78,511	5,233,836	846,784	3,744,022	2,010,880

CONTACT: Arthur Kahn (410) 965-0186 for further information.

## 7.B SSI: State Data

Table 7.B1.—Number of persons receiving federally administered payments and total annual amount, by category, 2000

State	Number, December				Amount of payments, calendar year (in thousands)			
	Total	Aged	Blind <sup>1</sup>	Disabled <sup>2</sup>	Total	Aged	Blind	Disabled
Total <sup>3</sup>	6,601,686	1,289,339	78,511	5,233,836	\$30,671,699	\$4,540,045	\$385,927	\$25,745,710
Alabama	159,343	26,534	1,152	131,657	658,648	52,344	4,514	601,791
Alaska	8,636	1,453	123	7,060	36,717	3,907	514	32,296
Arizona	81,278	13,194	959	67,125	355,074	39,084	4,333	311,656
Arkansas	85,310	14,206	943	70,161	332,628	25,114	3,871	303,644
California	1,087,614	333,892	21,949	731,773	6,385,553	1,729,632	140,135	4,515,786
Colorado	53,694	8,985	553	44,156	228,481	26,795	2,378	199,307
Connecticut	48,731	7,115	510	41,106	215,865	23,658	2,262	189,946
Delaware	11,961	1,387	117	10,457	50,172	3,388	490	46,294
District of Columbia	20,073	2,524	190	17,359	92,673	6,987	885	84,801
Florida	376,555	94,038	3,109	279,408	1,620,866	312,575	13,286	1,295,005
Georgia	196,780	34,112	2,264	160,404	785,363	73,308	9,454	702,601
Hawaii	21,009	7,047	168	13,794	103,603	29,248	841	73,514
Idaho	18,347	1,839	182	16,326	76,065	3,908	730	71,426
Illinois	248,833	32,541	2,374	213,918	1,174,336	113,997	10,613	1,049,727
Indiana	88,017	7,309	1,045	79,663	381,786	16,396	4,317	361,073
Iowa	40,298	4,477	827	34,994	157,905	9,595	3,174	145,135
Kansas	36,277	3,784	376	32,117	151,084	9,224	1,630	140,230
Kentucky	174,346	18,753	1,442	154,151	740,790	38,492	6,117	696,181
Louisiana	165,525	24,563	1,894	139,068	715,106	53,293	7,911	653,902
Maine	29,705	3,298	234	26,173	115,902	5,584	909	109,410
Maryland	88,073	15,726	745	71,602	400,089	49,697	3,241	347,151
Massachusetts	167,784	45,959	4,251	117,574	807,328	171,146	21,946	614,235
Michigan	209,608	19,413	1,892	188,303	988,272	57,019	8,602	922,651
Minnesota	64,084	10,152	721	53,211	271,952	30,256	3,071	238,625
Mississippi	128,791	22,440	1,257	105,094	512,112	43,535	4,921	463,656
Missouri	112,230	12,877	987	98,366	470,986	27,929	3,977	439,079
Montana	13,845	1,342	125	12,378	57,334	2,695	522	54,117
Nebraska	21,221	2,382	239	18,600	85,105	5,284	965	78,855
Nevada	25,405	6,972	644	17,789	108,413	21,989	3,168	83,256
New Hampshire	11,577	1,006	119	10,452	48,825	2,380	490	45,956
New Jersey	146,350	34,048	1,080	111,222	672,255	124,176	4,692	543,387
New Mexico	46,662	8,930	566	37,166	193,252	22,370	2,465	168,417
New York	617,167	138,971	3,370	474,826	3,197,466	572,354	16,009	2,609,104
North Carolina	191,053	33,990	2,093	154,970	731,568	68,029	8,273	655,266
North Dakota	8,167	1,351	80	6,736	29,797	2,815	325	26,656
Ohio	239,911	17,526	2,248	220,137	1,114,044	47,524	9,668	1,056,852
Oklahoma	72,140	10,782	866	60,492	302,057	23,276	3,623	275,157
Oregon	51,936	7,238	634	44,064	228,109	21,400	2,757	203,952
Pennsylvania	283,969	36,547	2,457	244,965	1,367,077	109,264	11,256	1,246,556
Rhode Island	27,778	4,606	226	22,946	130,379	14,977	991	114,411
South Carolina	107,469	17,162	1,583	88,724	428,933	34,925	6,501	387,507
South Dakota	12,642	1,999	110	10,533	48,363	3,936	426	44,001
Tennessee	164,202	23,118	1,663	139,421	664,461	45,861	6,992	611,607
Texas	409,162	115,402	5,725	288,035	1,574,945	294,276	23,571	1,257,098
Utah	20,130	2,096	270	17,764	87,074	6,769	1,201	79,104
Vermont	12,525	1,567	115	10,843	51,487	3,216	507	47,765
Virginia	131,942	24,530	1,455	105,957	535,180	65,276	6,092	463,811
Washington	100,761	14,148	949	85,664	484,345	54,941	4,424	424,979
West Virginia	71,420	5,527	589	65,304	318,198	10,983	2,555	304,661
Wisconsin	84,887	9,771	969	74,147	357,084	23,598	4,033	329,454
Wyoming	5,798	559	53	5,186	23,444	988	209	22,247
Other:								
Northern Mariana Islands	665	151	19	495	3,174	643	90	2,440

<sup>1</sup> Includes approximately 18,800 blind persons aged 65 or older.

<sup>2</sup> Includes approximately 702,700 disabled persons aged 65 or older.

<sup>3</sup> Includes data not distributed by state.

CONTACT: Stella M. Coleman/Art Kahn (410) 965-0157/0186 for further information.

Table 7.B2.—Number of persons receiving state-administered supplementation and total amount of payments, by category, 2000 <sup>1</sup>

State	Number, December				Amount of payments, calendar year (In thousands)			
	Total	Aged	Blind	Disabled	Total	Aged	Blind	Disabled
Total .....	<sup>2</sup> 682,867	144,644	4,645	325,916	<sup>2</sup> \$892,740	\$283,073	\$8,636	\$479,635
Alabama .....	823	370	13	440	570	257	8	305
Alaska .....	13,911	4,662	93	9,156	51,210	16,837	356	34,017
Arizona .....	457	...	...	457	250	...	...	250
Colorado .....	31,297	23,834	18	7,445	74,293	53,728	46	20,519
Connecticut .....	22,329	6,401	131	15,797	87,365	30,001	560	56,804
Florida .....	15,762	7,344	9	8,409	27,876	12,283	15	15,578
Idaho .....	10,248	2,056	27	8,165	8,379	1,406	19	6,954
Illinois .....	35,810	7,710	168	27,932	28,592	7,437	181	20,974
Indiana .....	1,140	525	6	609	4,577	1,697	15	2,865
Iowa .....	4,324	1,195	...	3,129	16,676	(3)	(3)	(3)
Kentucky .....	4,891	2,103	37	2,751	17,198	7,549	83	9,566
Louisiana .....	5,209	(3)	(3)	(3)	497	(3)	(3)	(3)
Maine .....	34,489	7,030	147	27,312	9,100	3,097	56	5,947
Maryland .....	2,972	(3)	(3)	(3)	6,952	(3)	(3)	(3)
Michigan .....	195,701	(3)	(3)	(3)	94,883	(3)	(3)	(3)
Minnesota .....	36,494	8,108	182	28,204	76,460	9,342	269	66,849
Missouri .....	9,022	3,244	847	4,931	25,354	9,204	3,154	12,996
Nebraska .....	5,574	1,327	47	4,200	6,255	1,332	24	4,899
New Hampshire .....	17,039	8,340	335	8,364	11,848	1,834	687	9,327
New Mexico .....	203	(3)	(3)	(3)	235	(3)	(3)	(3)
North Carolina .....	23,063	13,006	124	9,933	123,651	65,758	853	57,040
North Dakota .....	355	151	1	203	2,225	1,009	30	1,186
Oklahoma .....	70,972	21,652	530	48,790	37,429	10,029	299	27,101
Oregon .....	16,972	4,710	706	11,556	20,442	17,875	390	2,177
South Carolina .....	3,647	1,981	15	1,651	13,877	7,328	71	6,478
South Dakota .....	3,577	(3)	(3)	(3)	2,153	(3)	(3)	(3)
Virginia .....	6,598	2,984	15	3,599	20,270	8,876	48	11,346
Washington .....	70	11	2	57	310	35	3	272
Wisconsin .....	107,090	15,829	1,164	90,097	123,132	16,141	1,462	105,529
Wyoming .....	2,828	71	28	2,729	681	18	7	656

<sup>1</sup> Data reported to the Social Security Administration by individual states. All data subject to revision. Excludes optional supplementation data for Missouri and North Dakota.

<sup>2</sup> Includes data not distributed by category.

## 7.B SSI: State Data

Table 7.B3.—Number of persons receiving federally administered payments and average monthly amount, December 2000

State	Total		Federal SSI		State supplementation		Number with—		
	Number	Average monthly amount	Number	Average monthly amount	Number	Average monthly amount	Federal SSI only	Federal SSI and state supplementation	State supplementation only
Total <sup>1</sup> .....	6,601,686	\$378.82	6,319,907	\$351.48	2,480,637	\$112.50	4,121,049	2,198,858	281,779
Alabama.....	159,343	327.13	159,343	327.13	...	307.00	159,342	...	...
Alaska.....	8,636	344.48	8,636	344.47	...	22.90	8,636	...	...
Arizona.....	81,278	359.68	81,278	359.67	...	173.50	81,278	...	...
Arkansas.....	85,310	309.82	85,310	309.82	8	53.16	85,302	8	...
California.....	1,087,614	484.97	906,163	367.62	1,086,919	178.41	695	905,468	181,451
Colorado.....	53,694	340.70	53,694	340.69	...	...	53,694	...	...
Connecticut.....	48,731	360.83	48,731	360.84	...	...	48,730	...	...
Delaware.....	11,961	344.43	11,839	340.97	643	126.83	11,318	521	122
District of Columbia.....	20,073	377.32	19,932	365.82	1,720	163.05	18,353	1,579	141
Florida.....	376,555	352.51	376,555	352.51	7	36.55	376,548	7	...
Georgia.....	196,780	322.96	196,779	322.97	15	26.98	196,765	14	1
Hawaii.....	21,009	397.72	20,212	361.97	19,522	53.37	1,487	18,725	797
Idaho.....	18,347	336.26	18,347	336.26	...	...	18,346	...	...
Illinois.....	248,833	386.16	248,833	386.16	...	...	248,831	...	...
Indiana.....	88,017	352.31	88,017	352.31	...	...	88,017	...	...
Iowa.....	40,298	324.34	40,031	321.10	1,647	132.93	38,651	1,380	267
Kansas.....	36,277	340.81	36,276	340.80	14	51.24	36,263	13	1
Kentucky.....	174,346	349.35	174,346	349.35	...	...	174,346	...	...
Louisiana.....	165,525	345.13	165,523	345.13	22	16.81	165,503	20	2
Maine.....	29,705	316.10	29,705	316.10	...	...	29,703	...	...
Maryland.....	88,073	363.51	88,072	363.50	38	42.43	88,035	37	1
Massachusetts.....	167,784	394.68	147,625	355.72	167,563	81.59	221	147,404	20,159
Michigan.....	209,608	383.65	205,247	380.69	19,191	119.03	190,417	14,830	4,361
Minnesota.....	64,084	349.96	64,084	349.96	...	...	64,084	...	...
Mississippi.....	128,791	321.61	128,789	321.61	19	21.84	128,772	17	2
Missouri.....	112,230	341.86	112,230	341.86	...	...	112,230	...	...
Montana.....	13,845	336.15	13,747	333.72	895	76.50	12,950	797	98
Nebraska.....	21,221	325.85	21,221	325.85	...	...	21,221	...	...
Nevada.....	25,405	349.15	24,576	344.34	7,481	53.63	17,924	6,652	829
New Hampshire.....	11,577	332.61	11,577	332.59	...	...	11,577	...	...
New Jersey.....	146,350	373.04	138,729	347.97	145,733	44.09	617	138,112	7,621
New Mexico.....	46,662	336.37	46,662	336.37	...	...	46,662	...	...
New York.....	617,167	420.79	569,928	376.50	612,031	73.84	5,136	564,792	47,239
North Carolina.....	191,053	310.83	191,053	310.83	...	...	191,053	...	...
North Dakota.....	8,167	298.15	8,167	298.15	...	...	8,167	...	...
Ohio.....	239,911	377.49	239,910	377.48	30	30.00	239,881	29	1
Oklahoma.....	72,140	332.77	72,140	332.77	...	...	72,139	...	...
Oregon.....	51,936	354.57	51,936	354.57	...	...	51,935	...	...
Pennsylvania.....	283,969	390.24	271,391	369.62	278,797	37.96	5,172	266,219	12,578
Rhode Island.....	27,778	383.58	25,019	349.50	27,740	68.96	38	24,981	2,759
South Carolina.....	107,469	324.23	107,469	324.22	...	...	107,468	...	...
South Dakota.....	12,642	314.92	12,642	314.89	12	34.68	12,630	12	...
Tennessee.....	164,202	331.89	164,201	331.89	8	21.94	164,194	7	1
Texas.....	409,162	312.36	409,160	312.36	...	...	409,156	...	...
Utah.....	20,130	354.05	20,127	353.93	1,514	2.77	18,616	1,511	3
Vermont.....	12,525	340.87	11,214	313.89	12,478	60.27	47	11,167	1,311
Virginia.....	131,942	329.45	131,942	329.44	...	...	131,942	...	...
Washington.....	100,761	388.04	98,729	376.47	96,573	20.18	4,188	94,541	2,032
West Virginia.....	71,420	359.87	71,420	359.87	...	...	71,420	...	...
Wisconsin.....	84,887	345.39	84,887	345.39	...	...	84,886	...	...
Wyoming.....	5,798	329.30	5,798	329.30	...	...	5,798	...	...
Other:									
Northern Mariana Islands...	665	412.39	665	412.39	...	...	665	...	...

<sup>1</sup> Includes data not distributed by state.

CONTACT: Arthur Kahn (410) 965-0186 for further information.

Table 7.B7.—Total amount, federal payments, and state supplementation, calendar year 2000

[In thousands]

State	Total	Federal SSI	State supplementation	
			Federally administered	State administered
Total <sup>1</sup> .....	\$31,564,439	\$27,290,248	\$3,381,451	\$892,740
Alabama.....	659,218	658,648	...	570
Alaska.....	87,927	36,717	...	51,210
Arizona.....	355,324	355,074	...	250
Arkansas.....	332,628	332,628	...	...
California.....	6,385,553	4,041,417	2,344,136	...
Colorado.....	302,774	228,481	...	74,293
Connecticut.....	303,230	215,865	...	87,365
Delaware.....	50,172	49,227	945	...
District of Columbia.....	92,673	89,376	3,297	...
Florida.....	1,648,742	1,620,862	4	27,876
Georgia.....	785,363	785,363	...	...
Hawaii.....	103,603	90,874	12,729	...
Idaho.....	84,444	76,065	...	8,379
Illinois.....	1,202,928	1,174,336	...	28,592
Indiana.....	386,363	381,786	...	4,577
Iowa.....	174,581	155,214	2,691	16,676
Kansas.....	151,084	151,084	...	...
Kentucky.....	757,988	740,790	...	17,198
Louisiana.....	715,603	715,106	...	497
Maine.....	125,002	115,902	...	9,100
Maryland.....	407,041	400,086	3	6,952
Massachusetts.....	807,328	641,376	165,952	...
Michigan.....	1,083,155	960,707	27,565	94,883
Minnesota.....	348,412	271,952	...	76,460
Mississippi.....	512,112	512,111	1	...
Missouri.....	496,340	470,986	...	25,354
Montana.....	57,334	56,523	811	...
Nebraska.....	91,360	85,105	...	6,255
Nevada.....	108,413	103,556	4,857	...
New Hampshire.....	60,673	48,825	...	11,848
New Jersey.....	672,255	593,624	78,631	...
New Mexico.....	193,487	193,252	...	235
New York.....	3,197,466	2,647,827	549,639	...
North Carolina.....	855,219	731,568	...	123,651
North Dakota.....	32,022	29,797	...	2,225
Ohio.....	1,114,044	1,114,042	2	...
Oklahoma.....	339,486	302,057	...	37,429
Oregon.....	248,551	228,109	...	20,442
Pennsylvania.....	1,367,077	1,237,548	129,529	...
Rhode Island.....	130,379	106,976	23,403	...
South Carolina.....	442,810	428,933	...	13,877
South Dakota.....	50,516	48,358	5	2,153
Tennessee.....	664,461	664,459	2	...
Texas.....	1,574,945	1,574,945	...	...
Utah.....	87,074	87,023	51	...
Vermont.....	51,487	42,478	9,009	...
Virginia.....	555,450	535,180	...	20,270
Washington.....	484,655	456,107	28,238	310
West Virginia.....	318,198	318,198	...	...
Wisconsin.....	480,216	357,084	...	123,132
Wyoming.....	24,125	23,444	...	681
Other:				
Northern Mariana Islands.....	3,174	3,174	...	...

<sup>1</sup> Includes data not distributed by state.

**7.B SSI: State Data**

 Table 7.B8.—Number of **blind and disabled persons under age 18** receiving federally administered payments, December 2000

State	Total	Blind	Disabled
Total .....	846,784	6,710	840,074
Alabama.....	23,699	60	23,639
Alaska .....	926	11	915
Arizona.....	12,174	111	12,063
Arkansas.....	13,624	87	13,537
California.....	82,169	1,726	80,443
Colorado .....	6,682	40	6,642
Connecticut.....	5,531	57	5,474
Delaware.....	2,509	9	2,500
District of Columbia.....	3,227	10	3,217
Florida.....	64,463	218	64,245
Georgia.....	26,932	226	26,706
Hawaii.....	1,169	18	1,151
Idaho.....	3,145	33	3,112
Illinois.....	38,345	158	38,187
Indiana.....	16,708	119	16,589
Iowa.....	5,552	94	5,458
Kansas.....	5,994	39	5,955
Kentucky.....	22,676	64	22,612
Louisiana.....	27,105	126	26,979
Maine.....	2,859	16	2,843
Maryland.....	13,278	43	13,235
Massachusetts.....	15,739	516	15,223
Michigan.....	33,568	134	33,434
Minnesota.....	8,455	81	8,374
Mississippi.....	18,526	44	18,482
Missouri.....	16,122	70	16,052
Montana.....	1,779	9	1,770
Nebraska.....	3,295	24	3,271
Nevada.....	3,844	94	3,750
New Hampshire.....	1,564	18	1,546
New Jersey.....	19,405	59	19,346
New Mexico.....	5,418	41	5,377
New York.....	65,942	189	65,753
North Carolina.....	28,999	176	28,823
North Dakota.....	879	10	869
Ohio.....	40,263	256	40,007
Oklahoma.....	10,041	114	9,927
Oregon.....	6,456	74	6,382
Pennsylvania.....	39,952	165	39,787
Rhode Island.....	3,222	14	3,208
South Carolina.....	16,818	161	16,657
South Dakota.....	1,966	9	1,957
Tennessee.....	20,475	160	20,315
Texas.....	47,665	650	47,015
Utah.....	3,287	38	3,249
Vermont.....	1,198	8	1,190
Virginia.....	19,220	125	19,095
Washington.....	11,244	75	11,169
West Virginia.....	7,334	58	7,276
Wisconsin.....	14,312	65	14,247
Wyoming.....	885	4	881
Other:			
Northern Mariana Islands.....	144	4	140

CONTACT: Arthur Kahn (410) 965-0186 for further information.

Table 7.B9.—Number of federally administered awards, by category and age, 2000

[Based on 10-percent sample]

State	Total	Category			Age		
		Aged	Blind	Disabled	Under 18	18–64	65 or older
Total .....	747,170	116,470	5,830	624,870	144,560	483,170	119,440
Alabama .....	18,030	1,810	30	16,190	3,110	13,100	1,820
Alaska .....	1,650	290	20	1,340	230	1,120	300
Arizona .....	11,500	1,290	120	10,090	2,120	8,030	1,350
Arkansas .....	8,970	800	50	8,120	2,050	6,110	810
California .....	106,030	30,940	1,350	73,740	14,660	59,580	31,790
Colorado .....	5,640	960	60	4,620	960	3,720	960
Connecticut .....	6,370	820	20	5,530	1,220	4,320	830
Delaware .....	2,030	230	...	1,800	500	1,290	240
District of Columbia .....	2,270	200	30	2,040	700	1,370	200
Florida .....	51,550	9,090	260	42,200	13,220	29,030	9,300
Georgia .....	23,910	2,830	130	20,950	4,770	16,250	2,890
Hawaii .....	3,510	1,020	20	2,470	260	2,230	1,020
Idaho .....	2,830	280	30	2,520	570	1,980	280
Illinois .....	26,480	3,240	210	23,030	6,650	16,580	3,250
Indiana .....	11,040	610	110	10,320	3,020	7,400	620
Iowa .....	5,300	450	80	4,770	1,100	3,720	480
Kansas .....	5,050	260	20	4,770	1,100	3,680	270
Kentucky .....	19,070	1,390	100	17,580	3,930	13,700	1,440
Louisiana .....	16,330	1,610	130	14,590	3,990	10,680	1,660
Maine .....	3,950	350	50	3,550	520	3,080	350
Maryland .....	12,490	1,830	50	10,610	2,350	8,280	1,860
Massachusetts .....	18,750	3,020	120	15,610	3,110	12,600	3,040
Michigan .....	22,230	1,850	180	20,200	5,140	15,170	1,920
Minnesota .....	7,910	1,230	70	6,610	1,690	4,980	1,240
Mississippi .....	13,570	1,370	80	12,120	3,220	8,960	1,390
Missouri .....	15,840	1,300	140	14,400	2,860	11,680	1,300
Montana .....	1,820	160	...	1,660	320	1,330	170
Nebraska .....	3,290	370	10	2,910	590	2,330	370
Nevada .....	4,500	660	50	3,790	840	2,990	670
New Hampshire .....	1,830	120	...	1,710	270	1,440	120
New Jersey .....	17,380	3,780	90	13,510	3,080	10,460	3,840
New Mexico .....	5,240	750	40	4,450	920	3,570	750
New York .....	62,950	12,930	160	49,860	10,140	39,170	13,640
North Carolina .....	22,390	2,720	100	19,570	4,290	15,270	2,830
North Dakota .....	960	130	20	810	220	610	130
Ohio .....	23,140	1,660	150	21,330	5,650	15,810	1,680
Oklahoma .....	7,920	770	100	7,050	1,580	5,550	790
Oregon .....	7,000	800	20	6,180	1,140	5,060	800
Pennsylvania .....	34,790	3,740	170	30,880	7,200	23,760	3,830
Rhode Island .....	3,210	430	...	2,780	780	1,980	450
South Carolina .....	12,430	1,150	160	11,120	2,640	8,630	1,160
South Dakota .....	1,630	260	20	1,350	290	1,070	270
Tennessee .....	17,090	1,660	190	15,240	3,370	12,040	1,680
Texas .....	46,830	9,430	790	36,610	8,290	28,880	9,660
Utah .....	2,530	270	10	2,250	670	1,590	270
Vermont .....	1,400	210	20	1,170	250	940	210
Virginia .....	16,170	2,470	120	13,580	3,070	10,590	2,510
Washington .....	14,500	1,550	100	12,850	2,490	10,410	1,600
West Virginia .....	6,620	420	20	6,180	1,080	5,100	440
Wisconsin .....	8,380	870	30	7,480	2,180	5,330	870
Wyoming .....	790	70	...	720	130	590	70
Other:							
Northern Mariana Islands .....	80	20	...	60	30	30	20

CONTACT: Clark Pickett (410) 965-9016 for further information.

## 7.C SSI: Benefit Distributions

Table 7.C1.—Number and percentage distribution of **adult individuals** and **persons under age 18** receiving federal SSI payments, by category and monthly amount, December 2000

Monthly amount	Total	Adult individuals			Blind and disabled, under age 18
		Aged	Blind	Disabled	
Total number .....	5,814,369	955,013	61,892	3,952,985	844,479
Total percent .....	100.0	100.0	100.0	100.0	100.0
Less than \$50.00 .....	9.5	16.0	9.4	9.3	2.4
\$50.00–\$99.99 .....	7.1	12.1	6.6	7.1	1.1
\$100.00–\$149.99 .....	5.5	10.5	5.2	5.1	1.4
\$150.00–\$199.99 .....	4.5	8.3	4.5	4.2	1.6
\$200.00–\$249.99 .....	4.3	6.7	5.1	4.2	1.9
\$250.00–\$299.99 .....	3.3	5.1	3.3	3.1	2.4
\$300.00–\$349.99 .....	7.3	10.6	8.6	6.6	6.4
\$350.00–\$399.99 .....	2.3	1.9	2.3	2.0	4.3
\$400.00–\$449.99 .....	2.2	1.3	1.8	1.7	5.5
\$450.00–\$499.99 .....	2.1	0.9	1.7	1.6	6.3
\$500.00–\$511.99 .....	0.5	0.2	0.4	0.4	1.2
\$512.00 <sup>1</sup> .....	51.5	26.4	51.3	54.6	65.5

<sup>1</sup> Individuals living in their own household with no countable income were eligible for a federal SSI payment of \$512 in Calendar Year 2000.

Table 7.C2.—Number and percentage distribution of **couples** receiving federal SSI payments, by category and monthly amount, December 2000

Monthly amount	Total	Aged	Blind	Disabled
Total number .....	253,023	120,624	2,733	129,666
Total percent .....	100.0	100.0	100.0	100.0
Less than \$50.00 .....	4.7	5.2	3.8	4.3
\$50.00–\$99.99 .....	5.2	5.5	3.9	4.9
\$100.00–\$149.99 .....	5.2	5.2	4.6	5.2
\$150.00–\$199.99 .....	5.1	5.0	4.3	5.2
\$200.00–\$249.99 .....	4.6	4.2	4.3	5.0
\$250.00–\$299.99 .....	4.3	3.4	4.3	5.2
\$300.00–\$349.99 .....	4.0	2.8	4.2	5.1
\$350.00–\$399.99 .....	3.2	2.6	3.9	3.7
\$400.00–\$449.99 .....	2.5	2.2	2.8	2.7
\$450.00–\$499.99 .....	2.1	1.8	2.0	2.4
\$500.00–\$549.99 .....	6.2	9.8	4.7	2.9
\$550.00–\$599.99 .....	1.5	1.3	1.9	1.8
\$600.00–\$649.99 .....	1.2	1.1	1.7	1.3
\$650.00–\$699.99 .....	1.2	1.3	1.1	1.1
\$700.00–\$749.99 .....	1.1	1.3	0.8	0.8
\$750.00–\$768.99 .....	0.3	0.4	0.5	0.3
\$769.00 <sup>1</sup> .....	47.5	47.0	51.2	47.9

<sup>1</sup> Couples living in their own household with no countable income were eligible for a federal SSI payment of \$769 in Calendar Year 2000.

CONTACT: Arthur Kahn (410) 965-0186 for further information.



Table 7.D1.—Persons receiving both federally administered payments and other income, average monthly amount of income, by source, category, and age, December 2000 <sup>1</sup>

Source of income	Category				Age		
	Total	Aged	Blind	Disabled	Under 18	18–64	65 or older <sup>2</sup>
Total number.....	6,601,686	1,289,339	78,511	5,233,836	846,784	3,744,022	2,010,880
Number with income							
Social Security benefits.....	2,383,275	762,410	27,060	1,593,805	61,268	1,133,537	1,188,470
Other unearned income.....	769,756	241,550	8,819	519,387	146,296	306,723	316,737
Earned income.....	293,500	19,816	5,568	268,116	3,704	259,708	30,088
Percent with income							
Social Security benefits.....	36.1	59.1	34.5	30.5	7.2	30.3	59.1
Other unearned income.....	11.7	18.7	11.2	9.9	17.3	8.2	15.8
Earned income.....	4.4	1.5	7.1	5.1	0.4	6.9	1.5
Average monthly income							
Social Security benefits.....	\$399.44	\$398.87	\$412.92	\$399.49	\$181.85	\$416.84	\$394.07
Other unearned income.....	128.23	99.88	114.24	141.65	188.02	129.11	99.76
Earned income.....	308.59	278.18	546.96	305.89	363.49	316.98	229.42

<sup>1</sup> See the section SSI: History of Provisions for discussion of income.<sup>2</sup> Includes approximately 18,800 blind and 702,700 disabled persons aged 65 or older.

7.D SSI: Other Income Sources

Table 7.D2.—Percent of persons receiving both federally administered payments and Social Security benefits, average monthly amount of benefits, by category, age, and state, December 2000

State	Percent with Social Security benefits							Average monthly Social Security benefit							
	Total	Category			Age			Total	Category				Age		
		Aged	Blind	Dis-abled	Under 18	18–64	65 or older		Aged	Blind	Disabled	Under 18	18–64	65 or older	
Total <sup>1</sup> .....	36.1	59.1	34.5	30.5	7.2	30.3	59.1	\$399.44	\$398.87	\$412.92	\$399.49	\$181.85	\$416.84	\$394.07	
Alabama.....	43.6	87.0	42.4	34.9	9.8	34.3	80.3	380.60	384.75	369.89	378.62	176.18	399.15	377.71	
Alaska.....	31.1	43.0	35.0	28.5	6.9	29.9	44.8	376.52	330.05	367.65	391.12	156.77	411.57	328.97	
Arizona.....	33.6	61.2	25.4	28.3	7.0	28.2	60.2	368.64	355.25	345.45	374.64	174.64	399.24	350.10	
Arkansas.....	45.6	89.7	36.7	36.8	9.9	36.3	83.3	381.97	394.30	360.92	376.17	176.89	394.90	384.74	
California.....	37.5	46.5	36.6	33.3	5.4	32.4	48.6	456.77	434.65	486.83	469.86	212.15	486.79	439.20	
Colorado.....	36.6	58.2	28.6	32.3	7.1	32.7	59.8	385.35	386.22	373.03	385.16	179.35	399.34	378.89	
Connecticut.....	30.7	44.4	24.9	28.3	7.9	28.2	47.4	376.62	360.30	347.46	381.37	168.94	396.63	361.85	
Delaware.....	34.6	68.6	33.3	30.1	7.3	33.0	67.0	400.51	398.41	383.82	401.35	185.40	422.44	393.93	
District of Columbia.....	28.3	66.8	26.3	22.8	5.9	20.6	61.5	380.95	376.74	394.40	382.57	212.67	405.33	371.74	
Florida.....	34.8	52.4	32.6	28.8	7.8	31.6	52.1	375.15	370.34	373.46	378.11	182.08	399.85	368.97	
Georgia.....	41.6	78.3	34.6	33.8	7.3	32.5	74.1	388.70	393.95	371.20	386.38	188.46	403.36	385.65	
Hawaii.....	31.6	38.5	28.6	28.1	5.0	27.4	40.3	405.71	374.02	456.54	427.20	196.69	444.91	376.51	
Idaho.....	36.8	80.0	29.7	32.1	7.9	34.3	77.2	385.01	397.48	376.59	381.59	170.47	394.25	391.37	
Illinois.....	23.7	41.9	24.3	20.9	5.8	20.7	43.4	371.61	369.19	370.16	372.36	178.77	387.95	368.17	
Indiana.....	32.6	76.0	30.2	28.6	7.3	30.9	70.7	377.73	390.00	379.24	374.73	164.26	389.38	383.38	
Iowa.....	39.6	74.3	40.0	35.2	7.6	36.9	72.3	394.48	404.19	379.91	392.25	164.69	402.99	396.68	
Kansas.....	36.3	67.2	30.3	32.7	8.3	34.9	65.3	385.81	395.89	357.07	383.68	168.53	397.75	388.10	
Kentucky.....	35.9	83.9	33.6	30.1	9.4	28.3	75.1	369.91	378.24	351.14	367.29	162.77	384.81	368.50	
Louisiana.....	36.2	81.1	35.5	28.2	7.8	26.9	74.0	368.31	377.63	354.23	363.83	186.99	380.93	370.28	
Maine.....	45.4	88.0	42.3	40.1	12.1	39.1	82.8	393.24	410.38	377.84	388.64	146.90	399.79	399.66	
Maryland.....	29.5	47.3	30.1	25.6	6.2	25.7	49.6	383.14	377.14	390.79	385.48	207.01	402.21	375.06	
Massachusetts.....	38.4	59.7	42.2	29.9	9.5	32.9	58.8	441.10	445.55	459.59	436.69	181.79	448.29	446.14	
Michigan.....	30.2	60.3	31.0	27.0	7.1	27.5	60.8	396.59	402.53	388.65	395.32	174.91	409.71	397.75	
Minnesota.....	33.1	54.9	26.6	29.0	6.6	30.8	53.6	378.64	384.33	353.01	376.90	169.05	387.99	378.79	
Mississippi.....	44.6	88.7	41.6	35.2	9.4	33.8	80.6	375.05	381.56	357.22	371.79	175.36	392.64	372.74	
Missouri.....	38.6	77.9	37.1	33.4	8.6	34.0	73.1	379.59	391.44	371.32	376.06	165.27	390.36	381.46	
Montana.....	39.6	80.3	36.0	35.2	7.9	35.7	76.5	392.48	402.39	345.13	390.52	180.65	403.32	388.66	
Nebraska.....	40.4	74.6	35.6	36.0	7.8	38.9	70.9	394.05	403.06	369.92	391.97	166.47	405.63	392.94	
Nevada.....	34.5	60.3	36.3	24.4	5.7	29.5	59.6	421.29	426.12	447.64	415.18	183.20	429.06	425.71	
New Hampshire.....	38.1	69.7	33.6	35.2	12.0	36.0	69.4	390.47	375.34	370.65	393.57	151.14	410.39	380.03	
New Jersey.....	32.9	43.9	35.6	29.5	7.2	30.4	46.6	400.51	389.14	394.44	405.75	201.63	423.47	389.45	
New Mexico.....	40.1	73.5	30.2	32.2	7.1	30.0	69.2	365.83	360.33	353.90	369.02	195.23	388.01	355.56	
New York.....	31.9	45.5	36.7	27.8	6.4	26.9	47.0	426.41	417.95	424.79	430.48	187.03	453.75	412.45	
North Carolina.....	45.6	85.4	36.2	37.0	8.5	37.1	79.0	380.49	387.88	368.19	376.92	177.20	397.41	377.31	
North Dakota.....	46.7	80.9	37.5	39.9	7.4	40.7	74.7	375.85	386.50	307.27	372.29	165.95	382.25	376.22	
Ohio.....	27.0	62.8	27.8	24.2	6.6	24.3	61.2	368.27	378.84	367.66	366.09	168.59	378.67	373.56	
Oklahoma.....	39.0	80.3	31.8	31.7	7.0	31.0	73.9	376.95	389.17	363.19	371.64	185.64	384.73	379.11	
Oregon.....	35.4	57.6	31.4	31.9	6.1	33.2	58.5	390.27	395.20	345.60	389.44	186.38	399.24	387.22	
Pennsylvania.....	32.7	66.5	33.4	27.7	7.2	27.3	63.2	407.47	428.70	399.88	399.94	176.68	416.55	412.85	
Rhode Island.....	40.9	65.7	43.8	35.9	8.1	36.7	64.1	431.11	448.78	404.95	424.94	174.11	439.76	433.82	
South Carolina.....	42.0	86.4	36.6	33.5	7.9	32.8	78.7	377.62	382.06	359.58	375.76	190.16	393.53	375.03	
South Dakota.....	42.3	75.1	35.5	36.1	7.9	38.7	70.4	373.23	400.50	361.10	362.60	153.86	376.86	383.43	
Tennessee.....	40.8	85.4	32.4	33.6	8.1	31.9	76.8	378.28	385.68	355.85	375.42	177.18	391.38	375.66	
Texas.....	42.9	69.7	31.8	32.4	5.5	30.5	69.1	368.54	364.38	354.92	372.40	203.34	390.13	360.73	
Utah.....	30.0	50.1	22.2	27.7	5.5	30.4	50.8	378.11	370.63	310.22	380.54	185.03	391.52	367.87	
Vermont.....	50.4	89.0	50.4	44.8	10.5	44.1	83.4	424.73	436.40	400.71	421.66	162.98	433.78	424.64	
Virginia.....	39.1	64.8	33.6	33.3	7.9	33.8	64.4	379.40	384.65	369.57	377.16	173.85	393.70	377.65	
Washington.....	28.9	36.9	27.6	27.6	6.0	28.0	42.1	400.57	392.44	382.51	402.57	181.11	416.36	386.29	
West Virginia.....	32.7	82.4	29.7	28.5	9.7	26.4	70.2	371.75	387.26	358.32	368.09	160.39	381.34	374.12	
Wisconsin.....	35.4	69.5	29.9	30.9	6.7	33.1	66.8	386.38	396.57	382.78	383.41	172.54	394.41	391.95	
Wyoming.....	39.0	82.3	37.7	34.3	8.4	36.5	78.5	387.48	410.34	412.75	381.28	182.82	392.41	398.35	
Other:															
Northern Mariana Islands.....	28.3	51.7	26.3	21.2	0.7	29.0	47.0	265.04	243.05	221.00	283.47	374.00	288.83	240.34	

<sup>1</sup> Includes recipients not distributed by state.

Table 7.E2.—Number and percentage distribution of federally administered **awards**, by sex, age, and category, 2000  
[Based on 10-percent sample]

Age and sex	Total	Adults			Blind and disabled children <sup>1</sup>
		Aged	Blind	Disabled	
All persons					
Total number .....	747,170	116,470	4,910	477,490	148,300
Total percent .....	100.0	100.0	100.0	100.0	100.0
Male .....	49.4	36.1	50.5	48.5	62.7
Female .....	50.6	63.9	49.5	51.5	37.3
Under 5 .....	8.4	...	...	...	42.2
5-9 .....	5.3	...	...	...	26.9
10-14 .....	4.1	...	...	...	20.9
15-17 .....	1.5	...	...	...	7.5
18-21 .....	4.9	...	13.4	6.8	2.6
22-29 .....	5.3	...	10.4	8.2	...
30-39 .....	12.1	...	15.5	18.8	...
40-49 .....	17.2	...	20.8	26.7	...
50-59 .....	19.1	...	25.9	29.6	...
60-64 .....	6.1	...	9.0	10.0	...
65-69 .....	8.8	54.7	1.6	...	...
70-74 .....	3.1	19.5	.4	...	...
75-79 .....	1.9	12.0	1.2	...	...
80 or older .....	2.2	13.8	1.8	...	...
Male					
Total number .....	369,060	42,010	2,480	231,550	93,020
Total percent .....	100.0	100.0	100.0	100.0	100.0
Under 5 .....	10.0	...	...	...	39.8
5-9 .....	7.5	...	...	...	29.7
10-14 .....	5.4	...	...	...	21.4
15-17 .....	1.7	...	...	...	6.8
18-21 .....	5.6	...	13.7	7.9	2.3
22-29 .....	5.7	...	11.7	8.9	...
30-39 .....	11.7	...	18.1	18.5	...
40-49 .....	17.1	...	19.0	27.0	...
50-59 .....	18.1	...	27.0	28.5	...
60-64 .....	5.5	...	6.5	9.2	...
65-69 .....	6.8	57.9	1.2	...	...
70-74 .....	2.4	20.8	.4	...	...
75-79 .....	1.4	12.0	1.2	...	...
80 or older .....	1.1	9.3	1.2	...	...
Female					
Total number .....	378,110	74,460	2,430	245,940	55,280
Total percent .....	100.0	100.0	100.0	100.0	100.0
Under 5 .....	6.7	...	...	...	46.1
5-9 .....	3.2	...	...	...	22.2
10-14 .....	2.9	...	...	...	20.0
15-17 .....	1.3	...	...	...	8.6
18-21 .....	4.2	...	13.2	5.6	3.1
22-29 .....	5.0	...	9.1	7.6	...
30-39 .....	12.5	...	12.8	19.0	...
40-49 .....	17.3	...	22.6	26.3	...
50-59 .....	20.1	...	24.7	30.7	...
60-64 .....	6.6	...	11.5	10.7	...
65-69 .....	10.8	53.0	2.1	...	...
70-74 .....	3.8	18.8	.4	...	...
75-79 .....	2.4	11.9	1.2	...	...
80 or older .....	3.2	16.3	2.5	...	...

<sup>1</sup> Includes students aged 18-21.

**7.E SSI: Recipient Characteristics**

Table 7.E3.—Number and percentage distribution of persons receiving federally administered payments, by sex, age, and category, December 2000

Age and sex	Total	Adults			Blind and disabled, under age 18
		Aged	Blind	Disabled	
All persons					
Total number <sup>1</sup> .....	6,601,686	1,289,339	71,801	4,393,762	846,784
Total percent .....	100.0	100.0	100.0	100.0	100.0
Male .....	41.5	29.0	42.7	40.8	63.7
Female .....	58.5	71.0	57.3	59.2	36.3
Under 5 .....	2.0	...	...	...	15.7
5-9 .....	3.6	...	...	...	28.3
10-14 .....	4.6	...	...	...	36.2
15-17 .....	2.5	...	...	...	19.8
18-21 .....	3.4	...	5.9	5.1	...
22-29 .....	7.0	...	11.1	10.3	...
30-39 .....	11.2	...	15.5	16.6	...
40-49 .....	14.3	...	17.2	21.1	...
50-59 .....	14.0	...	16.1	20.8	...
60-64 .....	6.8	...	7.9	10.1	...
65-69 .....	7.8	15.5	7.3	7.0	...
70-74 .....	7.9	25.2	6.6	4.4	...
75-79 .....	6.5	24.8	4.9	2.4	...
80 or older .....	8.3	34.5	7.3	2.2	...
Male					
Total number .....	2,736,497	374,455	30,660	1,792,241	539,141
Total percent .....	100.0	100.0	100.0	100.0	100.0
Under 5 .....	2.8	...	...	...	14.2
5-9 .....	5.7	...	...	...	28.9
10-14 .....	7.3	...	...	...	37.2
15-17 .....	3.9	...	...	...	19.6
18-21 .....	4.7	...	7.2	7.1	...
22-29 .....	8.8	...	13.9	13.2	...
30-39 .....	12.9	...	18.9	19.4	...
40-49 .....	14.8	...	19.0	22.2	...
50-59 .....	12.4	...	15.1	18.7	...
60-64 .....	5.8	...	7.2	8.8	...
65-69 .....	6.2	18.8	6.1	5.4	...
70-74 .....	6.1	29.4	4.8	3.0	...
75-79 .....	4.3	25.3	3.6	1.3	...
80 or older .....	4.3	26.5	4.2	.9	...
Female					
Total number .....	3,865,189	914,884	41,141	2,601,521	307,643
Total percent .....	100.0	100.0	100.0	100.0	100.0
Under 5 .....	1.5	...	...	...	18.3
5-9 .....	2.2	...	...	...	27.0
10-14 .....	2.7	...	...	...	34.5
15-17 .....	1.6	...	...	...	20.2
18-21 .....	2.5	...	4.9	3.7	...
22-29 .....	5.7	...	9.0	8.3	...
30-39 .....	10.0	...	13.0	14.7	...
40-49 .....	13.9	...	15.9	20.4	...
50-59 .....	15.1	...	16.8	22.2	...
60-64 .....	7.5	...	8.4	11.0	...
65-69 .....	8.9	14.2	8.3	8.1	...
70-74 .....	9.3	23.5	7.9	5.4	...
75-79 .....	8.0	24.6	6.0	3.1	...
80 or older .....	11.1	37.7	9.7	3.1	...

<sup>1</sup> Includes recipients not distributed by sex.

CONTACT: Arthur Kahn (410) 965-0186 for further information.

Table 7.E4.—Number and percentage distribution of persons with **representative payees** receiving federally administered payments, by category and age, December 2000

Category and age	Number			Percentage distribution		
	Total	With representative payee	Without representative payee	Total	With representative payee	Without representative payee
Total .....	6,601,686	2,223,203	4,378,483	100.0	33.7	66.3
Category:						
Aged .....	1,289,339	47,978	1,241,361	100.0	3.7	96.3
Blind .....	78,511	18,375	60,136	100.0	23.4	76.6
Disabled .....	5,233,836	2,156,850	3,076,986	100.0	41.2	58.8
Age:						
Under 18.....	846,784	845,628	1,156	100.0	99.9	.1
18–64.....	3,744,022	1,225,786	2,518,236	100.0	32.7	67.3
65 or older.....	2,010,880	151,789	1,859,091	100.0	7.5	92.5

CONTACT: Arthur Kahn (410) 965-0186 for further information.

Table 7.E5.—Number and percentage distribution of persons receiving federally administered payments, by category, age, and living arrangement, December 2000

Living arrangement <sup>1</sup>	Total	Category			Age		
		Aged	Blind <sup>2</sup>	Disabled <sup>3</sup>	Under 18	18–64	65 or older
Total number .....	6,601,686	1,289,339	78,511	5,233,836	846,784	3,744,022	2,010,880
Total percent .....	100.0	100.0	100.0	100.0	100.0	100.0	100.0
Own household.....	93.8	90.9	92.2	94.5	95.5	94.4	91.9
Another's household.....	4.1	7.1	5.2	3.3	3.0	3.7	5.2
Institutional care covered by Medicaid.....	2.2	2.0	2.6	2.2	1.5	1.9	2.9

<sup>1</sup> As defined for determination of federal SSI payment standards.<sup>2</sup> Includes 18,800 persons aged 65 or older.<sup>3</sup> Includes 702,700 persons aged 65 or older.

CONTACT: Arthur Kahn (410) 965-0186 for further information.

Table 7.E6.—Number of **noncitizens** receiving federally administered payments as a percent of SSI recipients, by category, 1982–2000

December	Total		Aged		Blind and disabled	
	Noncitizens	Percent of total SSI	Noncitizens	Percent of total SSI	Noncitizens	Percent of total SSI
1982 .....	127,900	3.3	91,900	5.9	36,000	1.6
1985 .....	210,800	5.1	146,500	9.7	64,300	2.4
1986 .....	244,300	5.7	165,300	11.2	79,000	2.8
1987 .....	282,500	6.4	188,000	12.9	94,500	3.2
1988 .....	320,300	7.2	213,900	14.9	106,400	3.5
1989 .....	370,300	8.1	245,700	17.1	124,600	4.0
1990 .....	435,600	9.0	282,400	19.4	153,200	4.6
1991 .....	519,660	10.2	329,690	22.5	189,970	5.2
1992 .....	601,430	10.8	372,930	25.4	228,500	5.6
1993 .....	683,150	11.4	416,420	28.2	266,730	5.9
1994 .....	738,140	11.7	440,000	30.0	298,140	6.2
1995 .....	785,410	12.1	459,220	31.8	326,190	6.3
1996 .....	724,990	11.0	417,360	29.5	307,630	5.9
1997 .....	650,830	10.0	367,200	27.0	283,630	5.5
1998 .....	669,630	10.2	364,980	27.4	304,650	5.8
1999 .....	684,930	10.4	368,330	28.2	316,600	6.0
2000 .....	692,590	10.5	364,470	28.3	328,120	6.2

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

**7.F SSI: Disability**

**Table 7.F1.—Number and percentage distribution of blind and disabled persons under age 65 receiving federally administered payments and not transferred from prior state programs, by diagnostic group, December 2000**

Diagnostic group	Number				Percentage distribution			
	Total	Aged 18–64		Under age 18, blind and disabled	Total	Aged 18–64		Under age 18, blind and disabled
		Blind	Disabled			Blind	Disabled	
Total .....	4,590,806	51,019	3,693,003	846,784	...	...	...	...
Diagnosis available .....	4,130,574	43,268	3,277,781	809,525	100.0	100.0	100.0	100.0
Infectious and parasitic diseases .....	73,510	127	70,402	2,981	1.8	.3	2.1	.4
Neoplasms .....	51,491	91	42,355	9,045	1.2	.2	1.3	1.1
Endocrine, nutritional, and metabolic diseases .....	178,184	562	171,197	6,425	4.3	1.3	5.2	.8
Diseases of blood and blood-forming organs .....	26,002	9	13,580	12,413	.6	(1)	.4	1.5
Mental disorders (other than mental retardation) <sup>2</sup> .....	1,419,469	399	1,160,250	258,820	34.4	.9	35.4	32.0
Mental retardation .....	1,059,769	848	792,772	266,149	25.7	2.0	24.2	32.9
Diseases of the—								
Nervous system and sense organs .....	371,211	39,419	237,929	93,863	9.0	91.1	7.3	11.6
Circulatory system .....	188,069	777	182,952	4,340	4.6	1.8	5.6	.5
Respiratory system .....	107,490	43	82,528	24,919	2.6	.1	2.5	3.1
Digestive system .....	34,017	18	30,380	3,619	.8	(1)	.9	.4
Genitourinary system .....	42,280	152	39,638	2,490	1.0	.4	1.2	.3
Skin and subcutaneous tissue .....	6,385	20	5,503	862	.2	(1)	.2	.1
Musculoskeletal system .....	334,879	155	326,964	7,760	8.1	.4	10.0	1.0
Congenital anomalies .....	58,593	385	15,498	42,710	1.4	.9	.5	5.3
Injuries .....	100,046	183	95,217	4,646	2.4	.4	2.9	.6
Other .....	79,179	80	10,616	68,483	1.9	.2	.3	8.5

<sup>1</sup> Less than 0.05 percent.

<sup>2</sup> Beginning in 2000, approximately 60,000 persons previously shown under "Other" are now shown under "Mental disorders (other than mental retardation)".

Table 7.F2.—Number and percentage distribution of **blind and disabled persons under age 65** receiving federally administered payments, by diagnostic group, age, and sex, December 2000

Diagnostic group	Total	Age								
		Under 5	5–12	13–17	18–21	22–29	30–39	40–49	50–59	60–64
Total										
Total .....	4,590,806	132,860	424,321	289,603	226,792	461,731	741,315	941,481	925,044	447,659
Diagnosis available, number .....	4,130,574	123,515	404,943	281,067	221,005	432,575	671,816	821,644	788,622	385,387
Diagnosis available, percentage distribution ...	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0
Infectious and parasitic diseases .....	1.8	.3	.5	.2	.2	.8	3.1	3.3	1.8	1.1
Neoplasms .....	1.2	1.6	1.2	.8	.9	.8	.7	1.2	1.8	2.0
Endocrine, nutritional, and metabolic diseases .....	4.3	1.3	.7	.7	.8	1.6	3.1	5.7	8.2	7.9
Diseases of blood and blood-forming organs .....	.6	1.6	1.7	1.3	1.2	.9	.5	.3	.2	.2
Mental disorders (other than mental retardation) <sup>1</sup> .....	34.4	16.9	36.1	32.7	24.4	29.1	38.0	44.4	34.2	23.5
Mental retardation .....	25.7	7.8	31.2	46.4	49.9	45.7	33.0	18.6	10.7	6.9
Diseases of the—										
Nervous system and sense organs .....	9.0	12.0	12.6	10.0	14.4	12.0	9.2	7.1	6.4	6.1
Circulatory system .....	4.6	1.3	.5	.3	.6	.9	1.5	3.5	9.9	16.0
Respiratory system .....	2.6	7.2	3.0	1.4	.7	.6	.8	1.7	4.5	6.1
Digestive system .....	.8	1.5	.3	.2	.2	.3	.6	1.2	1.3	1.1
Genitourinary system .....	1.0	.4	.3	.3	.7	1.1	1.3	1.4	1.2	.9
Skin and subcutaneous tissue .....	.2	.2	.1	.1	.1	.1	.2	.2	.2	.2
Musculoskeletal system .....	8.1	.9	.9	1.1	1.2	1.9	4.1	7.9	16.4	24.5
Congenital anomalies .....	1.4	14.0	4.7	2.2	1.9	1.2	.5	.2	.1	.1
Injuries .....	2.4	.8	.5	.5	1.8	2.7	3.1	2.9	2.9	3.2
Other .....	1.9	32.3	5.7	1.9	.9	.4	.3	.3	.3	.2
Male										
Total .....	2,166,214	76,607	278,006	184,542	129,291	241,667	353,127	403,775	339,894	159,305
Diagnosis available, number .....	1,951,874	71,380	265,856	179,052	126,045	226,362	320,264	347,403	281,131	134,381
Diagnosis available, percentage distribution ...	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0
Infectious and parasitic diseases .....	2.2	.3	.4	.2	.2	.8	4.0	4.7	2.8	1.5
Neoplasms .....	1.1	1.5	1.0	.7	.9	.7	.6	1.0	1.9	2.2
Endocrine, nutritional, and metabolic diseases .....	2.1	1.2	.6	.5	.7	1.2	1.9	2.9	4.1	4.3
Diseases of blood and blood-forming organs .....	.7	1.6	1.5	1.1	1.0	.8	.4	.2	.1	.1
Mental disorders (other than mental retardation) <sup>1</sup> .....	35.0	19.9	41.4	37.8	26.7	30.2	37.3	44.0	31.8	20.8
Mental retardation .....	28.5	8.5	30.0	44.0	49.0	45.2	34.7	20.5	12.4	8.1
Diseases of the—										
Nervous system and sense organs .....	9.1	11.7	10.7	8.7	13.9	11.9	9.1	6.9	6.5	6.5
Circulatory system .....	4.3	1.2	.4	.2	.6	.8	1.5	3.8	12.5	19.6
Respiratory system .....	2.3	8.0	2.9	1.4	.6	.4	.5	1.1	4.3	6.8
Digestive system .....	.8	1.5	.2	.2	.2	.3	.5	1.4	1.7	1.4
Genitourinary system .....	1.0	.4	.3	.3	.6	1.1	1.3	1.6	1.5	1.0
Skin and subcutaneous tissue .....	.1	.1	.1	.1	.1	.1	.1	.1	.2	.2
Musculoskeletal system .....	5.9	.8	.7	.7	.8	1.3	3.2	7.0	15.2	22.5
Congenital anomalies .....	1.5	12.9	3.8	1.8	1.7	1.1	.5	.2	.1	.1
Injuries .....	3.1	.8	.5	.5	2.1	3.7	4.3	4.2	4.5	4.7
Other .....	2.2	29.4	5.4	1.8	.9	.5	.3	.3	.3	.2
Female										
Total .....	2,424,592	56,253	146,315	105,061	97,501	220,064	388,188	537,706	585,150	288,354
Diagnosis available, number .....	2,178,700	52,135	139,087	102,015	94,960	206,213	351,552	474,241	507,491	251,006
Diagnosis available, percentage distribution ...	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0
Infectious and parasitic diseases .....	1.4	.3	.7	.3	.3	.9	2.3	2.2	1.3	.9
Neoplasms .....	1.4	1.7	1.6	.9	.9	.8	.9	1.4	1.8	1.9
Endocrine, nutritional, and metabolic diseases .....	6.3	1.3	1.0	.9	1.0	2.0	4.3	7.9	10.4	9.8
Diseases of blood and blood-forming organs .....	.6	1.6	2.1	1.6	1.4	1.0	.5	.3	.2	.2
Mental disorders (other than mental retardation) <sup>1</sup> .....	33.8	12.7	25.8	23.7	21.3	27.8	38.7	44.7	35.5	25.0
Mental retardation .....	23.1	6.8	33.3	50.6	51.2	46.2	31.5	17.2	9.7	6.3
Diseases of the—										
Nervous system and sense organs .....	8.9	12.4	16.2	12.1	15.1	12.0	9.2	7.2	6.3	5.9
Circulatory system .....	4.8	1.5	.6	.4	.7	.9	1.5	3.3	8.4	14.0
Respiratory system .....	2.9	6.1	3.1	1.5	.8	.8	1.2	2.2	4.5	5.7
Digestive system .....	.8	1.6	.4	.3	.3	.4	.7	1.1	1.0	.9
Genitourinary system .....	1.0	.3	.3	.4	.8	1.1	1.3	1.2	1.1	.9
Skin and subcutaneous tissue .....	.2	.2	.2	.1	.1	.2	.2	.2	.2	.2
Musculoskeletal system .....	10.1	.9	1.3	1.7	1.7	2.4	4.9	8.6	17.1	25.5
Congenital anomalies .....	1.3	15.5	6.5	3.0	2.1	1.3	.6	.2	.1	.1
Injuries .....	1.8	.8	.7	.5	1.3	1.7	2.0	1.9	2.0	2.4
Other .....	1.6	36.2	6.4	2.0	.9	.4	.2	.3	.3	.2

<sup>1</sup> Beginning in 2000, approximately 60,000 persons previously shown under "Other" are now shown under "Mental disorders (other than mental retardation)".

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

## 7.F SSI: Disability

Table 7.F3.—Number of persons receiving special Supplemental Security Income payments and extended Medicaid coverage, for selected months, 1982–2000

Reporting month	Special SSI cash payments (section 1619(a))		Continuation of Medicaid coverage only (section 1619(b)) <sup>1</sup>	
	Number	Percentage change over prior report month	Number	Percentage change over prior report month
December: <sup>2</sup>				
1982 .....	287	...	5,515	...
1983 .....	392	...	5,165	...
1987 .....	14,559	...	15,632	...
1988 .....	19,920	36.8	15,625	...
1989 .....	25,655	28.8	18,254	16.8
1990 .....	13,994	-45.5	23,517	28.8
1991 .....	15,531	11.0	27,264	15.9
1992 .....	17,603	13.3	31,649	16.1
1993 .....	20,028	13.8	35,299	11.5
1994 .....	24,315	21.4	40,683	15.3
1995 .....	28,060	15.4	47,002	15.5
1996 .....	31,085	10.8	51,905	10.4
1997 .....	34,673	11.5	57,089	10.0
1998 .....	37,271	7.5	59,542	4.3
1999 .....	25,528	-31.5	69,265	16.3
2000 .....	27,542	7.9	83,572	20.7
1998				
March .....	34,637	-1	54,639	-4.3
June .....	35,528	2.6	55,761	2.1
September .....	37,216	4.8	58,183	4.3
December .....	37,271	.1	59,542	2.3
1999				
March .....	39,457	5.9	63,431	6.5
June .....	23,304	-40.9	66,939	5.5
September .....	23,914	2.6	70,580	5.4
December .....	25,528	6.7	69,265	-1.9
2000				
March .....	25,055	-1.9	69,545	.4
June .....	25,837	3.1	77,782	11.8
September .....	26,180	1.3	84,199	8.2
December .....	27,542	5.2	83,572	-7

<sup>1</sup> Includes blind participants. For December 2000, of the 83,572 participants, 1,488 were blind.

<sup>2</sup> Data not available for December 1984, 1985, 1986.

Note: In January 1990, the SGA level was raised from \$300 to \$500 and section 1619(a) participants with earnings below \$500 became eligible for regular SSI benefits rather than the special cash payments under section 1619(a). This is reflected in the decrease shown for 1990. In July 1999, the SGA level was further increased to \$700, resulting in the decrease shown for June 1999.



Table 7.F4.—Number of persons receiving special Supplemental Security Income payments and extended Medicaid coverage, by age, sex, and types of earned and unearned income, December 2000

Selected characteristics	Special SSI cash payments (section 1619(a))		Continuation of Medicaid coverage only (section 1619(b))	
	Number	Average earnings	Number	Average earnings
Total .....	27,542	\$945	83,572	\$1,048
Age:				
Under 18 .....	282	880	356	(1)
18–21 .....	2,849	912	3,469	1,154
22–29 .....	8,881	939	21,307	1,162
30–39 .....	7,753	954	26,515	1,016
40–49 .....	5,074	958	18,712	1,007
50–59 .....	2,185	957	8,577	997
60–64 .....	391	966	2,521	887
65 or older .....	127	928	2,115	794
Sex:				
Male .....	15,132	953	45,082	1,076
Female .....	12,410	936	38,490	1,015
Earned income: <sup>2</sup>				
Wages .....	27,147	946	81,855	1,050
Self-employment .....	542	908	2,350	1,039
Earnings level:				
Less than \$400.00 .....	...	...	11,500	268
\$400.00–\$499.00 .....	...	...	7,286	437
\$500.00–\$599.00 .....	...	...	7,852	528
\$600.00–\$699.00 .....	...	...	6,662	631
\$700.00–\$899.00 .....	11,679	795	8,263	778
\$900.00–\$1,199.00 .....	13,681	1,009	9,708	1,034
\$1,200.00 or more .....	2,181	1,354	32,301	1,749
Unearned income: <sup>2</sup>				
None .....	24,385	949	30,452	1,528
Social Security .....	867	861	48,802	714
Other pensions .....	45	894	639	892
Assistance based on need .....	4	828	28	1,191
Interest, dividends, etc .....	1,687	951	5,525	923
Other .....	695	893	3,850	1,140

<sup>1</sup> Data not available.<sup>2</sup> Persons with more than one type are shown under each type.

## 7.F SSI: Disability

Table 7.F5.—Number of persons receiving special Supplemental Security Income payments and extended Medicaid coverage and average monthly earnings, by state, December 2000

State	Special SSI cash payments (section 1619(a))		Continuation of Medicaid coverage only (section 1619(b))	
	Number	Average earnings	Number	Average earnings
Total .....	27,542	\$945	83,572	\$1,048
Alabama.....	379	922	928	1,133
Alaska <sup>1</sup> .....	45	940	142	1,001
Arizona.....	304	931	966	1,063
Arkansas.....	264	924	862	989
California.....	4,525	1,039	7,267	1,295
Colorado.....	316	929	1,167	1,045
Connecticut <sup>1</sup> .....	248	899	1,172	916
Delaware.....	74	915	304	1,082
District of Columbia.....	80	941	243	1,209
Florida.....	1,181	907	3,423	1,047
Georgia.....	631	902	1,956	1,017
Hawaii <sup>1</sup> .....	47	885	136	978
Idaho <sup>1</sup> .....	131	910	488	904
Illinois <sup>1</sup> .....	1,236	915	3,489	1,079
Indiana <sup>1</sup> .....	493	923	1,884	924
Iowa.....	370	922	1,731	760
Kansas <sup>1</sup> .....	252	919	1,031	890
Kentucky.....	423	923	1,338	1,237
Louisiana.....	588	910	1,503	993
Maine.....	158	969	678	966
Maryland.....	402	931	1,372	1,098
Massachusetts.....	1,019	963	3,534	1,159
Michigan.....	1,184	930	4,317	1,054
Minnesota <sup>1</sup> .....	495	902	2,648	938
Mississippi.....	323	916	1,025	1,137
Missouri <sup>1</sup> .....	477	914	1,633	840
Montana.....	83	899	403	793
Nebraska <sup>1</sup> .....	171	925	629	876
Nevada <sup>1</sup> .....	113	935	354	1,091
New Hampshire <sup>1</sup> .....	92	932	441	956
New Jersey.....	537	936	1,826	1,139
New Mexico.....	147	910	496	966
New York.....	2,391	957	6,064	1,185
North Carolina.....	533	922	1,993	999
North Dakota <sup>1</sup> .....	59	908	309	810
Ohio <sup>1</sup> .....	1,440	918	4,104	1,027
Oklahoma <sup>1</sup> .....	215	921	769	913
Oregon <sup>1</sup> .....	199	924	1,106	893
Pennsylvania.....	1,303	933	3,700	980
Rhode Island.....	110	966	441	1,034
South Carolina.....	349	918	1,092	977
South Dakota.....	100	909	508	813
Tennessee.....	515	922	1,732	1,132
Texas.....	1,179	913	3,898	990
Utah <sup>1</sup> .....	143	916	463	896
Vermont.....	127	992	360	982
Virginia <sup>1</sup> .....	575	926	1,666	980
Washington.....	698	937	2,221	1,082
West Virginia.....	144	929	490	1,166
Wisconsin.....	617	923	3,049	920
Wyoming.....	51	921	215	753
Other:				
Northern Mariana Islands.....	6	909	6	779

<sup>1</sup> Initial Medicaid determinations are made by the state after identification of potentially eligible persons by the Social Security Administration.

CONTACT: Clark Pickett (410) 965-9016 for further information.

Table 8.A1.—Hospital Insurance, 1966–2000

[Amounts in millions]

Calendar year	Receipts								Expenditures				Trust fund assets at end of year
	Total	Payroll taxes	Income from taxation of benefits	Transfers from Railroad Retirement account	Reimbursements from general revenues for—		Premiums from voluntary enrollees	Interest on investments and other income <sup>1</sup>	Total	Benefit payments <sup>2</sup>	Administrative expenses		
					Uninsured persons	Military wage credits					Amount <sup>3</sup>	Percentage of benefit payments	
1966.....	\$1,943	\$1,858	...	\$16	\$26	\$11	...	\$32	\$999	\$891	\$108	12.1	\$944
1967.....	3,559	3,152	...	44	301	11	...	51	3,430	3,353	77	2.3	1,073
1968.....	5,287	4,116	...	54	1,022	22	...	74	4,277	4,179	99	2.4	2,083
1969.....	5,279	4,473	...	64	617	11	...	113	4,857	4,739	118	2.5	2,505
1970.....	5,979	4,881	...	66	863	11	...	158	5,281	5,124	157	3.1	3,202
1971.....	5,732	4,921	...	66	503	48	...	193	5,900	5,751	150	2.6	3,034
1972.....	6,403	5,731	...	63	381	48	...	180	6,503	6,318	185	2.9	2,935
1973.....	10,821	9,944	...	99	451	48	\$2	278	7,289	7,057	232	3.3	6,467
1974.....	12,024	10,844	...	132	471	48	5	523	9,372	9,099	272	3.0	9,119
1975.....	12,980	11,502	...	138	621	48	7	664	11,581	11,315	266	2.4	10,517
1976.....	13,766	12,727	...	143	(4)	141	9	746	13,679	13,340	339	2.5	10,605
1977.....	15,856	14,114	...	(5)	<sup>4</sup> 803	<sup>6</sup> 143	12	784	16,019	15,737	283	1.8	10,442
1978.....	19,213	17,324	...	<sup>5</sup> 214	688	141	13	834	18,178	17,682	496	2.8	11,477
1979.....	22,825	20,768	...	191	734	141	16	975	21,073	20,623	450	2.2	13,228
1980.....	26,097	23,848	...	244	697	141	18	1,149	25,577	25,064	512	2.0	13,749
1981.....	35,725	32,959	...	276	659	207	22	1,603	30,726	30,342	384	1.3	18,748
1982.....	37,998	34,586	...	351	808	207	24	2,022	36,144	35,631	513	1.4	<sup>7</sup> 8,164
1983.....	44,570	37,259	...	358	878	<sup>8</sup> 3,456	27	2,593	39,877	39,337	540	1.4	12,858
1984.....	46,720	42,288	...	351	752	250	33	3,046	43,887	43,257	629	1.5	15,691
1985.....	51,397	47,576	...	371	766	<sup>9</sup> -719	41	3,362	48,414	47,580	834	1.8	<sup>7</sup> 20,499
1986.....	59,267	54,583	...	364	566	91	43	3,619	50,422	49,758	664	1.3	<sup>7</sup> 39,957
1987.....	64,064	58,648	...	368	447	94	38	4,469	50,289	49,496	793	1.6	53,732
1988.....	69,239	62,449	...	364	475	80	41	5,830	53,331	52,517	815	1.6	69,640
1989.....	76,721	68,369	...	379	515	86	55	7,317	60,803	60,011	792	1.3	85,558
1990.....	80,372	72,013	...	367	413	<sup>10</sup> -993	122	8,451	66,997	66,239	758	1.1	98,933
1991.....	88,839	77,851	...	352	605	89	432	9,510	72,570	71,549	1,021	1.4	115,202
1992.....	93,836	81,745	...	374	621	86	522	10,487	85,015	83,895	1,121	1.3	124,022
1993.....	98,187	84,133	...	400	367	81	675	<sup>11</sup> 12,531	94,391	93,487	904	1.0	127,818
1994.....	109,570	95,280	\$1,639	413	506	80	907	10,745	104,545	103,282	1,263	1.2	132,844
1995.....	115,027	98,421	3,913	396	462	61	954	10,820	117,604	116,368	1,236	1.1	130,267
1996.....	124,603	110,585	4,069	401	419	<sup>12</sup> -2,293	1,199	10,222	129,929	128,632	1,297	1.0	124,942
1997.....	130,154	114,670	3,558	419	481	70	1,319	9,637	139,452	137,762	1,690	1.2	115,643
1998.....	140,547	124,317	5,067	419	34	67	1,316	9,327	135,771	<sup>13</sup> 133,990	1,782	1.3	120,419
1999.....	151,597	132,306	6,552	430	652	71	1,447	10,139	130,632	<sup>13</sup> 128,766	1,866	1.4	141,385
2000.....	167,185	144,351	8,787	465	470	2	1,382	11,729	131,095	<sup>13</sup> 128,458	2,636	2.1	177,475

<sup>1</sup> Other income includes recoveries of amounts reimbursed from the trust fund which are not obligations of the trust fund, receipts from the fraud and abuse control program, and a small amount of miscellaneous income.

<sup>2</sup> Includes costs of Peer Review Organizations (beginning with the implementation of the Prospective Payment System on Oct. 1, 1983).

<sup>3</sup> Includes costs of experiments and demonstration projects. Beginning in 1997, includes fraud and abuse control expenses, as provided for by P.L. 104–91.

<sup>4</sup> No transfer was made in 1976 because of the change in transfer dates from December to March. The 1977 transfer was for benefits and administrative expenses during the 15-month period beginning July 1976 and ending September 1977.

<sup>5</sup> No transfer was made in 1977 because of the change in transfer dates from August to June. The 1978 transfer was for contributions during the 15-month period beginning July 1976 and ending September 1977.

<sup>6</sup> Includes \$2 million in reimbursements from general revenues for costs arising from the granting of deemed wage credits to persons of Japanese ancestry who were interned during World War II.

<sup>7</sup> For 1982, assets exclude \$12,437 million loaned to the OASI trust fund under the interfund borrowing provisions of the law. Repayments of \$1,824 million and \$10,613 million were made in 1985 and 1986, respectively.

<sup>8</sup> The lump-sum general revenue transfer, as provided for by section 151 of P.L. 98–21.

<sup>9</sup> Includes the lump-sum general revenue adjustment of–\$805 million, as provided for by section 151 of P.L. 98–21.

<sup>10</sup> Includes the lump-sum general revenue adjustment of–\$1,100 million, as provided for by section 151 of P.L. 98–21.

<sup>11</sup> Includes \$1,805 million transfer from the Supplementary Medical Insurance (SMI) catastrophic coverage reserve fund, as provided for by P.L. 102–394.

<sup>12</sup> Includes the lump-sum general revenue adjustment of–\$2,366 million, as provided for by section 151 of P.L. 98–21.

<sup>13</sup> Includes monies transferred to the SMI trust fund for home health agency costs, as provided for by P.L. 105–33.

Note: Totals do not necessarily equal the sums of rounded components.

Source: 2001 Annual Report of the Board of Trustees of the Federal Hospital Insurance Trust Fund, table II.D2, and analogous tables from earlier Annual Reports.

## 8.A Medicare: Trust Funds

Table 8.A2.—Supplementary Medical Insurance, 1966–2000

[Amounts in millions]

Calendar year	Receipts						Expenditures				Balance <sup>1</sup>	
	Total	Premiums from participants			Government contributions <sup>2</sup>	Interest and other income <sup>3</sup>	Total	Benefit payments	Administrative expenses			Trust fund assets at end of year
		Total	Aged	Disabled					Amount	Percentage of benefit payments		
1966.....	\$324	\$322	\$322	...	\$0	\$2	\$203	\$128	\$75	58.6	\$122	
1967.....	1,597	640	640	...	933	24	1,307	1,197	110	9.2	412	
1968.....	1,711	832	832	...	858	21	1,702	1,518	184	12.1	421	
1969.....	1,839	914	914	...	907	18	2,061	1,865	196	10.5	199	
1970.....	2,201	1,096	1,096	...	1,093	12	2,212	1,975	237	12.0	188	
1971.....	2,639	1,302	1,302	...	1,313	24	2,377	2,117	260	12.3	450	
1972.....	2,808	1,382	1,382	...	1,389	37	2,614	2,325	289	12.4	643	
1973.....	3,312	1,550	1,491	\$59	1,705	57	2,844	2,526	318	12.6	1,111	
1974.....	4,124	1,804	1,664	140	2,225	95	3,728	3,318	410	12.4	1,506	
1975.....	4,673	1,918	1,759	158	2,648	107	4,735	4,273	462	10.8	1,444	
1976.....	5,977	2,060	1,878	183	3,810	107	5,622	5,080	542	10.7	1,799	
1977.....	7,805	2,247	2,030	217	5,386	172	6,505	6,038	467	7.7	3,099	
1978.....	9,056	2,470	2,221	248	6,287	299	7,755	7,252	503	6.9	4,400	
1979.....	9,768	2,719	2,451	267	6,645	404	9,265	8,708	557	6.4	4,902	
1980.....	10,874	3,011	2,707	304	7,455	408	11,245	10,635	610	5.7	4,530	
1981.....	15,374	4 3,722	4 3,356	4 366	4 11,291	361	14,028	13,113	915	7.0	5,877	
1982.....	16,580	4 3,697	4 3,341	4 356	4 12,284	599	16,227	15,455	772	5.0	6,230	
1983.....	19,824	4,236	3,845	391	14,861	727	18,984	18,106	878	4.8	7,070	
1984.....	23,180	5,167	4,721	445	17,054	959	20,552	19,661	891	4.5	9,698	
1985.....	25,106	5,613	5,105	508	18,250	1,243	23,880	22,947	933	4.1	10,924	
1986.....	24,665	5,722	5,218	504	17,802	1,141	27,299	26,239	1,060	4.0	8,291	
1987.....	31,844	<sup>5</sup> 7,409	<sup>5</sup> 6,747	<sup>5</sup> 661	<sup>5</sup> 23,560	875	31,740	30,820	920	3.0	8,394	
1988.....	35,825	<sup>5</sup> 8,761	<sup>5</sup> 7,983	<sup>5</sup> 778	<sup>5</sup> 26,203	861	35,230	33,970	1,260	3.7	8,990	
1989.....	<sup>6</sup> 44,349	<sup>6,7</sup> 12,263	9,793	993	30,852	<sup>6</sup> 1,234	<sup>6</sup> 39,783	38,294	<sup>6</sup> 1,489	3.9	<sup>6</sup> 13,556	
1990.....	45,913	11,320	10,311	1,008	33,035	1,558	43,987	42,468	1,519	3.6	15,482	
1991.....	51,224	11,934	10,846	1,088	37,602	1,688	48,877	47,336	1,541	3.3	17,828	
1992.....	57,237	<sup>8</sup> 14,077	<sup>8</sup> 12,814	<sup>8</sup> 1,263	<sup>8</sup> 41,359	1,801	50,830	49,260	1,570	3.2	24,235	
1993.....	57,679	<sup>8</sup> 14,193	<sup>8</sup> 12,731	<sup>8</sup> 1,462	<sup>8</sup> 41,465	2,021	57,784	<sup>9</sup> 55,784	2,000	3.7	24,131	
1994.....	55,607	17,386	15,569	1,817	36,203	2,018	60,317	58,618	1,699	2.9	19,422	
1995.....	60,306	19,717	17,651	2,066	39,007	1,582	66,599	64,972	1,627	2.5	13,130	
1996.....	85,609	18,763	16,654	2,109	65,035	1,811	70,408	68,598	1,810	2.6	28,332	
1997.....	81,924	19,289	17,079	2,210	60,171	2,464	74,124	72,757	1,368	1.9	36,131	
1998.....	87,711	20,933	18,594	2,338	<sup>10</sup> 64,068	2,711	77,630	<sup>11</sup> 76,125	1,505	2.0	46,212	
1999.....	80,902	<sup>10</sup> 18,967	<sup>10</sup> 16,604	<sup>10</sup> 2,362	<sup>10</sup> 59,095	2,841	82,327	<sup>11</sup> 80,724	1,603	2.0	44,787	
2000.....	89,903	<sup>10</sup> 20,555	<sup>10</sup> 17,892	<sup>10</sup> 2,664	<sup>10</sup> 65,898	3,450	90,663	<sup>11</sup> 88,893	1,770	2.0	44,027	

<sup>1</sup> The financial status of the program depends on both the assets and the liabilities of the program.

<sup>2</sup> General fund matching payments, plus certain interest-adjustment items.

<sup>3</sup> Other income includes recoveries of amounts reimbursed from the trust fund that are not obligations of the trust fund and other miscellaneous income.

<sup>4</sup> Section 708 of Title VII of the Social Security Act modified the provisions for the delivery of Social Security benefit checks when the regularly designated delivery day falls on a Saturday, Sunday, or legal public holiday. Delivery of benefit checks normally due January 1982 occurred on Dec. 31, 1981. Consequently, the SMI premiums withheld from the checks (\$264 million) and the associated general revenue contributions (\$883 million) were added to the SMI trust fund on Dec. 31, 1981. These amounts are excluded from the premium income and general revenue income for calendar year 1982.

<sup>5</sup> Delivery of benefit checks normally due January 1988 occurred on Dec. 31, 1987. Consequently, the SMI premiums withheld from the checks (\$692 million) and the associated general revenue contributions (\$2,178 million) were added to the SMI trust fund on Dec. 31, 1987. These amounts are excluded from the premium income and general revenue income for calendar year 1988; see footnote 4.

<sup>6</sup> Includes the impact of the Medicare Catastrophic Coverage Act of 1988 (P.L. 100–360).

<sup>7</sup> Catastrophic coverage premiums—\$1.5 billion—not distributed between aged and disabled enrollees are included in total.

<sup>8</sup> Delivery of benefit checks normally due January 1993 occurred on Dec. 31, 1992. Consequently, the SMI premiums withheld from the checks (\$1,089 million) and the associated general revenue contributions (\$3,175 million) were added to the SMI trust fund on Dec. 31, 1992. These amounts are excluded from the premium income and general revenue income for calendar year 1993; see footnote 4.

<sup>9</sup> Includes the impact of the transfer to the HI trust fund of the SMI catastrophic coverage reserve fund on Mar. 31, 1993, as specified in P.L. 102–394. Actual benefit payments for 1993 were \$53,979 million and the amount transferred was \$1,805 million.

<sup>10</sup> Delivery of benefit checks normally due January 1999 occurred on Dec. 31, 1998. Consequently, the SMI premiums withheld from the checks (\$1,512 million) and the associated general revenue contributions (\$4,711 million) were added to the SMI trust fund on December 31, 1998. These amounts are excluded from the premium income and general revenue income for calendar year 1999; see footnote 4.

<sup>11</sup> Benefit payments less monies transferred from the HI trust fund for home health agency costs, as provided for by P.L. 105–33.

Note: Totals do not necessarily equal the sums of rounded components.

Source: 2001 Annual Report of the Board of Trustees of the Federal Supplementary Medical Insurance Fund, table II.D2, analogous tables from earlier Annual Reports, and unpublished Treasury reports.

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8.B Medicare: Enrollment, Utilization, & Reimbursement

Table 8.B1.—Hospital Insurance and Supplementary Medical Insurance: Aged persons enrolled, served, and amount reimbursed, by type of coverage and service, 1967–1998<sup>1</sup>

Type of coverage and service	1967	1975	1980	1990	1996	1997	1998	Average annual rate change (percent), 1967–98
Persons enrolled (in thousands)								
Hospital Insurance and/or Supplementary Medical Insurance.....	19,521	22,790	25,515	30,948	33,424	33,630	33,802	1.9
Hospital Insurance .....	19,494	22,472	25,104	30,464	33,022	33,237	33,410	1.9
Supplementary Medical Insurance .....	17,893	21,945	24,680	29,685	31,984	32,164	32,308	2.1
Persons served (in thousands)								
Hospital Insurance and/or Supplementary Medical Insurance.....	7,154	12,032	16,271	24,809	27,263	26,587	25,931	4.5
Hospital Insurance .....	3,960	4,963	6,024	6,367	7,139	7,360	6,840	1.9
Inpatient hospital .....	3,601	4,913	5,951	5,906	6,091	6,220	6,074	1.8
Skilled nursing services.....	354	260	248	615	1,321	1,442	1,443	5.0
Home health services <sup>2</sup> .....	126	329	675	1,818	3,290	3,483	<sup>3</sup> 2,641	11.1
Supplementary Medical Insurance.....	6,523	11,762	16,099	24,687	27,113	26,237	25,605	4.8
Physicians' and other medical services.....	6,415	11,396	15,627	24,193	26,432	25,707	25,083	4.8
Outpatient services.....	1,511	3,768	6,629	14,055	17,875	18,093	18,150	9.0
Home health services <sup>2</sup> .....	118	161	302	38	45	47	1,339	8.7
Persons served per 1,000 enrollees								
Hospital Insurance and/or Supplementary Medical Insurance.....	367	528	638	802	816	791	767	2.6
Hospital Insurance .....	203	221	240	209	216	221	205	0
Inpatient hospital .....	185	219	237	94	185	187	182	-0.1
Skilled nursing services.....	18	12	10	21	40	43	43	3.0
Home health services <sup>2</sup> .....	7	15	27	60	100	105	379	8.7
Supplementary Medical Insurance.....	365	536	652	832	848	816	793	2.7
Physicians' and other medical services.....	359	519	633	815	826	799	776	2.7
Outpatient services.....	77	172	269	474	559	563	562	7.1
Home health services <sup>2</sup> .....	7	7	12	1	1	2	41	6.3
Amount reimbursed (in millions)								
Hospital Insurance and/or Supplementary Medical Insurance.....	\$4,239	\$12,689	\$29,134	\$88,778	\$145,322	\$152,772	\$146,355	13.0
Hospital Insurance .....	2,967	9,209	20,353	54,244	95,404	101,027	90,511	12.5
Inpatient hospital .....	2,659	8,840	19,583	48,952	71,191	73,237	71,899	12.0
Skilled nursing services.....	274	233	331	1,886	9,157	10,831	11,074	13.6
Home health services <sup>2</sup> .....	26	136	440	3,406	15,056	16,960	<sup>3</sup> 7,538	24.5
Supplementary Medical Insurance.....	1,272	3,481	8,871	34,533	49,918	51,744	55,844	13.9
Physicians' and other medical services.....	1,224	3,050	7,361	27,379	36,865	38,206	38,685	12.6
Outpatient services.....	38	374	1,261	7,077	12,838	13,319	12,972	22.2
Home health services <sup>2</sup> .....	17	56	159	78	215	219	4,187	20.9
Amount reimbursed per person served								
Hospital Insurance and/or Supplementary Medical Insurance.....	\$592	\$1,055	\$1,791	\$3,578	\$5,330	\$5,746	\$5,644	8.1
Hospital Insurance .....	749	1,855	3,379	8,520	13,363	13,726	13,233	10.4
Inpatient hospital .....	738	1,799	3,291	8,289	11,688	11,774	11,837	10.0
Skilled nursing services.....	774	896	1,336	3,068	6,931	7,511	7,675	8.2
Home health services <sup>2</sup> .....	204	413	652	1,874	4,577	4,869	<sup>3</sup> 2,855	9.5
Supplementary Medical Insurance.....	195	296	545	1,399	1,841	1,972	2,181	8.7
Physicians' and other medical services.....	191	268	471	1,132	1,395	1,486	1,542	7.5
Outpatient services.....	25	99	190	503	718	736	715	12.3
Home health services <sup>2</sup> .....	145	347	526	2,033	4,815	4,606	3,126	11.2
Amount reimbursed per enrollee								
Hospital Insurance and/or Supplementary Medical Insurance.....	\$217	\$557	\$1,142	\$2,869	\$4,348	\$4,543	\$4,330	10.9
Hospital Insurance .....	152	410	811	1,781	2,899	3,040	2,709	10.4
Inpatient hospital .....	137	394	780	1,607	2,156	2,203	2,152	10.0
Skilled nursing services.....	14	11	13	62	277	326	331	11.5
Home health services <sup>2</sup> .....	1	6	18	112	456	510	<sup>3</sup> 226	23.5
Supplementary Medical Insurance.....	71	159	356	1,163	1,561	1,609	1,728	11.6
Physicians' and other medical services.....	69	139	298	922	1,153	1,188	1,197	10.3
Outpatient services.....	2	17	51	238	401	414	402	20.1
Home health services <sup>2</sup> .....	1	2	6	3	7	7	130	18.3

<sup>1</sup> Data for persons enrolled as of July 1 are 100 percent and include Health Maintenance Organization (HMO) beneficiaries. Calendar year utilization for persons served and amounts reimbursed are inflated to represent 100 percent and exclude HMO services.

<sup>2</sup> The Balanced Budget Act of 1997, enacted on Aug. 5, 1997, specified that effective January 1998, coverage for the majority of home health services not associated with a hospital or skilled nursing facility will be transferred from the Hospital Insurance (HI) program to Supplementary Medical Insurance (SMI) program. The HI program will cover the first 100 home health agency visits following a hospital or skilled nursing facility stay of at least 3 days. From July 1981 to December 1997, home health agency services have been almost exclusively provided by the HI program. For more information, refer to the 1998 HI and SMI Trust Fund Reports.

<sup>3</sup> Hospice utilization is combined in the Part A home health services.

## 8.B Medicare: Enrollment, Utilization, & Reimbursement

Table 8.B2.—Hospital Insurance and Supplementary Medical Insurance: Disabled persons enrolled, served, and amount reimbursed, by type of coverage and service, 1974–1998 <sup>1</sup>

Type of coverage and service	1974	1975	1980	1990	1996	1997	1998	Average annual rate change (percent), 1974–1998
Persons enrolled (in thousands)								
Hospital Insurance and/or Supplementary Medical Insurance...	1,928	2,168	3,171	3,255	4,640	4,815	5,023	4.4
Hospital Insurance .....	1,928	2,168	3,171	3,255	4,640	4,815	5,023	4.4
Supplementary Medical Insurance .....	1,745	1,959	2,883	2,943	4,155	4,296	4,472	4.4
Persons served (in thousands)								
Hospital Insurance and/or Supplementary Medical Insurance...	792	975	2,287	2,390	3,476	3,547	3,641	7.2
Hospital Insurance .....	400	475	659	680	964	986	961	4.1
Inpatient hospital .....	397	472	628	644	868	887	899	3.8
Skilled nursing services .....	8	8	23	23	63	73	75	10.7
Home health services <sup>2</sup> .....	15	22	105	122	293	304	<sup>3</sup> 225	13.1
Supplementary Medical Insurance .....	740	924	2,263	2,365	3,442	3,499	3,596	7.5
Physicians' and other medical services .....	691	865	2,159	2,249	3,315	3,363	3,452	7.6
Outpatient services .....	296	399	1,415	1,496	2,407	2,510	2,619	10.4
Home health services <sup>2</sup> .....	9	13	(4)	(4)	(4)	(4)	131	12.9
Persons served per 1,000 enrollees								
Hospital Insurance and/or Supplementary Medical Insurance...	411	450	721	734	749	737	725	2.6
Hospital Insurance .....	208	219	208	209	208	205	191	-0.4
Inpatient hospital .....	206	218	198	198	187	184	179	-0.6
Skilled nursing services .....	4	4	7	7	14	15	15	6.2
Home health services <sup>2</sup> .....	8	10	33	38	63	63	<sup>3</sup> 49	8.6
Supplementary Medical Insurance .....	424	471	785	804	828	814	804	3.0
Physicians' and other medical services .....	396	442	749	764	798	783	772	3.1
Outpatient services .....	170	204	491	508	579	584	586	5.8
Home health services <sup>2</sup> .....	5	7	(4)	(4)	(4)	(4)	29	8.3
Amount reimbursed (in millions)								
Hospital Insurance and/or Supplementary Medical Insurance...	\$1,049	\$1,509	\$10,364	\$11,239	\$22,647	\$23,796	\$23,855	15.3
Hospital Insurance .....	694	987	6,253	6,694	13,790	14,383	13,624	14.5
Inpatient hospital .....	681	968	5,936	6,346	11,848	12,177	12,342	14.1
Skilled nursing services .....	7	9	143	85	464	564	603	22.5
Home health services <sup>2</sup> .....	6	10	173	264	1,478	1,641	<sup>3</sup> 678	28.4
Supplementary Medical Insurance .....	355	522	4,111	4,545	8,858	9,414	10,231	16.5
Physicians' and other medical services .....	206	295	2,623	2,831	5,125	5,474	5,749	16.3
Outpatient services .....	145	221	1,488	1,714	3,733	3,940	3,994	16.3
Home health services <sup>2</sup> .....	3	5	(4)	(4)	(4)	(4)	488	(4)
Amount reimbursed per person served								
Hospital Insurance and/or Supplementary Medical Insurance...	\$1,324	\$1,548	\$4,531	\$4,703	\$6,515	\$6,710	\$6,552	7.5
Hospital Insurance .....	1,735	2,077	9,482	9,847	14,306	14,582	14,170	10.0
Inpatient hospital .....	1,714	2,051	9,455	9,849	13,649	13,731	13,722	9.9
Skilled nursing services .....	936	1,049	6,107	3,702	7,336	7,785	8,066	10.3
Home health services <sup>2</sup> .....	399	478	1,645	2,156	5,052	5,395	<sup>3</sup> 3,014	9.6
Supplementary Medical Insurance .....	479	565	1,817	1,922	2,574	2,691	2,845	8.4
Physicians' and other medical services .....	298	341	1,215	1,259	1,546	1,628	1,666	8.1
Outpatient services .....	490	554	1,051	1,146	1,551	1,569	1,525	5.3
Home health services <sup>2</sup> .....	345	420	230	517	1,235	1,046	3,732	11.4
Amount reimbursed per enrollee								
Hospital Insurance and/or Supplementary Medical Insurance...	\$544	\$696	\$3,268	\$3,453	\$4,881	\$4,942	\$4,749	10.4
Hospital Insurance .....	360	455	1,972	2,057	2,972	2,987	2,712	9.6
Inpatient hospital .....	353	446	1,872	1,950	2,553	2,529	2,457	9.2
Skilled nursing services .....	4	4	45	26	100	117	120	16.7
Home health services <sup>2</sup> .....	3	5	55	81	319	341	<sup>3</sup> 135	18.9
Supplementary Medical Insurance .....	208	266	1,426	1,544	2,132	2,191	2,288	11.5
Physicians' and other medical services .....	118	151	910	962	1,233	1,247	1,285	11.5
Outpatient services .....	83	113	516	582	898	917	893	11.4
Home health services <sup>2</sup> .....	2	3	(4)	(4)	(4)	(4)	109	19.9

<sup>1</sup>Data for persons enrolled as of July 1 are 100 percent and include Health Maintenance Organization (HMO) beneficiaries. Calendar year utilization for persons served and amounts reimbursed are inflated to represent 100 percent and exclude HMO services.

<sup>2</sup>The Balanced Budget Act of 1997, enacted on Aug. 5, 1997, specified that effective January 1998, coverage for the majority of home health services not associated with a hospital or skilled nursing facility will be transferred from the Hospital Insurance (HI) program to Supplementary Medical Insurance (SMI) program. The HI program will cover the first 100 home health agency visits following a hospital or skilled nursing facility stay of at least 3 days. From July 1981 to December 1997, home health agency services have been almost exclusively provided by the HI program. For more information, refer to the 1998 HI and SMI Trust Fund Reports.

<sup>3</sup>Hospice utilization is combined in the Part A home health services.

<sup>4</sup>Sample population too small to yield valid calculated results.

Table 8.B3.—Hospital Insurance and Supplementary Medical Insurance: Number of enrollees, by state, July 1, 1980–2000

[In thousands]

Census division and state	Aged							
	1980	1990	1995	1996	1997	1998	1999	2000
Total .....	25,515	30,948	33,142	38,064	33,630	33,802	33,929	34,347
United States <sup>1</sup> .....	25,027	30,350	32,492	37,269	32,958	33,120	33,240	33,635
New England.....	1,506	1,734	1,816	2,067	1,826	1,827	1,829	1,840
Connecticut.....	362	436	455	457	456	456	456	458
Maine.....	142	165	174	176	177	178	179	181
Massachusetts.....	715	795	825	828	828	827	826	830
New Hampshire.....	103	126	139	140	142	143	145	147
Rhode Island.....	125	145	149	149	149	148	148	148
Vermont.....	59	68	72	73	74	74	75	76
Middle Atlantic.....	4,496	5,084	5,267	5,903	5,262	5,259	5,264	5,276
New Jersey.....	851	1,006	1,058	1,062	1,063	1,064	1,065	1,069
New York.....	2,128	2,280	2,328	2,325	2,320	2,320	2,334	2,340
Pennsylvania.....	1,516	1,798	1,881	1,883	1,878	1,874	1,865	1,867
East North Central.....	4,462	5,224	5,500	6,261	5,523	5,527	5,526	5,556
Illinois.....	1,238	1,401	1,446	1,444	1,441	1,440	1,437	1,439
Indiana.....	579	685	725	728	730	732	732	737
Michigan.....	916	1,101	1,177	1,183	1,188	1,191	1,194	1,204
Ohio.....	1,162	1,387	1,471	1,475	1,476	1,476	1,474	1,482
Wisconsin.....	567	650	683	686	687	689	689	694
West North Central.....	2,186	2,424	2,510	2,808	2,514	2,515	2,513	2,526
Iowa.....	387	422	432	431	430	429	427	427
Kansas.....	304	337	348	348	348	348	347	348
Minnesota.....	479	544	570	573	575	577	579	584
Missouri.....	639	706	733	734	734	735	734	739
Nebraska.....	205	221	228	228	228	227	227	228
North Dakota.....	81	91	94	94	93	93	93	93
South Dakota.....	91	102	106	106	106	106	106	107
South Atlantic.....	4,179	5,536	6,091	7,070	6,250	6,307	6,330	6,450
Delaware.....	59	80	90	92	93	95	96	98
District of Columbia.....	71	71	70	68	67	67	66	65
Florida.....	1,579	2,174	2,396	2,434	2,460	2,477	2,473	2,513
Georgia.....	499	636	700	710	721	730	736	755
Maryland.....	381	496	542	549	554	559	562	572
North Carolina.....	588	786	878	892	906	917	925	945
South Carolina.....	279	383	428	435	443	449	454	466
Virginia.....	490	645	714	724	733	742	748	764
West Virginia.....	233	264	274	274	273	272	270	272
East South Central.....	1,613	1,887	2,000	2,437	2,028	2,035	2,041	2,071
Alabama.....	428	508	541	546	549	551	553	561
Kentucky.....	402	459	482	484	486	487	488	493
Mississippi.....	280	313	325	327	328	328	328	332
Tennessee.....	503	607	652	659	665	669	672	685
West South Central.....	2,363	2,880	3,120	3,632	3,187	3,211	3,232	3,286
Arkansas.....	303	343	356	357	358	357	358	360
Louisiana.....	380	460	488	491	494	495	495	499
Oklahoma.....	361	412	432	433	434	435	436	440
Texas.....	1,318	1,665	1,845	1,874	1,901	1,924	1,943	1,987
Mountain.....	1,043	1,490	1,726	2,013	1,806	1,839	1,863	1,919
Arizona.....	295	456	536	551	562	573	577	597
Colorado.....	244	324	367	376	383	389	395	404
Idaho.....	95	121	134	136	138	140	142	145
Montana.....	85	106	114	116	116	117	118	119
Nevada.....	65	128	172	180	188	195	200	213
New Mexico.....	114	160	182	186	190	193	196	201
Utah.....	108	147	168	171	174	176	178	183
Wyoming.....	38	47	54	54	55	56	57	57
Pacific.....	3,157	4,082	4,444	5,060	4,548	4,586	4,630	4,704
Alaska.....	11	22	28	29	31	32	33	35
California.....	2,346	2,990	3,241	3,286	3,320	3,348	3,385	3,439
Hawaii.....	74	118	138	141	144	146	148	151
Oregon.....	300	390	422	425	426	428	429	434
Washington.....	426	562	614	622	627	632	635	645
Residence unknown.....	22	10	18	16	15	14	12	5
Outlying areas.....	270	344	383	391	398	404	404	426
Puerto Rico.....	263	337	367	375	381	381	393	403
Virgin Islands.....	4	6	8	8	8	8	9	9
Other.....	3	1	8	8	9	9	2	14
Foreign countries.....	217	254	268	271	275	277	280	286

See footnotes at end of table.

## 8.B Medicare: Enrollment, Utilization, & Reimbursement

Table 8.B3.—Hospital Insurance and Supplementary Medical Insurance: Number of enrollees, by state,  
July 1, 1980–2000—Continued

[In thousands]

Census division and state	Disabled							
	1980 <sup>1</sup>	1990	1995	1996	1997	1998	1999	2000
Total .....	2,963	3,255	4,393	4,640	4,815	5,023	5,212	5,273
United States <sup>2</sup> .....	2,863	3,148	4,266	4,507	4,675	4,878	5,062	5,122
New England.....	141	156	228	243	254	266	277	280
Connecticut.....	31	33	47	49	51	54	56	56
Maine.....	16	18	27	29	31	33	35	36
Massachusetts.....	64	72	108	115	119	124	128	129
New Hampshire.....	9	11	17	19	20	21	22	23
Rhode Island.....	14	14	19	20	21	22	23	23
Vermont.....	7	7	10	11	12	12	13	13
Middle Atlantic.....	493	473	603	633	657	685	713	715
New Jersey.....	91	86	110	115	119	124	130	130
New York.....	237	229	302	319	331	346	360	359
Pennsylvania.....	165	158	190	199	206	215	223	226
East North Central.....	486	561	715	744	758	782	807	809
Illinois.....	113	132	172	179	181	186	192	191
Indiana.....	63	77	99	103	105	109	113	115
Michigan.....	118	132	170	177	181	188	195	197
Ohio.....	141	156	196	203	207	213	219	217
Wisconsin.....	50	64	79	81	83	86	88	89
West North Central.....	180	211	280	295	305	317	328	333
Iowa.....	29	34	43	44	46	47	49	49
Kansas.....	22	26	35	38	39	41	42	43
Minnesota.....	35	44	60	63	64	67	69	70
Missouri.....	67	75	100	106	111	115	120	122
Nebraska.....	14	16	22	23	24	24	25	26
North Dakota.....	6	7	9	9	10	10	10	10
South Dakota.....	7	8	11	12	12	12	13	13
South Atlantic.....	545	607	834	892	940	990	1,034	1,060
Delaware.....	7	8	11	12	12	13	14	14
District of Columbia.....	8	7	8	9	9	9	9	9
Florida.....	147	165	232	251	267	284	298	309
Georgia.....	88	96	134	142	148	155	161	164
Maryland.....	41	46	60	63	66	69	72	74
North Carolina.....	91	106	149	159	168	178	186	191
South Carolina.....	51	59	81	87	92	96	101	103
Virginia.....	68	77	105	111	117	122	128	130
West Virginia.....	43	44	55	58	60	63	65	66
East South Central.....	246	287	397	422	441	462	480	488
Alabama.....	63	74	101	108	113	118	123	125
Kentucky.....	62	75	105	112	117	123	128	130
Mississippi.....	46	53	72	76	80	83	86	87
Tennessee.....	76	85	119	127	132	138	143	146
West South Central.....	288	317	452	477	497	514	528	531
Arkansas.....	45	48	67	70	73	76	78	79
Louisiana.....	63	71	93	97	99	101	103	102
Oklahoma.....	41	39	56	60	63	65	67	68
Texas.....	139	159	236	251	262	272	280	282
Mountain.....	112	148	228	243	255	267	276	281
Arizona.....	34	42	66	71	74	78	81	84
Colorado.....	24	34	54	57	60	62	64	64
Idaho.....	9	11	16	17	18	19	20	21
Montana.....	9	12	16	16	17	17	18	18
Nevada.....	8	13	22	24	26	28	29	30
New Mexico.....	15	19	28	30	31	32	33	33
Utah.....	9	13	20	21	21	22	23	23
Wyoming.....	3	4	7	7	7	8	8	8
Pacific.....	367	388	529	556	569	593	618	624
Alaska.....	2	3	5	6	6	6	7	7
California.....	284	289	392	411	418	435	452	455
Hawaii.....	7	9	11	12	12	13	14	14
Oregon.....	31	34	47	49	51	53	55	57
Washington.....	43	53	74	79	82	86	90	91
Residence unknown.....	4	2	1	1	1	1	1	1
Outlying areas.....	88	93	112	118	124	130	134	137
Puerto Rico.....	88	92	110	116	122	127	132	134
Virgin Islands.....	(2)	1	1	1	1	1	1	1
Other.....	(2)	(2)	(2)	1	1	2	1	2
Foreign countries.....	12	14	14	15	15	15	14	14

<sup>1</sup> Represents beneficiaries of 50 states, District of Columbia and those with residence unknown.

<sup>2</sup> Data not available.

CONTACT: Maria Diacogiannis (410) 786-0178 for further information.



8.B Medicare: Enrollment, Utilization, & Reimbursement

Table 8.B4.—Hospital Insurance and Supplementary Medical Insurance: Number of persons aged 65 or older enrolled, by age, sex, and race, selected years July 1, 1980–1999

[In thousands]

Age, sex, and race	1980	1985	1990	1995	1996	1997	1998	1999
Hospital and Supplementary Medical Insurance								
Total .....	25,515	28,176	30,948	33,142	33,424	33,630	33,802	33,929
Age:								
65–69 .....	8,459	8,956	9,695	9,517	9,445	9,317	9,184	9,077
70–74 .....	6,756	7,441	7,951	8,756	8,745	8,737	8,725	8,656
75–79 .....	4,809	5,453	6,058	6,563	6,749	6,932	7,055	7,232
80–84 .....	3,081	3,463	3,957	4,470	4,554	4,619	4,707	4,735
85 or older .....	2,410	2,861	3,286	3,837	3,930	4,025	4,130	4,229
Sex:								
Men .....	10,268	11,282	12,416	13,434	13,583	13,701	13,806	13,900
Women .....	15,247	16,894	18,532	19,708	19,841	19,929	19,996	20,029
Race:								
White .....	22,534	24,745	26,855	29,011	29,177	29,215	29,288	29,311
All other races .....	2,257	2,585	3,114	3,253	3,374	3,139	3,259	4,431
Unknown .....	724	846	979	878	873	1,276	1,255	187
Hospital Insurance								
Total .....	25,104	27,683	30,464	32,742	33,022	33,237	33,410	33,516
Age:								
65–69 .....	8,302	8,818	9,565	9,411	9,342	9,222	9,093	8,984
70–74 .....	6,592	7,292	7,829	8,652	8,642	8,636	8,626	8,552
75–79 .....	4,731	5,315	5,947	6,483	6,666	6,847	6,968	7,138
80–84 .....	3,072	3,403	3,872	4,409	4,495	4,561	4,649	4,674
85 or older .....	2,407	2,854	3,252	3,787	3,877	3,971	4,074	4,168
Sex:								
Men .....	10,156	11,146	12,280	13,310	13,458	13,579	13,684	13,770
Women .....	14,948	16,536	18,184	19,431	19,563	19,658	19,726	19,746
Race:								
White .....	22,244	24,424	26,591	28,822	28,992	29,036	29,111	29,131
All other races .....	2,160	2,444	2,931	3,127	3,236	3,043	3,151	4,206
Unknown .....	699	815	942	792	793	1,158	1,148	179
Supplementary Medical Insurance								
Total .....	24,680	27,311	29,686	31,742	31,984	32,164	32,308	32,403
Age:								
65–69 .....	8,156	8,607	9,008	8,830	8,742	8,605	10,205	8,349
70–74 .....	6,570	7,277	7,740	8,430	8,412	8,402	6,649	8,315
75–79 .....	4,684	5,333	5,942	6,431	6,604	6,772	6,881	7,043
80–84 .....	2,981	3,381	3,879	4,392	4,476	4,541	4,627	4,651
85 or older .....	2,289	2,712	3,118	3,659	3,751	3,845	3,946	4,042
Sex:								
Men .....	9,868	10,852	11,758	12,694	12,818	12,919	13,007	13,079
Women .....	14,813	16,459	17,927	19,048	19,166	19,245	19,302	19,324
Race:								
White .....	21,876	24,060	25,849	27,899	28,035	28,061	28,115	28,115
All other races .....	2,114	2,441	2,910	3,028	3,136	2,914	3,020	4,126
Unknown .....	691	810	927	815	813	1,190	1,173	162

CONTACT: Maria Diacogiannis (410) 786-0178 for further information.

## 8.B Medicare: Enrollment, Utilization, & Reimbursement

Table 8.B5.—Hospital Insurance and Supplementary Medical Insurance: Number of disabled persons and persons with end stage renal disease under age 65 enrolled, by age, sex, and race, selected years July 1, 1980–1999

Age, sex, and race	1980		1990		1995		1998		1999	
	Total	End stage renal disease only	Total	End stage renal disease only	Total	End stage renal disease only	Total	End stage renal disease only	Total	End stage renal disease only
<b>Hospital Insurance and Supplementary Medical Insurance</b>										
Total .....	2,963,175	28,334	3,255,007	64,692	4,393,294	70,526	5,022,817	77,395	5,211,634	67,058
Age:										
Under 35 .....	371,204	8,773	483,265	16,603	587,709	15,942	558,419	16,234	542,507	12,792
35–44 .....	369,460	5,188	654,957	14,159	973,328	15,149	1,093,963	16,350	1,117,360	14,222
45–54 .....	657,486	6,977	741,200	15,800	1,187,995	19,473	1,453,359	22,231	1,539,116	20,337
55–64 .....	1,565,025	7,396	1,375,585	18,130	1,644,262	19,962	1,917,076	22,580	2,012,651	19,707
Sex:										
Men .....	1,870,558	14,547	2,042,944	33,647	2,627,807	36,279	2,885,653	40,371	2,959,769	35,798
Women .....	1,092,617	13,787	1,212,063	31,045	1,765,487	34,247	2,137,164	37,024	2,251,865	31,260
Race:										
White .....	2,422,253	19,232	2,480,767	35,638	3,216,249	34,418	3,622,218	35,791	3,734,108	28,574
All other races .....	486,677	7,907	712,315	26,477	985,924	31,407	1,141,214	35,397	1,445,265	37,603
Unknown .....	54,245	1,195	61,925	2,577	191,121	4,701	259,385	6,207	32,261	881
<b>Hospital Insurance</b>										
Total .....	2,963,156	28,334	3,254,983	64,677	4,393,287	70,526	5,022,811	77,394	5,211,162	67,056
Age:										
Under 35 .....	371,199	8,773	483,262	16,601	587,709	15,942	558,417	16,234	542,400	12,792
35–44 .....	369,458	5,188	654,953	14,157	973,328	15,149	1,093,962	16,350	1,117,262	14,222
45–54 .....	657,483	6,977	741,193	15,794	1,187,993	19,473	1,453,356	22,230	1,539,006	20,337
55–64 .....	1,565,016	7,396	1,375,575	18,125	1,644,257	19,962	1,917,076	22,580	2,012,494	19,705
Sex:										
Men .....	1,870,543	14,547	2,042,929	33,639	2,627,802	36,279	2,885,651	40,371	2,959,498	35,797
Women .....	1,092,613	13,787	1,212,054	31,038	1,765,485	34,247	2,137,160	37,023	2,251,664	31,259
Race:										
White .....	2,422,239	19,232	2,480,754	35,631	3,216,247	34,418	3,622,215	35,791	3,733,764	28,574
All other races .....	486,672	7,907	712,304	26,469	985,919	31,407	1,141,213	35,397	1,445,139	37,601
Unknown .....	54,245	1,195	61,925	2,577	191,121	4,701	259,383	6,206	32,259	881
<b>Supplementary Medical Insurance</b>										
Total .....	2,719,226	27,046	2,943,480	58,912	3,942,452	63,189	4,472,463	66,777	4,637,088	62,633
Age:										
Under 35 .....	339,665	8,294	441,640	14,782	534,868	14,042	500,821	13,683	485,600	11,830
35–44 .....	337,146	4,963	586,537	12,567	869,845	13,121	968,782	13,473	988,378	13,045
45–54 .....	596,287	6,683	666,257	14,559	1,049,718	17,483	1,272,214	19,155	1,346,050	18,899
55–64 .....	1,446,128	7,106	1,249,046	17,004	1,488,021	18,543	1,730,646	20,466	1,817,060	18,859
Sex:										
Men .....	1,694,569	13,887	1,833,959	30,338	2,346,940	32,122	2,556,481	34,249	2,620,171	33,092
Women .....	1,024,657	13,159	1,109,521	28,574	1,595,512	31,067	1,915,982	32,528	2,016,917	29,541
Race:										
White .....	2,218,176	18,458	2,236,781	32,347	2,882,893	30,531	3,220,156	30,160	3,315,154	26,658
All other races .....	449,753	7,446	650,121	24,240	891,837	28,487	1,024,864	31,310	1,293,562	35,173
Unknown .....	51,297	1,142	56,578	2,325	167,722	4,171	227,443	5,307	28,372	802

CONTACT: Maria Diacogiannis (410) 786-0178 for further information.

Table 8.B8—Hospital Insurance: Average covered charge per covered day of care in short-stay hospitals (1990–2000) and skilled nursing facilities (1975–2000), by state<sup>1</sup>

Census division and state <sup>2</sup>	Short-stay hospitals							
	1990	1994	1995	1996	1997	1998	1999	2000 <sup>3</sup>
Total <sup>4</sup>	\$1,090	\$1,753	\$1,908	\$2,067	\$2,235	\$2,370	\$2,533	\$2,753
United States <sup>5</sup>	1,081	1,763	1,920	2,081	2,252	2,388	2,554	2,777
New England.....	988	1,567	1,763	1,915	2,050	2,149	2,284	2,427
Connecticut .....	1,177	1,801	2,013	2,207	2,336	2,442	2,522	2,598
Maine.....	927	1,460	1,645	1,826	1,949	2,005	2,140	2,323
Massachusetts .....	942	1,513	1,705	1,830	1,975	2,091	2,251	2,419
New Hampshire .....	1,022	1,543	1,699	1,847	2,010	2,061	2,269	2,477
Rhode Island .....	851	1,413	1,638	1,818	1,923	2,046	2,172	2,309
Vermont.....	923	1,456	1,580	1,646	1,817	1,849	1,945	1,988
Middle Atlantic.....	943	1,550	1,704	1,849	2,082	2,272	2,480	2,734
New Jersey.....	725	1,639	1,865	2,093	2,458	2,726	3,154	3,752
New York.....	836	1,252	1,366	1,477	1,702	1,843	1,971	2,107
Pennsylvania .....	1,236	1,925	2,109	2,251	2,402	2,628	2,806	2,993
East North Central .....	1,097	1,721	1,866	2,025	2,146	2,225	2,377	2,540
Illinois .....	1,202	1,951	2,126	2,340	2,476	2,614	2,806	3,006
Indiana.....	997	1,575	1,713	1,830	1,950	2,006	2,108	2,264
Michigan.....	1,193	1,756	1,881	2,014	2,124	2,178	2,292	2,443
Ohio.....	1,030	1,599	1,730	1,872	1,985	2,050	2,233	2,348
Wisconsin.....	933	1,535	1,690	1,856	1,994	2,081	2,201	2,412
West North Central .....	1,052	1,677	1,831	1,988	2,111	2,235	2,400	2,628
Iowa.....	902	1,453	1,573	1,726	1,821	1,831	1,953	2,120
Kansas .....	1,093	1,752	1,957	2,105	2,212	2,203	2,377	2,577
Minnesota.....	1,132	1,794	1,938	2,108	2,243	2,457	2,651	2,898
Missouri.....	1,108	1,755	1,922	2,076	2,218	2,381	2,551	2,773
Nebraska.....	1,043	1,710	1,850	2,012	2,167	2,386	2,600	2,995
North Dakota .....	937	1,367	1,509	1,630	1,776	1,898	2,024	2,174
South Dakota.....	915	1,396	1,518	1,649	1,760	1,806	1,919	2,156
South Atlantic.....	1,106	1,722	1,876	2,023	2,154	2,277	2,430	2,629
Delaware .....	1,191	1,759	1,831	1,882	1,889	1,926	1,948	1,957
District of Columbia .....	1,374	1,960	2,129	2,267	2,417	3,061	3,178	3,318
Florida .....	1,360	2,124	2,351	2,567	2,730	2,902	3,147	3,432
Georgia.....	1,081	1,594	1,744	1,881	2,020	2,144	2,323	2,513
Maryland.....	813	1,256	1,365	1,504	1,618	1,527	1,565	1,601
North Carolina .....	932	1,502	1,603	1,688	1,799	1,896	2,004	2,165
South Carolina.....	1,021	1,675	1,818	1,950	2,087	2,185	2,362	2,605
Virginia .....	1,022	1,606	1,732	1,877	2,010	2,115	2,257	2,423
West Virginia.....	1,009	1,378	1,472	1,585	1,654	1,620	1,681	1,815
East South Central.....	1,019	1,573	1,718	1,858	1,983	2,077	2,248	2,442
Alabama .....	1,176	1,877	2,054	2,222	2,402	2,499	2,677	2,901
Kentucky.....	967	1,466	1,630	1,762	1,901	1,972	2,093	2,256
Mississippi.....	865	1,306	1,437	1,546	1,655	1,678	1,852	2,013
Tennessee.....	1,012	1,546	1,662	1,820	1,905	2,062	2,262	2,470
West South Central.....	1,138	1,783	1,937	2,098	2,234	2,344	2,520	2,759
Arkansas .....	923	1,382	1,511	1,649	1,744	1,776	1,974	2,182
Louisiana.....	1,180	1,794	1,926	2,056	2,179	2,275	2,451	2,718
Oklahoma.....	997	1,453	1,620	1,772	1,892	1,988	2,146	2,325
Texas.....	1,212	1,953	2,118	2,296	2,450	2,573	2,749	3,001
Mountain .....	1,350	2,181	2,321	2,549	2,743	2,878	3,016	3,269
Arizona .....	1,442	2,356	2,617	2,880	3,164	3,382	3,537	3,872
Colorado.....	1,308	2,225	2,240	2,434	2,504	2,673	3,047	3,382
Idaho .....	1,140	1,789	1,951	2,115	2,303	2,201	2,328	2,467
Montana.....	1,036	1,610	1,742	1,877	1,907	1,947	2,046	2,227
Nevada.....	2,031	2,967	3,253	3,492	3,858	4,017	3,973	4,295
New Mexico.....	1,140	1,766	1,913	2,081	2,302	2,254	2,410	2,525
Utah.....	1,283	1,990	2,069	2,290	2,433	2,556	2,721	2,862
Wyoming.....	1,094	1,765	1,985	2,110	2,269	2,122	2,257	2,365
Pacific .....	1,651	2,708	2,877	3,074	3,339	3,574	3,818	4,216
Alaska.....	1,470	2,032	2,385	2,434	2,695	2,701	2,817	3,152
California.....	1,794	2,960	3,156	3,371	3,679	3,931	4,228	4,690
Hawaii.....	1,224	2,242	2,319	2,484	2,599	2,803	2,941	2,964
Oregon.....	1,275	1,905	1,987	2,135	2,290	2,358	2,481	2,708
Washington.....	1,162	1,816	1,924	2,020	2,146	2,237	2,448	2,696
Outlying areas.....	510	686	739	794	842	832	894	944
Puerto Rico.....	505	683	736	793	837	831	893	943
Virgin Islands.....	746	854	843	831	1,068	870	922	1,008

See footnotes at end of table.

## 8.B Medicare: Enrollment, Utilization, & Reimbursement

Table 8.B8—Hospital Insurance: Average covered charge per covered day of care in short-stay hospitals (1975–1998) and skilled nursing facilities (1975–2000), by state <sup>1</sup>—*Continued*

Census division and state <sup>2</sup>	Skilled nursing facilities							
	1975	1980	1990	1995	1997	1998	1999	2000 <sup>3</sup>
Total <sup>4</sup> .....	\$43	\$70	\$193	\$402	\$487	\$498	\$425	\$421
United States <sup>5</sup> .....	43	70	193	402	487	498	425	421
New England.....	50	77	172	347	435	448	395	397
Connecticut .....	35	51	165	314	391	412	364	366
Maine.....	52	100	274	308	373	381	361	388
Massachusetts .....	63	98	181	380	492	510	438	434
New Hampshire .....	41	86	218	412	447	458	387	393
Rhode Island .....	43	59	129	265	331	337	341	348
Vermont.....	38	62	155	266	314	327	331	331
Middle Atlantic.....	50	73	168	308	368	391	378	385
New Jersey.....	45	81	164	344	426	468	393	399
New York.....	61	80	168	240	275	297	325	338
Pennsylvania .....	40	65	170	373	475	492	443	442
East North Central.....	40	68	167	358	461	478	413	412
Illinois.....	37	77	215	421	533	555	493	502
Indiana.....	35	60	180	399	500	514	414	399
Michigan.....	45	60	130	270	373	396	357	360
Ohio.....	41	69	157	375	473	486	422	419
Wisconsin.....	35	64	149	315	398	399	320	323
West North Central.....	45	82	194	367	433	452	421	427
Iowa.....	46	84	269	406	469	473	442	440
Kansas.....	39	66	255	461	524	533	504	505
Minnesota.....	46	94	125	245	276	286	273	286
Missouri.....	47	95	263	465	563	599	548	547
Nebraska.....	41	71	205	338	426	432	414	438
North Dakota.....	43	49	118	221	291	303	331	362
South Dakota.....	33	61	160	270	287	306	287	292
South Atlantic.....	34	59	168	396	494	498	388	374
Delaware.....	31	50	132	328	451	417	329	326
District of Columbia .....	34	64	193	389	498	529	447	413
Florida.....	34	59	195	488	602	609	446	424
Georgia.....	34	71	146	346	446	437	344	327
Maryland.....	37	56	141	347	471	482	390	382
North Carolina.....	31	52	132	283	367	382	315	315
South Carolina.....	26	46	159	337	465	457	358	342
Virginia.....	42	68	168	331	410	416	350	345
West Virginia.....	36	64	171	364	448	474	418	401
East South Central.....	37	56	154	358	460	467	381	383
Alabama.....	33	38	143	353	436	426	346	345
Kentucky.....	36	58	151	352	461	461	382	389
Mississippi.....	45	105	160	377	524	538	426	431
Tennessee.....	41	70	162	358	447	467	390	387
West South Central.....	45	94	267	539	660	651	546	520
Arkansas.....	44	84	238	372	468	501	458	464
Louisiana.....	43	83	374	683	753	759	726	667
Oklahoma.....	60	145	312	563	671	665	536	541
Texas.....	43	78	238	542	680	657	527	492
Mountain.....	38	64	226	486	568	568	463	448
Arizona.....	41	71	236	549	670	655	533	503
Colorado.....	42	73	266	538	584	588	480	462
Idaho.....	27	46	152	381	465	457	373	360
Montana.....	30	44	123	291	342	369	354	357
Nevada.....	37	66	232	569	721	744	559	564
New Mexico.....	57	122	267	488	589	582	528	509
Utah.....	36	75	266	473	529	545	425	414
Wyoming.....	36	49	208	379	467	433	392	398
Pacific.....	45	81	269	576	651	667	551	554
Alaska.....	68	115	283	437	704	634	759	756
California.....	46	87	287	629	709	728	604	610
Hawaii.....	49	83	217	467	505	508	425	457
Oregon.....	40	63	207	421	496	465	376	371
Washington.....	34	62	196	412	453	465	378	383
Outlying areas.....								
Puerto Rico.....	51	97	202	261	314	312	344	389
Virgin Islands.....	43	104	171	370	433	474	315	461

<sup>1</sup> Data for 1975 and 1980 are based on bills approved in each year and recorded in the Centers for Medicare & Medicaid Services before Dec. 29, 1995. Data from 1990–2000 are based on bills incurred in each year and recorded before Dec. 29, 2000. Includes data for services rendered to both aged and disabled persons.

<sup>2</sup>Geographic distribution reflects the beneficiaries' area of residence.

<sup>3</sup>Preliminary data.

<sup>4</sup>Excludes claims for persons residing in foreign countries.

<sup>5</sup>Includes claims for persons whose place of residence is unknown.

CONTACT: Maria Diacogiannis (410) 786-0178 for further information.

8.B Medicare: Enrollment, Utilization, & Reimbursement

Table 8.B8.1.—Hospital Insurance: Short-stay hospital discharges, by state, fiscal years 1990–2000

State	1990	1992	1993	1994	1995	1996	1997	1998	1999	2000
Total .....	10,472,587	11,124,165	11,122,070	11,503,279	11,680,874	11,749,394	11,952,088	11,912,079	11,659,885	11,664,041
Alabama .....	226,359	240,158	238,366	252,428	255,013	258,908	265,029	266,603	266,541	271,600
Alaska .....	6,491	7,447	7,446	7,954	8,635	9,593	9,917	10,633	11,031	11,457
Arizona .....	140,069	137,267	134,305	134,786	139,564	146,446	150,597	150,190	128,363	133,920
Arkansas .....	143,363	146,789	141,228	152,452	152,516	154,626	157,920	160,379	160,880	162,522
California .....	834,829	885,013	868,175	879,227	875,926	889,323	901,018	921,068	780,295	732,543
Colorado .....	98,262	104,555	102,789	104,733	105,216	102,450	103,735	97,479	100,648	100,610
Connecticut .....	114,938	134,079	134,264	138,988	141,765	141,031	143,071	133,672	125,115	123,780
Delaware .....	26,125	28,473	29,352	30,322	30,336	30,051	30,632	30,738	33,287	33,767
District of Columbia .....	36,062	37,616	37,612	39,306	39,526	38,661	38,508	38,661	38,693	38,723
Florida .....	579,368	684,199	696,322	734,297	742,862	739,066	743,556	758,714	736,958	760,154
Georgia .....	274,957	297,365	298,054	312,133	316,301	323,093	327,839	320,774	311,998	319,946
Hawaii .....	26,340	28,944	29,107	31,077	32,526	32,939	34,795	33,331	26,347	25,654
Idaho .....	31,559	33,064	33,806	35,923	36,327	39,236	41,066	42,451	43,353	43,593
Illinois .....	460,926	522,431	517,848	531,390	533,238	524,936	538,476	531,184	539,314	550,348
Indiana .....	254,404	266,239	267,841	278,602	276,601	278,303	287,615	289,743	289,693	294,997
Iowa .....	141,191	144,375	144,717	146,352	146,448	148,724	151,815	154,152	155,497	158,268
Kansas .....	117,017	117,648	118,000	121,106	120,593	122,917	125,481	127,045	126,920	126,782
Kentucky .....	199,042	207,091	206,131	219,042	222,162	224,322	231,081	231,352	237,553	241,392
Louisiana .....	213,819	217,702	218,393	228,770	234,663	235,574	237,390	232,942	223,794	234,815
Maine .....	54,963	61,022	61,205	62,904	63,013	64,361	66,278	67,895	68,128	68,384
Maryland .....	179,835	196,433	198,735	206,778	214,989	211,265	204,988	195,489	199,012	206,587
Massachusetts .....	286,332	311,500	315,864	314,727	310,455	299,734	293,217	280,333	268,179	261,591
Michigan .....	366,349	379,485	391,061	416,096	435,455	443,753	457,401	456,972	452,461	447,719
Minnesota .....	170,808	184,743	180,515	175,255	178,018	181,315	187,164	192,488	194,935	198,576
Mississippi .....	142,662	148,049	148,737	157,119	162,934	170,698	181,599	185,149	181,575	181,548
Missouri .....	281,059	284,099	278,659	292,107	298,509	298,805	299,996	297,554	293,724	298,150
Montana .....	40,505	40,560	40,343	40,361	40,770	40,831	41,542	41,854	42,343	43,763
Nebraska .....	69,299	69,270	66,847	68,982	70,113	72,975	75,630	77,188	76,841	76,349
Nevada .....	37,478	42,346	43,473	47,397	49,254	52,175	54,509	55,150	48,369	49,169
New Hampshire .....	39,103	40,913	40,515	41,737	42,746	43,834	44,758	42,918	42,054	45,266
New Jersey .....	338,509	363,838	372,253	377,524	385,145	375,353	371,173	364,034	373,224	368,032
New Mexico .....	50,391	48,520	48,373	47,576	50,334	49,758	53,329	52,913	51,459	50,585
New York .....	723,060	753,389	760,012	779,941	797,453	796,965	798,611	787,116	777,269	743,953
North Carolina .....	267,370	287,899	294,295	312,494	336,173	353,297	369,667	385,533	395,004	401,234
North Dakota .....	37,543	38,447	36,848	37,344	37,014	36,807	38,272	38,332	38,847	39,343
Ohio .....	527,006	535,508	534,017	557,927	562,234	565,237	562,603	541,958	533,499	529,912
Oklahoma .....	155,100	152,784	147,665	154,360	156,239	158,966	163,842	166,068	170,592	174,035
Oregon .....	106,164	109,871	106,863	106,454	105,878	106,901	111,656	111,028	100,569	90,934
Pennsylvania .....	685,403	748,226	758,360	768,866	766,535	731,542	728,572	692,290	664,002	630,150
Rhode Island .....	46,578	51,153	50,324	49,186	49,740	50,739	50,498	46,484	39,625	38,258
South Carolina .....	112,232	133,126	136,991	148,028	156,060	163,200	171,889	184,188	194,344	201,956
South Dakota .....	38,175	41,052	40,508	41,963	41,714	42,916	44,101	44,350	44,846	44,877
Tennessee .....	290,371	296,696	294,103	304,007	310,335	318,600	324,380	324,831	318,793	323,644
Texas .....	603,621	621,078	619,068	650,174	671,734	689,627	721,006	732,255	725,166	737,065
Utah .....	39,963	40,931	41,057	42,199	43,819	45,418	44,513	45,698	48,898	52,504
Vermont .....	20,251	21,409	21,636	22,239	22,815	23,001	23,456	22,585	23,133	23,860
Virginia .....	240,165	255,222	251,676	267,259	271,620	274,285	285,721	286,752	289,195	293,689
Washington .....	157,942	165,855	162,571	163,092	157,146	160,146	158,264	152,867	148,620	152,409
West Virginia .....	111,305	119,829	117,610	122,868	124,293	125,954	131,334	131,473	134,483	133,366
Wisconsin .....	217,727	223,501	220,189	225,486	227,774	226,898	232,721	233,103	233,432	235,466
Wyoming .....	15,255	14,783	14,580	15,505	16,009	15,912	16,557	17,256	17,429	18,561
Outlying areas:										
Puerto Rico .....	93,436	100,607	101,422	104,129	111,950	115,410	120,547	123,752	130,209	135,096
Virgin Islands .....	528	653	969	1,156	1,374	1,234	1,402	1,569	1,511	1,500
Unknown .....	978	913	970	1,151	1,012	1,283	1,351	1,543	1,835	1,639

Note: Discharge data for fiscal year 2000 are preliminary as of December 2000.

CONTACT: Maria Diacogiannis (410) 786-0178 for further information.

## 8.B Medicare: Enrollment, Utilization, & Reimbursement

Table 8.B9.—Supplementary Medical Insurance: Number of reimbursed bills, charges, and amount reimbursed, by type of service and type of beneficiary, 1992–2000

[In thousands. Includes only bills for which reimbursements were made by carriers or intermediaries and recorded in Centers for Medicare & Medicaid Services records before Mar. 31, 2001]

Period claim incurred <sup>1</sup>	All services <sup>2</sup>	Physicians' services			Outpatient hospital services	Independent laboratory services	Home health services <sup>3</sup>	All other services
		Total	Surgical <sup>4</sup>	Medical <sup>4</sup>				
Number of bills								
Persons aged 65 or older:								
1992 .....	472,494	343,545	40,176	303,369	37,986	45,030	121	45,812
1993 .....	507,057	358,766	39,489	319,277	40,806	48,141	160	59,184
1994 .....	554,498	397,244	42,750	354,494	44,476	52,813	178	59,787
1995 .....	578,104	406,868	44,896	361,972	48,063	53,175	213	69,785
1996 .....	590,301	411,789	46,171	365,618	50,578	52,417	248	75,269
1997 .....	600,228	418,826	46,517	372,309	52,364	49,917	245	78,876
1998 .....	611,356	427,891	46,273	381,618	52,807	42,715	4,632	83,311
1999 .....	<sup>6</sup> 486,296	429,299	45,496	383,803	51,498	(6)	5,499	(6)
2000 .....	(7)	(7)	(7)	(7)	(7)	(7)	(7)	(7)
Allowed charges <sup>5</sup>								
1992 .....	63,695,756	32,232,168	12,140,164	20,092,004	21,179,875	1,740,330	116,754	8,426,629
1993 .....	69,049,184	33,544,901	11,836,033	21,708,868	24,340,137	1,833,058	177,712	9,153,376
1994 .....	76,874,905	37,701,371	12,860,568	24,840,803	28,538,051	1,848,456	220,737	8,566,290
1995 .....	84,326,192	39,754,224	13,734,383	26,019,841	31,783,721	1,802,712	288,550	10,697,185
1996 .....	88,168,998	39,483,431	13,164,604	26,318,827	34,954,323	1,634,473	319,593	11,777,178
1997 .....	92,881,137	40,445,669	12,953,005	27,482,664	37,660,773	1,490,450	334,328	12,949,917
1998 .....	101,754,914	41,691,926	12,060,806	29,631,120	38,696,904	1,333,014	6,036,075	13,996,995
1999 .....	105,351,394	43,673,233	12,071,308	31,601,925	40,098,944	1,262,050	6,847,578	13,469,589
2000 .....	102,820,883	47,137,542	12,107,055	35,030,487	35,450,868	1,535,970	5,253,333	13,443,170
Amount reimbursed <sup>8</sup>								
1992 .....	39,371,755	25,181,542	9,537,434	15,644,108	7,325,694	1,692,787	83,634	5,088,098
1993 .....	41,833,132	26,286,843	9,316,793	16,970,050	8,085,002	1,786,035	125,662	5,549,590
1994 .....	45,850,064	29,551,995	10,141,117	19,410,878	9,222,076	1,796,306	158,445	5,121,242
1995 .....	49,727,101	31,117,304	10,833,801	20,283,503	10,090,122	1,751,375	206,543	6,561,757
1996 .....	50,798,250	30,914,500	10,381,168	20,533,332	10,731,299	1,583,842	228,182	7,340,427
1997 .....	52,430,354	31,682,203	10,218,372	21,463,831	11,206,086	1,440,418	233,845	7,867,802
1998 .....	56,669,900	32,658,601	9,517,107	23,141,494	10,643,987	1,278,551	4,252,056	7,806,705
1999 .....	58,084,084	34,349,529	9,517,348	24,832,181	10,324,977	1,207,160	4,817,709	7,384,709
2000 .....	60,280,333	37,048,382	9,549,347	27,499,035	10,202,242	1,459,690	3,918,673	7,651,346
Number of bills								
Disabled beneficiaries:								
1992 .....	52,565	33,951	3,142	30,809	7,809	4,731	1	6,073
1993 .....	59,885	38,755	3,374	35,381	8,907	5,286	...	6,937
1994 .....	70,089	46,364	3,859	42,505	10,107	6,753	...	6,865
1995 .....	77,224	49,829	4,261	45,568	11,152	7,758	...	8,485
1996 .....	82,908	53,010	4,594	48,416	12,068	8,193	1	9,636
1997 .....	86,071	55,260	4,773	50,487	12,415	8,073	...	10,323
1998 .....	89,890	58,244	4,991	53,253	12,639	6,776	475	11,756
1999 .....	<sup>6</sup> 72,288	59,281	5,042	54,239	12,413	(6)	594	(6)
2000 .....	(7)	(7)	(7)	(7)	(7)	(7)	(7)	(7)
Allowed charges <sup>5</sup>								
1992 .....	9,149,564	3,338,315	1,006,996	2,331,319	4,314,700	187,936	2,373	1,306,239
1993 .....	10,682,707	3,841,935	1,067,711	2,774,221	5,402,254	208,698	17	1,229,803
1994 .....	12,561,482	4,659,517	1,231,331	3,428,186	6,543,312	247,559	63	1,110,031
1995 .....	14,392,023	5,005,089	1,392,174	3,612,915	7,691,393	280,673	79	1,414,789
1996 .....	15,900,771	5,168,435	1,401,271	3,767,164	8,680,992	284,031	194	1,767,119
1997 .....	17,057,906	5,398,744	1,409,511	3,989,233	9,391,718	281,453	575	1,985,416
1998 .....	18,720,517	5,821,159	1,400,856	4,420,303	9,539,962	252,450	717,092	2,389,854
1999 .....	19,916,349	6,250,597	1,451,037	4,799,560	10,071,491	244,217	857,855	2,492,189
2000 .....	19,567,132	6,813,109	1,467,276	5,345,833	9,254,910	278,107	675,373	2,545,633

See footnotes at end of table.

## 8.B Medicare: Enrollment, Utilization, & Reimbursement

Table 8.B9.—Supplementary Medical Insurance: Number of reimbursed bills, charges, and amount reimbursed, by type of service and type of beneficiary, 1992–2000—*Continued*

[In thousands. Includes only bills for which reimbursements were made by carriers or intermediaries and recorded in Centers for Medicare & Medicaid Services records before Mar. 31, 2001]

Period claim incurred <sup>1</sup>	All services <sup>2</sup>	Physicians' services			Outpatient hospital services	Independent laboratory services	Home health services <sup>3</sup>	All other services
		Total	Surgical <sup>4</sup>	Medical <sup>4</sup>				
	Amount reimbursed <sup>8</sup>							
1992 .....	5,759,178	2,541,003	783,020	1,757,983	2,130,491	185,199	1,564	900,920
1993 .....	6,500,244	2,927,640	831,482	2,096,162	2,521,822	204,857	16	845,905
1994 .....	7,458,746	3,547,105	959,659	2,587,446	2,886,999	242,791	46	781,805
1995 .....	8,407,923	3,791,099	1,088,307	2,702,792	3,331,529	275,955	52	1,009,288
1996 .....	9,099,174	3,908,892	1,095,969	2,812,923	3,652,382	278,816	142	1,258,942
1997 .....	9,590,902	4,093,188	1,103,023	2,990,165	3,838,798	276,051	454	1,383,411
1998 .....	10,432,018	4,404,528	1,092,002	3,309,526	3,773,959	246,241	494,389	1,512,901
1999 .....	10,932,394	4,746,000	1,133,434	3,612,566	3,822,307	237,960	588,574	1,537,553
2000 .....	11,325,194	5,183,942	1,148,818	4,035,124	3,791,047	270,957	487,188	1,592,060

<sup>1</sup> Period for which the claim incurred.

<sup>2</sup> Included in total, but not shown separately, are some bills and charges for which type of service is unknown.

<sup>3</sup> Due to Balanced Budget Act provisions, beginning in 1998 Part A now has a 100-visit limit and additional home health services will be billed under Part B.

<sup>4</sup> Where both medical and surgical charges are included on a single bill, the highest-priced service is the determining factor in classifying the bill.

<sup>5</sup> Includes physician or supplier allowed charges as determined by the carrier and amounts actually billed by providers for outpatient hospital and home health services.

<sup>6</sup> Data not available due to programmatic problems. Total for all services excluded independent laboratory services and all other services.

<sup>7</sup> Data on the number of bills are no longer available.

<sup>8</sup> Amount reimbursed to or on behalf of the beneficiary—generally 80 percent of the allowed charges, once the beneficiary has satisfied the deductible in the current year. Some radiology and pathology services are reimbursed at a 100 percent rate, regardless of the beneficiary's deductible status.

CONTACT: Maria Diacogiannis (410) 786-0178 for further information.

**8.B Medicare: Enrollment, Utilization, & Reimbursement**

**Table 8.B10.—Supplementary Medical Insurance: Claims received by carriers and assignment rates, 1969–2000**

Calendar year	Total number of claims (in thousands)	Net assignment rate <sup>1</sup> (percent)
1969	37,542	61.5
1970	42,148	60.8
1971	46,572	58.5
1972	51,041	54.9
1973	57,007	52.7
1974	68,307	51.9
1975	79,980	51.8
1976	91,624	50.5
1977	105,339	50.5
1978	117,886	50.6
1979	132,098	51.3
1980	150,048	51.5
1981	167,154	52.3
1982	182,440	53.0
1983	204,122	53.9
1984	238,362	59.0
1985	279,559	68.5
1986	306,714	68.0
1987	346,551	73.1
1988	386,763	77.3
1989	421,305	79.7
1990	474,226	81.1
1991	517,123	83.1
1992	554,619	86.2
1993	583,863	90.1
1994	622,514	92.8
1995	647,855	94.7
1996	678,030	95.9
1997	688,891	96.7
1998	697,523	97.3
1999	703,227	97.6
2000	720,493	97.9

<sup>1</sup> Represents the number of assigned claims as a percent of claims received.

**Table 8.B11.—Supplementary Medical Insurance: Reasonable charge determination for claims assigned and unassigned for aged and disabled persons, 1971–2000**

Calendar year	Claims approved		Charges before reduction	
	Number (in thousands)	Percent reduced	Amount (in millions)	Percent reduced
Assigned claims				
1971	25,919	44.5	\$1,571	11.1
1972	26,798	47.5	1,630	10.9
1973	28,376	55.6	1,751	11.9
1974	33,295	64.5	2,194	14.3
1975	39,218	70.8	2,716	17.8
1976	44,065	74.3	3,261	19.9
1977	50,260	72.8	3,936	19.4
1978	56,493	73.6	4,678	19.9
1979	64,051	77.0	5,746	21.2
1980	73,068	80.8	7,303	22.7
1981 <sup>1</sup>	80,127	82.8	8,868	24.0
1982	91,615	83.3	11,315	24.3
1983	103,139	81.0	13,657	23.6
1984	128,559	80.8	16,571	25.4
1985	176,956	81.7	22,008	27.4
1986	191,139	82.8	24,662	28.4
1987	234,488	83.4	31,179	28.0
1988	271,225	85.6	37,275	29.8
1989	304,649	86.9	44,567	31.0
1990	341,220	87.5	51,012	32.9
1991	384,168	87.4	60,057	36.2
1992	412,924	86.2	67,667	39.7
1993	460,761	88.8	76,186	42.8
1994	508,981	87.7	85,170	42.5
1995	539,630	86.4	93,300	42.3
1996	550,587	87.1	97,744	44.9
1997	566,591	87.4	103,389	45.9
1998	575,799	87.9	106,947	46.9
1999	590,463	88.9	114,981	47.8
2000	615,862	87.9	126,391	47.7
Unassigned claims				
1971	17,955	57.6	\$1,348	12.5
1972	21,286	59.3	1,608	12.0
1973	24,691	66.4	1,886	12.6
1974	30,492	72.7	2,401	14.7
1975	36,182	77.4	2,973	17.7
1976	42,100	78.9	3,591	19.8
1977	48,619	77.1	4,233	19.0
1978	53,700	77.5	4,749	19.2
1979	59,961	80.9	5,596	20.7
1980	68,113	84.3	6,836	22.5
1981 <sup>1</sup>	72,765	85.8	7,870	23.8
1982	80,253	85.4	9,545	23.9
1983	87,436	82.7	10,885	22.9
1984	88,594	83.7	11,216	24.2
1985	77,965	84.6	10,059	25.9
1986	87,121	85.0	10,757	26.9
1987	83,116	82.4	10,258	24.7
1988	76,503	86.4	9,005	25.0
1989	74,947	90.1	8,971	25.0
1990	77,746	90.4	8,789	25.3
1991	77,520	91.3	7,884	23.1
1992	66,403	82.9	6,215	18.5
1993	51,080	86.5	4,267	16.5
1994	39,364	86.4	3,255	16.3
1995	29,975	83.4	2,543	15.4
1996	22,819	84.4	1,952	15.8
1997	18,615	84.4	1,650	16.4
1998	15,172	82.3	1,382	17.1
1999	13,834	81.3	1,316	17.7
2000	12,755	78.6	1,287	18.1

<sup>1</sup> Excludes Texas Blue-Shield plan for July–December 1981.



Table 8.B12.—Supplementary Medical Insurance: State buy-ins, 1991–2001

State	1991	1993	1994	1995	1996	1997	1998	1999	2000	2001
United States	3,640,121	4,168,837	4,443,683	4,705,625	4,914,789	5,008,860	5,109,228	5,273,573	5,425,048	5,615,326
Alabama	97,601	109,353	112,909	116,916	120,399	122,720	121,990	128,875	136,860	141,436
Alaska	4,539	5,354	5,853	6,193	6,659	6,835	7,093	7,799	8,486	8,832
Arizona	28,650	36,980	40,360	44,236	47,393	49,213	51,141	53,450	57,712	61,989
Arkansas	64,996	72,885	74,689	77,660	79,549	79,176	78,514	79,508	79,606	80,231
California	646,108	697,406	722,377	747,814	768,907	769,335	776,832	793,510	818,846	848,361
Colorado	36,470	41,738	43,747	46,660	49,561	50,749	52,175	53,964	55,325	56,934
Connecticut	23,535	36,062	40,812	48,047	50,226	50,668	51,335	52,134	53,141	55,933
Delaware	4,499	5,433	6,058	6,645	7,735	8,446	8,900	8,231	10,737	12,094
District of Columbia	12,791	11,205	13,436	14,152	14,195	14,482	14,582	13,181	14,233	14,621
Florida	196,992	229,914	258,382	271,430	290,838	304,791	313,744	324,172	342,109	358,642
Georgia	128,976	146,893	153,559	160,380	165,210	168,267	171,047	171,638	176,596	181,312
Hawaii	11,529	13,706	15,571	16,695	17,905	18,751	19,226	19,962	20,326	21,090
Idaho	9,127	11,185	12,062	12,931	13,835	14,296	14,909	15,868	17,081	18,550
Illinois	94,434	122,169	129,353	137,571	144,330	144,684	145,976	149,850	155,743	161,141
Indiana	60,297	69,500	74,598	76,460	75,930	76,846	81,184	82,901	87,543	91,311
Iowa	41,170	44,713	46,223	48,517	50,031	49,344	49,844	50,954	51,976	52,891
Kansas	26,960	30,046	32,485	34,708	37,064	37,486	39,008	40,365	41,217	42,126
Kentucky	76,456	88,272	92,555	97,978	103,705	105,188	106,537	111,789	117,697	118,641
Louisiana	87,570	101,002	106,915	112,090	114,917	114,482	115,031	116,602	117,179	117,867
Maine	22,176	25,837	27,447	29,453	31,063	32,168	33,006	35,211	36,946	38,161
Maryland	48,028	52,891	55,978	58,865	59,882	59,745	61,669	64,086	65,372	68,010
Massachusetts	89,163	109,304	118,683	125,859	132,575	132,874	138,796	143,779	152,587	160,198
Michigan	91,340	108,216	116,004	123,948	131,263	130,682	135,769	139,411	145,172	148,760
Minnesota	39,366	45,956	48,577	52,192	55,989	56,486	57,559	59,926	63,607	66,874
Mississippi	90,530	98,952	103,338	108,577	104,036	106,461	106,336	107,176	107,495	116,503
Missouri	55,116	64,243	68,610	72,659	76,883	79,847	81,841	85,329	88,343	91,244
Montana	10,058	9,578	10,206	11,031	11,638	11,825	11,882	12,274	12,828	13,120
Nebraska	11,358	14,142	15,357	16,146	16,986	17,321	18,029	19,064	20,520	21,121
Nevada	8,657	11,080	12,350	14,227	15,711	16,435	17,191	18,322	19,155	20,709
New Hampshire	3,807	4,555	4,982	5,405	5,878	6,119	6,295	6,875	7,434	8,866
New Jersey	95,795	105,339	113,658	122,923	131,292	135,109	137,598	143,024	146,705	149,303
New Mexico	22,246	27,440	29,268	29,855	32,346	33,472	34,411	36,023	37,330	39,275
New York	255,952	283,900	304,719	325,882	342,539	352,129	363,331	372,824	369,479	395,830
North Carolina	117,656	147,404	159,439	186,328	197,039	204,551	210,388	216,563	223,402	228,997
North Dakota	4,639	5,218	5,400	5,560	5,751	5,684	5,612	5,758	5,908	6,275
Ohio	112,598	139,755	151,070	164,044	172,316	178,365	180,172	181,407	171,139	176,602
Oklahoma	51,457	55,868	57,960	60,800	61,723	62,965	63,142	66,115	67,413	67,787
Oregon	28,537	36,654	39,558	43,642	47,600	49,553	51,392	55,896	59,169	62,910
Pennsylvania	127,519	138,565	156,701	162,788	170,790	173,142	179,295	198,492	206,468	215,351
Rhode Island	10,585	13,466	14,353	15,517	16,780	17,321	17,729	18,513	19,787	21,620
South Carolina	78,701	88,876	92,551	95,970	98,817	101,455	104,111	110,032	112,232	116,288
South Dakota	9,399	11,333	11,839	12,346	12,661	12,778	12,791	13,112	13,146	13,237
Tennessee	116,861	130,102	140,945	148,391	157,602	164,010	171,653	178,707	182,342	184,570
Texas	234,169	274,297	294,115	314,991	327,827	336,801	339,648	350,959	360,191	370,598
Utah	10,263	12,101	12,902	13,506	14,387	14,589	14,900	15,569	16,231	16,712
Vermont	8,223	10,467	11,240	12,428	12,863	13,048	13,197	13,598	13,754	14,296
Virginia	77,898	92,793	97,821	102,964	107,457	108,365	108,427	111,404	113,259	113,898
Washington	54,774	62,973	66,830	71,531	76,885	83,128	89,419	91,976	97,390	94,852
West Virginia	28,086	34,479	36,531	39,720	42,377	43,572	43,019	45,406	46,305	47,774
Wisconsin	67,516	73,884	77,472	75,247	78,661	76,109	74,429	74,681	74,101	73,875
Wyoming	3,505	4,276	4,726	5,265	5,548	5,781	5,963	6,183	6,444	6,746
Outlying areas:										
Guam	443	579	600	669	710	682	650	583	417	385
Northern Mariana Islands	273	335	320	314	318	322	311	335	342	367
Virgin Islands	727	163	189	219	205	207	199	207	204	210

Note: Data are as of July except for 1995 data which are as of June.

CONTACT: Maria Diacogiannis (410) 786-0178 for further information.

## 8.C Medicare: Participating Facilities

Table 8.C1.—Hospital Insurance and Supplementary Medical Insurance: Number of facilities and beds, by participating providers, December 1967–2000

Year	Hospitals			Skilled nursing facilities	Home health agencies	CLIA/independent laboratories
	All hospitals	General <sup>1</sup>	Psychiatric			
	Facilities					
1967.....	6,829	6,501	328	4,405	1,890	2,355
1970.....	6,779	6,444	335	4,494	2,333	2,750
1971.....	6,741	6,401	340	4,084	2,256	2,808
1972.....	6,744	6,392	352	3,981	2,212	2,906
1973.....	6,746	6,388	358	3,961	2,222	2,961
1974.....	6,707	6,349	358	3,892	2,254	2,991
1975.....	6,770	6,383	387	3,932	2,290	3,174
1976.....	6,774	6,368	406	3,992	2,353	3,156
1977.....	6,755	6,353	402	4,461	2,496	3,249
1978.....	6,848	6,432	416	4,982	2,715	3,384
1979.....	6,780	6,372	408	5,055	2,858	3,448
1980.....	6,736	6,325	411	5,155	3,012	3,374
1981.....	6,749	6,335	414	5,295	3,169	3,511
1982.....	6,737	6,321	416	5,510	3,627	3,643
1983.....	6,687	6,257	430	5,760	4,235	3,708
1984.....	6,676	6,228	448	6,183	5,237	3,890
1985.....	6,710	6,209	501	6,725	5,932	4,029
1986.....	6,731	6,189	542	7,148	5,953	4,298
1987.....	6,715	6,130	585	7,379	5,769	4,487
1988.....	6,658	6,044	614	7,683	5,673	4,676
1989.....	6,547	5,891	656	8,688	5,661	4,828
1990.....	6,522	5,848	674	9,008	5,730	4,881
1991.....	6,471	5,759	712	10,061	5,963	4,898
1992.....	6,433	5,722	711	10,910	6,461	4,942
1993.....	6,473	5,738	735	11,472	7,000	<sup>2</sup> 156,117
1994.....	6,414	5,705	709	12,584	7,827	<sup>2</sup> 151,422
1995.....	6,376	5,694	682	13,452	8,447	<sup>2</sup> 156,511
1996.....	6,273	5,627	646	14,177	9,850	<sup>2</sup> 157,876
1997.....	6,293	5,639	654	14,860	10,807	<sup>2</sup> 164,054
1998.....	6,116	5,514	602	15,032	9,330	<sup>2</sup> 166,817
1999.....	5,985	5,415	570	14,913	7,857	<sup>2</sup> 171,018
2000.....	6,031	5,512	519	14,841	7,099	<sup>2</sup> 168,333
	Beds					
1967.....	1,141,155	837,211	303,944	308,843	...	...
1970.....	1,190,309	878,509	311,800	325,415	...	...
1971.....	1,172,353	888,205	284,148	296,090	...	...
1972.....	1,155,270	906,280	248,990	287,533	...	...
1973.....	1,147,501	919,832	227,669	290,060	...	...
1974.....	1,132,435	925,772	206,663	289,416	...	...
1975.....	1,136,908	939,717	197,191	287,468	...	...
1976.....	1,169,433	980,805	188,628	332,515	...	...
1977.....	1,130,519	976,465	154,054	381,715	...	...
1978.....	1,154,250	1,015,645	138,605	414,188	...	...
1979.....	1,152,088	1,016,525	135,563	433,715	...	...
1980.....	1,145,245	1,017,794	127,451	448,007	...	...
1981.....	1,152,877	1,032,042	120,835	463,715	...	...
1982.....	1,146,480	1,044,427	102,053	497,056	...	...
1983.....	1,143,544	1,046,674	96,870	519,551	...	...
1984.....	1,146,093	1,050,832	95,261	548,201	...	...
1985.....	1,144,589	1,046,889	97,700	(3)	...	...
1986.....	1,137,853	1,043,430	94,423	444,326	...	...
1987.....	1,124,928	1,030,556	94,372	449,867	...	...
1988.....	1,115,809	1,022,116	93,693	476,447	...	...
1989.....	1,106,295	1,008,845	97,450	507,475	...	...
1990.....	1,104,703	1,005,480	99,223	512,107	...	...
1991.....	1,102,286	1,003,147	99,139	583,116	...	...
1992.....	1,093,895	997,695	96,200	606,218	...	...
1993.....	1,094,422	994,847	99,575	622,534	...	...
1994.....	1,074,371	985,809	88,562	649,054	...	...
1995.....	1,056,454	970,143	86,311	657,225	...	...
1996.....	1,038,105	955,604	82,501	671,839	...	...
1997.....	1,037,356	954,372	82,984	684,977	...	...
1998.....	1,012,168	934,635	77,533	722,626	...	...
1999.....	993,901	920,326	73,575	836,720	...	...
2000.....	982,616	913,806	68,810	939,364	...	...

<sup>1</sup> Includes short-stay and other long-stay hospitals.

<sup>2</sup> Beginning in 1993, the data include all Clinical Laboratory Improvement Act facilities as of December of each year.

<sup>3</sup> Data not available.

CONTACT: Maria Diacogiannis (410) 786-0178 for further information.

Table 8.C2—Hospital Insurance: Number of participating hospitals and beds per 1,000 enrollees, by state, December 2000

[In thousands]

Census division and state	All hospitals		Short stay			Long stay	
	Hospitals	Beds	Hospitals	Beds	Beds per 1,000 enrollees <sup>1</sup>	Hospitals	Beds
Total	6,031	982,616	4,704	862,607	22.2	1,327	120,009
United States	5,968	971,544	4,647	852,683	22.4	1,321	118,861
New England	270	45,413	189	34,638	16.5	81	25,285
Connecticut	47	10,892	32	8,884	17.4	15	8,062
Maine	41	4,227	31	3,683	17.2	10	9,998
Massachusetts	119	20,537	75	14,257	15.0	44	5,282
New Hampshire	30	3,442	26	2,967	17.6	4	475
Rhode Island	17	4,220	11	2,957	17.5	6	1,263
Vermont	16	2,095	14	1,890	21.5	2	205
Middle Atlantic	627	158,260	491	131,704	22.5	136	26,556
New Jersey	108	31,970	82	28,201	23.9	26	3,769
New York	268	82,147	216	67,447	26.1	52	14,700
Pennsylvania	251	44,143	193	36,056	17.3	58	8,087
East North Central	886	170,994	708	155,220	24.6	178	15,774
Illinois	218	49,377	184	46,051	28.6	34	3,326
Indiana	151	21,353	106	18,985	22.4	45	2,368
Michigan	174	31,926	137	28,229	20.3	37	3,697
Ohio	203	48,158	165	43,828	26.1	38	4,330
Wisconsin	140	20,180	116	18,127	23.3	24	2,053
West North Central	770	81,269	577	72,066	25.4	193	9,203
Iowa	120	12,300	106	11,701	24.7	14	599
Kansas	149	12,127	107	10,610	27.4	42	1,517
Minnesota	150	17,147	129	14,918	23.0	21	2,229
Missouri	141	26,116	111	24,014	28.2	30	2,102
Nebraska	96	6,892	43	5,057	20.1	53	1,835
North Dakota	51	3,350	36	2,857	27.9	15	493
South Dakota	63	3,337	45	2,909	24.5	18	428
South Atlantic	907	175,523	703	154,739	20.9	204	20,784
Delaware	11	2,325	5	1,892	17.0	6	433
District of Columbia	16	5,105	10	3,946	54.8	6	1,159
Florida	236	53,970	183	50,071	18.0	53	3,899
Georgia	182	26,474	144	23,103	25.6	38	3,371
Maryland	67	16,675	48	13,229	20.8	19	3,446
North Carolina	135	26,337	114	22,930	20.4	21	3,407
South Carolina	76	12,560	62	11,336	20.2	14	1,224
Virginia	118	22,403	91	19,532	22.2	27	2,871
West Virginia	66	9,674	46	8,700	25.9	20	974
East South Central	491	77,680	416	71,277	28.4	75	6,403
Alabama	123	20,591	105	19,006	28.1	18	1,585
Kentucky	117	18,633	95	16,292	27.4	22	2,341
Mississippi	104	12,390	97	12,008	28.9	7	382
Tennessee	147	26,066	119	23,971	29.2	28	2,095
West South Central	897	106,682	653	91,353	24.2	244	15,329
Arkansas	95	11,895	69	10,105	23.2	26	1,790
Louisiana	176	22,137	116	17,914	30.3	60	4,223
Oklahoma	151	14,820	112	13,078	26.0	39	1,742
Texas	475	57,830	356	50,256	22.5	119	7,574
Mountain	445	45,254	333	39,618	18.4	112	5,636
Arizona	84	11,304	67	10,370	15.6	17	934
Colorado	82	11,466	60	9,448	20.6	22	2,018
Idaho	48	2,908	29	2,493	15.3	19	415
Montana	61	2,846	44	2,695	19.9	17	151
Nevada	42	4,785	28	4,100	17.3	14	685
New Mexico	51	4,957	38	4,369	19.1	13	588
Utah	50	5,356	43	4,594	22.6	7	762
Wyoming	27	1,632	24	1,549	23.9	3	83
Pacific	675	110,469	577	102,068	19.8	98	8,401
Alaska	24	1,550	21	1,347	32.6	3	203
California	465	84,143	397	78,475	21.0	68	5,668
Hawaii	27	2,777	23	2,375	14.6	4	402
Oregon	63	8,063	56	7,650	15.9	7	413
Washington	96	13,936	80	12,221	16.9	16	1,715
Outlying areas	63	11,072	57	9,924	11.5	6	1,148
Puerto Rico	58	10,399	52	9,251	17.3	6	1,148
Virgin Islands	2	320	2	320	31.3	...	...
Other	3	353	3	353	1.1	...	...

<sup>1</sup> Based on total number of persons enrolled in the Hospital Insurance program as of July 2000.

## 8.C Medicare: Participating Facilities

Table 8.C3—Hospital Insurance and Supplementary Medical Insurance: Number of participating skilled nursing facilities, home health agencies, independent laboratories, and end stage renal disease facilities, by state, December 2000

Census division and state	Skilled nursing facilities			Home health agencies	Clinical Laboratory Improvement Act facilities	End stage renal diseases facilities
	Number	Beds	Beds per 1,000 enrollees <sup>1</sup>			
Total .....	14,841	939,364	24.1	7,099	168,333	3,991
United States .....	14,832	939,024	24.7	7,050	167,430	3,951
New England.....	1,089	86,611	41.2	325	8,886	136
Connecticut.....	250	26,829	52.5	81	2,484	31
Maine.....	126	7,611	35.6	36	929	12
Massachusetts.....	505	37,174	39.1	136	3,546	65
New Hampshire.....	67	4,547	27.0	34	784	10
Rhode Island.....	99	6,974	41.3	25	743	12
Vermont.....	42	3,476	39.5	13	400	6
Middle Atlantic.....	1,774	204,049	34.9	590	21,683	522
New Jersey.....	360	32,084	27.2	54	4,757	89
New York.....	664	120,106	46.4	211	9,883	209
Pennsylvania.....	750	51,859	24.9	325	7,043	224
East North Central.....	2,809	150,606	23.9	1,138	27,726	551
Illinois.....	657	20,506	12.8	288	7,251	129
Indiana.....	499	22,355	26.4	178	4,153	82
Michigan.....	389	26,899	19.3	194	5,766	105
Ohio.....	892	50,243	29.9	346	8,127	155
Wisconsin.....	372	30,603	39.3	132	2,429	80
West North Central.....	1,781	96,380	34.0	899	12,835	314
Iowa.....	302	17,666	37.3	179	2,269	47
Kansas.....	263	10,068	26.0	149	2,074	40
Minnesota.....	412	36,797	56.7	251	2,158	69
Missouri.....	455	9,901	11.6	170	4,109	104
Nebraska.....	172	9,349	37.1	69	1,196	22
North Dakota.....	88	6,954	68.0	35	467	13
South Dakota.....	89	5,645	47.6	46	562	19
South Atlantic.....	2,278	139,226	18.8	966	33,222	895
Delaware.....	38	2,780	25.0	16	552	13
District of Columbia.....	19	1,535	21.3	16	458	24
Florida.....	724	44,583	16.1	307	10,936	248
Georgia.....	325	22,693	25.1	99	5,239	170
Maryland.....	244	15,253	24.0	53	3,113	109
North Carolina.....	408	24,887	22.1	164	4,920	109
South Carolina.....	178	11,955	21.3	76	2,557	77
Virginia.....	229	9,776	11.1	167	3,954	120
West Virginia.....	113	5,764	17.2	68	1,493	25
East South Central.....	936	46,771	18.7	469	10,928	318
Alabama.....	221	12,194	18.0	143	2,894	94
Kentucky.....	307	16,356	27.5	111	2,555	48
Mississippi.....	132	6,292	15.1	62	1,781	62
Tennessee.....	276	11,929	14.5	153	3,698	114
West South Central.....	1,682	75,854	20.1	1,485	20,880	535
Arkansas.....	189	6,020	13.8	182	1,727	57
Louisiana.....	232	14,794	25.0	257	3,373	123
Oklahoma.....	242	10,573	21.0	187	2,611	60
Texas.....	1,019	44,467	19.9	859	13,169	295
Mountain.....	766	44,768	20.8	485	9,170	218
Arizona.....	148	6,189	9.3	68	2,543	83
Colorado.....	202	12,288	26.8	130	2,141	37
Idaho.....	82	5,149	31.6	53	674	8
Montana.....	101	6,253	46.1	51	606	15
Nevada.....	49	5,238	22.1	35	897	16
New Mexico.....	69	2,510	10.9	67	1,014	29
Utah.....	81	4,595	22.6	42	976	21
Wyoming.....	34	2,546	39.2	39	319	9
Pacific.....	1,717	94,759	18.4	693	22,100	462
Alaska.....	15	487	11.8	16	418	2
California.....	1,271	71,712	19.2	536	16,355	359
Hawaii.....	41	3,125	19.2	19	742	17
Oregon.....	124	5,291	11.0	60	1,931	41
Washington.....	266	14,144	19.5	62	2,654	43
Outlying areas.....	9	340	.4	49	903	40
Puerto Rico.....	7	244	.5	45	831	32
Virgin Islands.....	1	60	5.9	2	25	3
Other.....	1	36	.1	2	47	5

<sup>1</sup> Based on total number of persons enrolled in the Hospital Insurance program as of July 2000.

Table 8.E1.—Unduplicated number of recipients, total vendor payments, and average amounts, by type of medical service, fiscal years 1972–1998<sup>1,2</sup>

Fiscal year	Total	Inpatient services in—		Intermediate-care facility (ICF) services for—		Nursing facility <sup>3</sup>	Physicians'	Dental	Other practitioner	Out-patient hospital	Clinic	Laboratory and radiological	Home health	Pre-scribed drugs	Family planning	Other
		General hospital	Mental hospital	Mentally retarded	All other											
Number (in thousands)																
1972.....	17,606	2,832	40	...	...	552	12,282	2,397	1,600	5,215	501	3,523	105	11,139	...	2,531
1975.....	22,007	3,432	67	69	682	630	15,198	3,944	2,673	7,437	1,086	4,738	343	14,155	1,217	2,911
1980.....	21,605	3,680	66	121	789	606	13,765	4,652	3,234	9,705	1,531	3,212	392	13,707	1,129	2,563
1985.....	21,814	3,434	60	147	828	547	14,387	4,672	3,357	10,072	2,121	6,354	535	13,921	1,636	5,371
1986.....	22,515	3,544	53	145	828	571	14,894	5,161	3,451	10,702	2,027	7,123	593	14,704	1,732	5,573
1987.....	23,109	3,767	57	149	849	572	15,373	5,131	3,542	10,979	2,183	7,596	609	15,083	1,652	5,957
1988.....	22,907	3,832	60	145	866	579	15,265	5,072	3,480	10,533	2,256	7,579	569	15,323	1,525	6,601
1989.....	23,511	4,170	90	148	888	564	15,686	4,214	3,555	11,344	2,391	7,759	609	15,916	1,564	7,278
1990.....	25,255	4,593	92	147	860	601	17,078	4,552	3,873	12,370	2,804	8,959	719	17,294	1,752	8,302
1991.....	28,280	5,072	65	146	(3)	1,500	19,321	5,209	4,282	14,137	3,511	10,505	813	19,602	2,185	10,319
1992.....	30,926	5,768	77	151	(3)	1,573	21,627	5,700	4,711	15,120	4,115	11,804	925	22,030	2,550	12,427
1993.....	33,432	5,894	75	149	(3)	1,610	23,746	6,174	5,229	16,436	4,839	12,970	1,067	23,901	2,538	15,035
1994.....	35,053	5,866	85	159	...	1,639	24,267	6,352	5,409	16,567	5,258	13,412	1,293	24,471	2,566	17,321
1995.....	36,282	5,561	84	151	...	1,667	23,789	6,383	5,528	16,712	5,322	13,064	1,639	23,723	2,501	19,277
1996.....	36,118	5,362	93	140	...	1,594	22,861	6,208	5,343	15,905	5,070	12,607	1,727	22,585	2,366	21,104
1997.....	34,873	4,746	87	136	...	1,603	21,170	5,935	5,142	13,632	4,713	11,074	1,861	20,954	2,091	20,284
1998.....	40,649	4,273	135	126	...	1,646	18,555	4,965	4,342	12,158	5,285	9,381	1,225	19,338	2,011	34,820
Amount (in millions)																
1972.....	\$6,300	\$2,557	\$113	...	...	\$1,471	\$794	\$170	\$59	\$365	\$41	\$81	\$24	\$512	...	\$112
1975.....	12,242	3,374	405	\$380	\$1,885	2,434	1,225	339	127	373	389	126	70	815	\$67	233
1980.....	23,311	6,412	775	1,989	4,202	3,685	1,875	462	198	1,101	320	121	332	1,318	81	440
1985.....	37,508	9,453	1,192	4,731	6,516	5,071	2,346	458	251	1,789	714	337	1,120	2,315	195	1,020
1986.....	41,005	10,364	1,113	5,072	6,773	5,660	2,547	531	252	1,980	807	424	1,352	2,692	226	1,212
1987.....	45,050	11,302	1,409	5,591	7,280	5,967	2,776	541	263	2,226	963	475	1,690	2,988	228	1,349
1988.....	48,710	12,076	1,375	6,022	7,923	6,354	2,953	577	284	2,413	1,105	543	2,015	3,294	206	1,569
1989.....	54,500	13,378	1,470	6,649	8,871	6,660	3,408	498	317	2,837	1,249	590	2,572	3,689	227	2,085
1990.....	64,859	16,674	1,714	7,354	9,667	8,026	4,018	593	372	3,324	1,688	721	3,404	4,420	265	2,618
1991.....	77,048	19,891	2,010	7,680	...	20,709	4,952	710	437	4,283	2,211	897	4,101	5,424	359	3,384
1992.....	90,814	23,503	2,196	8,550	...	23,544	6,102	851	538	5,279	2,818	1,035	4,886	6,765	500	4,243
1993.....	101,709	25,734	2,161	8,831	...	25,431	6,952	961	937	6,215	3,457	1,137	5,601	7,970	538	5,784
1994.....	108,270	26,180	2,057	8,347	...	27,095	7,189	969	1,040	6,342	3,747	1,176	7,042	8,875	516	7,695
1995.....	120,141	26,331	2,511	10,383	...	29,052	7,360	1,019	986	6,627	4,280	1,180	9,406	9,791	514	10,700
1996.....	121,685	25,176	2,040	9,555	...	29,630	7,238	1,028	1,094	6,504	4,222	1,208	10,868	10,697	474	11,948
1997.....	124,429	23,143	2,009	9,798	...	30,504	7,041	1,036	979	6,169	4,252	1,033	12,237	11,972	418	12,958
1998.....	142,318	21,499	2,801	9,482	...	31,892	6,070	901	587	5,759	3,921	939	2,702	13,522	449	38,747
Average amount																
1972.....	\$358	\$903	\$2,825	...	...	\$2,665	\$65	\$71	\$37	\$70	\$82	\$23	\$229	\$46	...	\$44
1975.....	556	983	6,017	\$5,538	\$2,764	3,865	81	86	48	50	358	27	204	58	\$55	80
1980.....	1,079	1,742	11,697	16,439	5,322	6,079	136	99	61	113	113	38	846	96	72	172
1985.....	1,719	2,753	20,021	32,238	7,868	9,278	163	98	75	178	337	53	2,092	166	119	190
1986.....	1,821	2,924	20,952	35,089	8,182	9,910	171	103	73	185	398	60	2,278	183	130	217
1987.....	1,949	3,000	24,714	37,490	8,571	10,432	181	105	74	203	441	63	2,777	198	138	227
1988.....	2,126	3,151	22,956	41,413	9,153	10,971	193	114	82	229	490	72	3,542	215	135	238
1989.....	2,318	3,208	16,397	44,999	9,994	11,809	217	118	89	250	523	76	4,225	232	145	286
1990.....	2,568	3,630	18,548	50,048	11,236	13,356	235	130	96	269	602	80	4,733	256	151	315
1991.....	2,725	3,922	30,948	52,750	...	13,811	256	136	102	303	630	85	5,048	277	164	328
1992.....	2,936	4,075	28,364	56,502	...	14,965	282	149	114	349	685	88	5,283	307	196	342
1993.....	3,042	4,366	28,948	59,156	...	15,798	293	156	179	378	714	88	5,250	333	212	385
1994.....	3,089	4,463	24,120	52,571	...	16,533	296	153	192	383	713	88	5,445	363	201	444
1995.....	3,311	4,735	29,847	68,613	...	17,424	309	160	178	397	804	90	5,740	413	206	555
1996.....	3,369	4,696	21,873	68,232	...	18,589	317	166	205	409	833	96	6,293	474	200	566
1997.....	3,568	4,877	22,990	72,033	...	19,029	333	275	190	453	902	93	6,575	571	200	639
1998.....	3,501	5,031	20,701	74,960	...	19,379	327	182	135	474	742	100	2,206	699	223	1,113

<sup>1</sup> Fiscal year 1977 began in October 1976 and was the first year of the new federal fiscal cycle. Before 1977, the fiscal year began in July.

<sup>2</sup> Beginning in fiscal year 1980, recipients' categories do not add to unduplicated total because of the small number of recipients that are in more than one category during the year.

<sup>3</sup> Beginning in fiscal year 1991, "Nursing facility services" category combines "ICF, All other" and "Skilled nursing facility services," which were previously separate. Data under "Nursing facility services" prior to 1991, reflect "Skilled nursing facility services."

CONTACT: Tony Parker (410) 786-0155 for further information.

## 8.E Medicaid: Recipient

Table 8.E2.—Unduplicated number of recipients, total vendor payments, and average amounts, by type of eligibility category, fiscal years 1972–1998<sup>1, 2</sup>

Fiscal year	Total	Aged 65 or older	Blind	Permanent and total disability	Dependent children under age 21	Adults in families with dependent children	Other
Number (in thousands)							
1972.....	17,606	3,318	108	1,625	7,841	3,137	1,576
1975.....	22,007	3,615	109	2,355	9,598	4,529	1,800
1980.....	21,605	3,440	92	2,819	9,333	4,877	1,499
1985.....	21,814	3,061	80	2,937	9,757	5,518	1,214
1986.....	22,515	3,140	82	3,100	10,029	5,647	1,362
1987.....	23,109	3,224	85	3,296	10,168	5,599	1,418
1988.....	22,907	3,159	86	3,401	10,037	5,503	1,343
1989.....	23,511	3,132	95	3,496	10,318	5,717	1,175
1990.....	25,255	3,202	83	3,635	11,220	6,010	1,105
1991.....	28,280	3,359	85	3,983	13,415	6,778	658
1992.....	30,926	3,742	84	4,378	15,104	6,954	664
1993.....	33,432	3,863	84	4,932	16,285	7,505	763
1994.....	35,053	4,035	87	5,372	17,194	7,586	779
1995.....	36,282	4,119	92	5,767	17,164	7,604	1,537
1996.....	36,118	4,285	95	6,126	16,739	7,127	1,746
1997.....	34,872	3,955	...	6,129	15,791	6,803	2,195
1998.....	40,649	3,964	...	6,638	18,964	7,908	3,176
Amount (in millions)							
1972.....	\$6,300	\$1,925	\$45	\$1,354	\$1,139	\$962	\$875
1975.....	12,242	4,358	93	3,052	2,186	2,062	492
1980.....	23,311	8,739	124	7,497	3,123	3,231	596
1985.....	37,508	14,096	249	13,203	4,414	4,746	798
1986.....	41,005	15,097	277	14,635	5,135	4,880	980
1987.....	45,050	16,037	309	16,507	5,508	5,592	1,078
1988.....	48,710	17,135	344	18,250	5,848	5,883	1,198
1989.....	54,500	18,558	409	20,476	6,892	6,897	1,268
1990.....	64,859	21,508	434	23,969	9,100	8,590	1,257
1991.....	77,048	25,453	475	27,798	11,690	10,439	1,193
1992.....	90,814	29,078	530	33,326	14,491	12,185	1,204
1993.....	101,709	31,554	589	38,065	16,504	13,605	1,391
1994.....	108,270	33,618	644	41,654	17,302	13,585	1,467
1995.....	120,141	36,527	848	48,570	17,976	13,511	2,708
1996.....	121,685	36,947	869	51,196	17,544	12,275	2,853
1997.....	124,430	37,721	...	54,130	17,544	12,307	2,727
1998.....	142,318	40,602	...	60,375	22,806	14,833	3,702
Average amount							
1972.....	\$358	\$580	\$417	\$833	\$145	\$307	\$555
1975.....	556	1,205	850	1,296	228	455	273
1980.....	1,079	2,540	1,358	2,659	335	663	398
1985.....	1,719	4,605	3,104	4,496	452	860	658
1986.....	1,821	4,808	3,401	4,721	512	864	719
1987.....	1,949	4,975	3,644	5,008	542	999	761
1988.....	2,126	5,425	4,005	5,366	583	1,069	891
1989.....	2,318	5,926	4,317	5,858	668	1,206	1,079
1990.....	2,568	6,717	5,212	6,595	811	1,429	1,138
1991.....	2,725	7,577	5,572	6,979	871	1,540	1,813
1992.....	2,936	7,770	6,298	7,612	959	1,752	1,813
1993.....	3,042	8,168	7,036	7,717	1,013	1,813	1,824
1994.....	3,089	8,331	7,412	7,755	1,006	1,791	1,884
1995.....	3,311	8,868	9,256	8,422	1,047	1,777	1,762
1996.....	3,369	8,622	9,143	8,357	1,048	1,722	1,635
1997.....	3,568	9,538	...	8,832	1,111	1,809	3,597
1998.....	3,501	10,242	...	9,095	1,203	1,876	1,166

<sup>1</sup> Fiscal year 1977 began in October 1976 and was the first year of the new federal fiscal cycle. Before 1977, the fiscal year began in July.

<sup>2</sup> Beginning in fiscal year 1980, recipients' categories do not add to unduplicated total because of the small number of recipients that are in more than one category during the year.

Table 8.H1—Number of recipients, amount of payments, and average amount per recipient, by state, fiscal year 1998

State	Recipients	Amount (in millions)	Average amount
Total .....	40,649,482	\$142,318	\$3,501
Alabama.....	527,078	1,902	3,609
Alaska.....	74,508	330	4,434
Arizona.....	507,668	1,644	3,238
Arkansas.....	424,727	1,376	3,239
California.....	7,082,175	14,237	2,010
Colorado.....	344,916	1,439	4,173
Connecticut.....	381,208	2,421	6,350
Delaware.....	101,436	420	4,138
District of Columbia.....	166,146	731	4,402
Florida.....	1,904,591	5,687	2,986
Georgia.....	1,221,978	3,012	2,466
Hawaii.....	184,614	507	2,749
Idaho.....	123,176	425	3,446
Illinois.....	1,363,856	6,173	4,526
Indiana.....	607,293	2,564	4,222
Iowa.....	314,936	1,289	4,092
Kansas.....	241,933	916	3,788
Kentucky.....	644,482	2,425	3,763
Louisiana.....	720,615	2,384	3,308
Maine.....	170,456	747	4,383
Maryland.....	561,085	2,489	4,437
Massachusetts.....	908,238	4,609	5,075
Michigan.....	1,362,890	4,345	3,188
Minnesota.....	538,413	2,924	5,432
Mississippi.....	485,767	1,442	2,969
Missouri.....	734,015	2,570	3,501
Montana.....	100,760	361	3,585
Nebraska.....	211,188	753	3,566
Nevada.....	128,144	462	3,606
New Hampshire.....	93,970	606	6,449
New Jersey.....	813,251	4,219	5,188
New Mexico.....	329,418	862	2,617
New York.....	3,073,241	24,299	7,907
North Carolina.....	1,167,988	4,014	3,437
North Dakota.....	62,280	341	5,476
Ohio.....	1,290,776	6,121	4,742
Oklahoma.....	342,475	1,178	3,439
Oregon.....	511,171	1,378	2,695
Pennsylvania.....	1,523,120	6,080	3,992
Rhode Island.....	153,130	919	6,004
South Carolina.....	594,962	2,019	3,393
South Dakota.....	89,537	356	3,974
Tennessee.....	1,843,661	3,167	1,718
Texas.....	2,324,810	7,140	3,071
Utah.....	215,801	619	2,867
Vermont.....	123,992	351	2,834
Virginia.....	653,236	2,118	3,243
Washington.....	1,413,208	2,044	1,447
West Virginia.....	342,668	1,243	3,628
Wisconsin.....	518,595	2,206	4,255
Wyoming.....	46,121	192	4,163
Outlying areas:			
Puerto Rico.....	964,015	250	259
Virgin Islands.....	19,764	10	511

CONTACT: Tony Parker (410) 786-0155 for further information.

## 9.A Unemployment Insurance

### Table 9.A2.—Summary data on state programs, 1999

[Except where noted excludes data for federal employees and for ex-servicemembers; includes data for state and local government employees where covered by state law after 1955]

State	Covered employment (excludes federal government)		Insured unemployment as percent of covered employment <sup>1</sup>	Number of first payments	Average weekly benefit for total unemployment		Average weekly insured unemployment	Average actual duration (in weeks)	Claimants exhausting benefits <sup>2</sup>		Contributions collected (in millions) <sup>3</sup>	Benefits paid (in millions) <sup>4</sup>	Average employer contribution rate (percent) <sup>5</sup>
	Average number of workers (in thousands)	Total payroll <sup>6</sup> (in millions)			Amount <sup>7</sup>	Percent of average weekly wages <sup>8</sup>			Number	Percent of first payments <sup>2</sup>			
Total..	125,334	\$4,130,377	1.8	6,951,210	\$211.75	33.1	2,187,932	14.5	2,300,128	31.4	\$19,153.8	\$20,270.5	1.8
AL.....	1,818	50,209	1.6	127,895	155.55	29.3	28,382	10.1	26,912	19.9	159.1	192.2	1.1
AK.....	252	8,381	5.1	45,635	181.58	28.4	12,866	14.9	19,252	41.9	105.3	122.8	2.5
AZ.....	2,104	63,718	1.0	70,638	157.31	27.0	21,228	14.3	22,447	31.8	173.2	150.3	1.1
AR.....	1,092	27,408	2.3	76,981	197.20	40.9	24,939	13.0	24,341	29.2	175.6	162.4	2.0
CA.....	14,135	528,918	2.6	1,047,526	158.21	22.0	366,976	16.4	412,584	38.2	2,693.0	2,634.5	2.7
CO.....	2,051	69,588	.8	55,494	240.96	36.9	15,908	12.1	20,316	36.6	191.3	158.6	1.0
CT.....	1,630	69,783	1.9	109,049	225.36	27.4	31,248	14.6	27,530	24.2	380.7	372.4	1.8
DE.....	397	13,901	1.4	22,525	203.70	30.3	5,503	12.6	4,534	19.6	63.7	56.4	2.1
DC.....	432	20,506	1.5	17,190	235.01	25.7	6,455	19.7	9,425	51.8	88.4	60.1	2.3
FL.....	6,720	192,543	1.1	223,361	211.84	38.4	73,090	14.0	94,332	39.8	549.5	670.4	1.2
GA.....	3,708	118,993	.9	163,110	198.70	32.2	32,573	9.0	45,919	27.2	154.3	280.7	.5
HI.....	508	14,728	2.1	30,754	277.63	49.8	10,706	16.4	9,921	28.9	135.7	129.6	1.7
ID.....	530	13,618	2.4	43,733	200.43	40.5	12,457	12.5	12,536	27.5	79.6	101.5	1.2
IL.....	5,756	208,105	1.8	307,325	241.16	34.7	104,015	15.9	92,449	30.2	1,121.8	1,169.0	2.4
IN.....	2,867	85,648	1.0	111,817	210.31	36.6	28,575	11.3	34,135	26.7	266.5	270.5	1.4
IA.....	1,412	37,820	1.3	80,519	227.05	44.1	17,909	10.8	14,073	17.8	152.5	180.3	1.0
KS.....	1,273	35,355	1.2	52,947	237.48	44.5	14,680	12.9	15,867	31.1	42.5	158.0	.3
KY.....	1,696	46,709	1.5	103,664	201.03	38.0	24,945	12.1	18,543	16.9	238.5	240.4	1.8
LA.....	1,812	48,798	1.4	73,959	162.10	31.3	25,930	15.3	21,765	29.3	166.4	186.7	1.5
ME.....	560	14,856	1.8	32,599	192.30	37.7	9,816	13.0	13,376	34.6	128.5	81.4	3.6
MD.....	2,220	74,475	1.4	96,934	204.78	31.7	30,246	13.5	27,069	27.2	284.2	271.0	1.6
MA.....	3,133	126,114	2.1	181,671	278.86	36.0	66,242	17.0	59,382	31.3	785.0	822.4	2.3
MI.....	4,446	158,447	1.8	323,015	237.88	34.7	79,736	11.5	84,055	21.3	990.2	879.9	2.7
MN.....	2,517	83,990	1.2	100,147	278.76	43.4	29,944	14.0	26,306	24.8	344.8	356.6	1.1
MS.....	1,113	26,744	1.6	54,780	153.30	33.2	18,365	13.7	14,618	25.1	122.6	110.2	1.7
MO.....	2,588	76,897	1.5	132,136	174.57	30.6	40,110	13.1	35,010	25.7	268.4	293.2	1.4
MT.....	358	8,144	2.2	24,517	181.04	41.4	7,830	13.8	7,423	28.6	61.5	56.1	1.3
NE.....	851	22,450	.8	25,996	177.13	34.9	6,989	12.1	7,811	27.1	32.0	54.8	.6
NV.....	962	29,838	1.9	65,028	215.61	36.1	18,327	13.8	19,646	31.0	211.8	192.3	1.4
NH.....	583	18,664	.6	15,380	208.27	33.8	3,704	9.6	775	4.8	28.1	35.4	.7
NJ.....	3,719	151,570	2.4	255,979	277.02	35.3	91,039	17.2	117,080	44.4	1,061.8	1,076.8	1.9
NM.....	671	17,217	1.6	30,032	178.06	36.1	10,956	16.2	10,915	33.8	83.2	85.7	1.2
NY.....	8,156	343,441	1.9	416,634	231.93	28.6	157,548	17.7	209,016	45.5	1,485.7	1,639.3	2.7
NC.....	3,743	109,645	1.4	215,968	218.71	38.8	51,266	10.0	40,120	18.7	327.0	428.3	.8
ND.....	297	6,953	1.4	11,925	201.35	44.7	4,098	14.9	4,455	34.8	31.7	39.9	1.1
OH.....	5,368	167,392	1.3	228,265	224.04	37.4	68,074	13.2	46,542	17.8	631.9	687.8	1.5
OK.....	1,376	34,703	1.0	44,883	208.67	43.0	14,200	13.9	13,531	26.8	51.7	120.6	.4
OR.....	1,547	47,389	2.7	142,505	223.45	37.9	42,374	14.5	39,854	27.1	471.9	429.2	2.1
PA.....	5,387	174,537	2.5	402,078	250.56	40.2	136,528	15.7	102,613	24.5	1,393.5	1,350.5	3.7
RI.....	446	13,763	2.9	43,505	245.73	41.4	13,155	13.2	13,562	30.2	159.3	140.6	3.3
SC.....	1,763	47,453	1.5	96,434	185.48	35.8	25,694	11.3	22,846	22.9	161.9	194.4	1.4
SD.....	345	8,052	.6	7,657	170.05	37.9	2,115	11.0	815	9.7	12.6	15.9	.6
TN.....	2,575	75,263	1.6	150,970	183.95	32.7	39,943	11.9	45,392	27.9	269.7	323.0	1.5
TX.....	8,830	288,791	1.4	358,590	225.36	35.8	124,619	15.9	201,647	54.6	932.4	1,189.4	1.2
UT.....	987	27,139	1.0	38,217	205.20	38.8	10,108	12.1	11,907	30.5	78.7	97.6	.6
VA.....	3,176	102,665	.7	92,254	186.91	30.1	22,200	10.2	20,533	20.9	140.5	178.6	.6
VT.....	282	7,728	1.9	17,836	203.40	38.7	5,276	13.3	2,525	13.8	48.5	45.4	2.5
WA.....	2,575	91,543	3.0	190,056	275.82	40.3	77,627	18.4	64,095	35.0	864.1	905.7	2.2
WV.....	659	16,814	2.4	52,317	197.98	40.4	16,090	13.6	10,566	19.4	128.3	128.6	2.9
WI.....	2,662	78,482	1.9	209,497	223.46	39.4	50,277	11.8	36,982	17.1	426.8	474.8	1.9
WY.....	218	5,492	1.4	10,947	200.61	41.4	3,126	13.2	2,914	25.3	22.8	27.1	1.5
Other:													
PR ..	988	17,969	5.2	116,746	102.82	29.4	51,431	19.3	59,225	43.7	170.9	237.2	3.3
VI....	40	1,027	1.2	1,590	172.64	35.3	496	14.7	641	34.2	4.0	3.8	1.6

<sup>1</sup> Based on average covered employment in 12-month period.

<sup>2</sup> Percentages based on first payments for 12-month period.

<sup>3</sup> Contributions, penalties, and interest from employers and contributions from employees in states taxing workers. Adjusted to exclude refunds of contributions and dishonored checks. Excludes state and local government employees covered on reimbursable basis.

<sup>4</sup> Adjusted to exclude voided benefit checks and for transfers under interstate combined-wage plan. Excludes Extended Benefits and Emergency Unemployment Compensation.

<sup>5</sup> Estimated data. As percent of taxable payroll. Standard contribution rate for most states, 2.7 percent. Excludes state and local jurisdictions covering state and local government employees on a reimbursable basis.

<sup>6</sup> Total wages earned in covered employment during all pay periods ended within the year.

<sup>7</sup> Includes dependents' allowances for states that provide such benefits.

<sup>8</sup> Based on average total weekly wage in current year.

Source: Department of Labor, Employment and Training Administration and Bureau of Labor Statistics; based on data submitted by state agencies.

CONTACT: Cindy Ambler (202) 693-3177 for further information.



Table 9.A2.—Summary data on state programs, 2000

[Except where noted excludes data for federal employees and for ex-servicemembers; includes data for state and local government employees where covered by state law after 1955]

State	Covered employment (excludes federal government)		Insured unemployment as percent of covered employment <sup>1</sup>	Number of first payments	Average weekly benefit for total unemployment		Average weekly insured unemployment	Average actual duration (in weeks)	Claimants exhausting benefits <sup>2</sup>		Contributions collected (in millions) <sup>3</sup>	Benefits paid (in millions) <sup>4</sup>	Average employer contribution rate (percent) <sup>5</sup>
	Average number of workers (in thousands)	Total payroll <sup>6</sup> (in millions)			Amount <sup>7</sup>	Percent of average weekly wages <sup>8</sup>			Number	Percent of first payments <sup>2</sup>			
Total..	127,858	\$4,464,095	1.7	7,033,133	\$221.00	32.9	2,110,279	13.7	2,143,989	31.8	\$19,899.3	\$20,276.9	1.8
AL.....	1,824	52,054	1.6	133,933	159.41	29.1	29,046	9.9	26,847	21.5	158.2	202.9	1.1
AK.....	259	8,856	4.8	43,557	189.86	28.8	12,290	14.2	16,962	39.2	110.9	110.5	2.7
AZ.....	2,173	70,326	.9	69,104	162.51	26.1	20,527	14.0	23,333	33.5	170.9	154.3	1.1
AR.....	1,108	28,841	2.2	80,163	210.08	42.0	23,885	11.8	22,722	30.8	175.8	169.6	1.9
CA.....	14,615	600,346	2.3	973,333	160.00	20.3	338,454	15.9	370,790	37.1	2,836.8	2,406.7	2.7
CO.....	2,132	78,692	.7	51,952	255.86	36.0	15,034	12.0	20,506	39.0	186.1	157.7	.9
CT.....	1,653	75,154	1.7	102,837	257.56	29.5	28,347	14.1	24,483	23.3	312.7	348.9	1.5
DE.....	403	14,749	1.5	26,978	214.85	30.5	5,870	11.9	4,988	19.9	59.1	74.2	1.8
DC.....	453	22,506	1.3	15,164	241.03	25.2	5,705	19.6	8,230	49.6	99.7	61.2	2.3
FL.....	6,939	210,178	1.0	224,212	220.21	37.8	70,767	13.3	86,357	39.8	398.3	661.7	.8
GA.....	3,798	128,867	.9	177,902	211.89	32.5	34,467	8.7	42,699	27.2	132.3	317.0	.5
HI.....	523	15,544	1.6	25,247	283.67	49.6	8,389	15.4	7,058	25.5	139.6	101.6	1.7
ID.....	550	15,055	2.2	45,292	209.46	39.8	12,101	11.7	11,719	25.8	90.4	102.8	1.2
IL.....	5,840	221,450	1.8	309,386	251.58	34.5	103,824	15.8	91,236	30.7	1,093.1	1,212.2	2.2
IN.....	2,893	89,263	1.1	129,325	222.19	37.4	31,768	10.7	35,548	32.2	277.1	310.8	1.4
IA.....	1,423	39,507	1.4	84,455	238.42	44.7	19,407	11.2	15,626	19.3	175.7	210.3	1.2
KS.....	1,286	37,400	1.2	54,263	247.09	44.2	15,635	13.3	16,641	33.5	143.0	173.9	1.1
KY.....	1,724	49,322	1.5	111,252	224.78	40.8	25,421	11.5	18,296	18.5	248.9	271.4	1.9
LA.....	1,832	50,530	1.3	71,852	182.06	34.3	23,972	14.5	22,561	32.7	117.1	182.0	1.3
ME.....	577	15,715	1.5	28,203	202.29	38.6	8,863	14.1	10,569	39.0	150.8	76.6	2.6
MD.....	2,278	80,643	1.3	92,798	212.51	31.2	28,881	13.4	25,996	27.5	274.6	271.1	1.5
MA.....	3,223	142,529	1.9	172,041	293.45	34.5	60,076	16.3	53,639	31.1	821.8	789.7	2.3
MI.....	4,527	167,108	1.8	358,509	244.12	34.4	81,550	10.6	80,809	25.5	1,016.5	921.5	2.7
MN.....	2,572	90,830	1.2	109,278	290.51	42.8	31,385	13.6	26,734	26.6	345.4	397.8	1.0
MS.....	1,110	27,530	1.8	60,187	156.62	32.8	19,663	13.6	16,108	29.9	114.9	122.0	1.5
MO.....	2,617	81,474	1.6	137,426	186.22	31.1	41,848	13.1	34,663	26.9	237.6	333.5	1.3
MT.....	367	8,658	2.1	25,194	187.92	41.4	7,798	13.0	7,216	30.6	55.8	57.8	1.1
NE.....	867	23,790	.8	27,838	188.00	35.6	7,323	11.6	8,179	32.2	42.3	59.4	.8
NV.....	1,003	32,158	1.9	67,949	222.43	36.1	19,534	13.8	21,190	32.8	213.3	204.3	1.3
NH.....	598	20,675	.5	13,595	217.21	32.7	3,108	9.0	817	5.9	30.7	31.1	.8
NJ.....	3,811	166,245	2.2	245,606	289.61	34.5	84,750	16.6	109,650	44.4	1,233.3	1,045.8	2.0
NM.....	687	18,444	1.4	27,492	180.43	34.9	9,475	15.2	8,594	30.6	84.9	72.9	1.2
NY.....	8,329	374,357	1.8	424,234	247.48	28.6	146,212	16.0	186,345	46.3	1,870.4	1,602.2	3.2
NC.....	3,795	117,380	1.4	256,360	231.21	38.9	54,345	8.9	42,564	18.5	300.5	474.6	.6
ND.....	300	7,296	1.3	11,800	210.01	44.8	3,855	14.0	4,282	37.6	37.7	40.2	1.3
OH.....	5,428	175,237	1.3	248,223	236.40	38.1	71,623	12.4	48,306	22.0	640.5	742.2	1.5
OK.....	1,404	37,032	.9	40,872	214.40	42.3	12,218	13.0	11,846	30.5	47.4	103.7	.4
OR.....	1,577	51,368	2.6	147,190	232.62	37.1	41,228	13.7	36,272	25.7	503.9	430.4	2.1
PA.....	5,446	184,011	2.4	396,227	264.76	40.7	132,350	15.2	96,622	24.8	1,400.3	1,461.6	3.7
RI.....	457	14,724	2.7	37,798	253.48	40.9	12,159	14.1	12,501	31.9	142.5	224.9	3.4
SC.....	1,790	50,058	1.5	101,066	190.18	35.4	27,053	10.9	22,586	24.8	170.7	136.4	3.2
SD.....	353	8,592	.6	7,791	180.86	38.6	2,043	10.0	642	9.0	13.5	203.7	1.4
TN.....	2,614	79,029	1.6	177,875	188.74	32.5	42,216	11.1	45,512	31.2	284.7	15.2	.6
TX.....	9,101	316,219	1.2	322,307	227.11	34.0	107,906	14.5	165,241	50.4	982.4	363.5	1.5
UT.....	1,012	29,132	1.0	40,584	213.89	38.6	10,522	11.8	11,571	30.5	61.4	988.7	1.3
VA.....	3,276	112,668	.7	95,607	203.88	30.8	22,233	9.8	21,975	25.2	149.3	3.0	2.6
VT.....	290	8,324	1.6	17,593	215.55	39.1	4,789	12.5	2,258	13.6	49.0	44.3	2.4
WA.....	2,638	97,229	2.7	205,411	280.94	39.6	70,580	16.2	57,301	29.0	919.2	196.9	.6
WV.....	664	17,491	2.1	48,884	197.53	39.0	14,067	12.6	8,808	19.1	132.1	872.8	2.1
WI.....	2,703	82,682	2.0	230,458	233.11	39.6	53,078	11.2	38,121	17.9	440.5	526.3	1.9
WY.....	223	5,898	1.3	10,833	207.01	40.8	2,867	11.8	2,494	25.2	23.3	26.3	1.4
Other:													
PR ..	1,012	18,666	4.9	114,649	103.91	29.3	49,437	18.7	57,994	48.8	175.7	224.9	3.4
VI....	41	1,120	.8	1,048	183.43	35.2	333	15.4	482	38.3	6.5	3.0	2.6

<sup>1</sup> Based on average covered employment in 12-month period.

<sup>2</sup> Percentages based on first payments for 12-month period.

<sup>3</sup> Contributions, penalties, and interest from employers and contributions from employees in states taxing workers. Adjusted to exclude refunds of contributions and dishonored checks. Excludes state and local government employees covered on reimbursable basis.

<sup>4</sup> Adjusted to exclude voided benefit checks and for transfers under interstate combined-wage plan. Excludes Extended Benefits and Emergency Unemployment Compensation.

<sup>5</sup> Estimated data. As percent of taxable payroll. Standard contribution rate for most states, 2.7 percent. Excludes state and local jurisdictions covering state and local government employees on a reimbursable basis.

<sup>6</sup> Total wages earned in covered employment during all pay periods ended within the year.

<sup>7</sup> Includes dependents' allowances for states that provide such benefits.

<sup>8</sup> Based on average total weekly wage in current year.

Source: Department of Labor, Employment and Training Administration and Bureau of Labor Statistics; based on data submitted by state agencies.

CONTACT: Cindy Ambler (202) 693-3177 for further information.

## 9.B Workers' Compensation

Table 9.B1.—Coverage, benefits, and costs, 1940–1999 <sup>1</sup>

Calendar year	Estimated number of workers covered per month (in millions)	Benefits paid during year (in millions)						Cost of program as a percentage of covered payroll <sup>2</sup>	Benefits as a percentage of covered payroll <sup>3</sup>
		Total	Type of insurance			Type of benefits			
			Insurance losses paid by private carriers <sup>4</sup>	State and federal fund disbursements <sup>5</sup>	Employers' self-insurance payments <sup>6</sup>	Medical and hospitalization	Compensation payments		
1940.....	24.6	\$256	\$135	\$73	\$48	\$95	\$161	1.19	0.72
1946.....	32.7	434	270	96	68	140	294	.91	.54
1948.....	36.0	534	335	121	78	175	359	.96	.51
1949.....	35.3	566	353	132	81	185	381	.98	.55
1950.....	36.9	615	381	149	85	200	415	.89	.54
1951.....	38.7	709	444	170	94	233	476	.90	.54
1952.....	39.4	785	491	193	101	260	525	.94	.55
1953.....	40.7	841	524	210	107	280	561	.97	.55
1954.....	39.8	876	540	225	110	308	568	.98	.57
1955.....	41.4	916	563	238	115	325	591	.91	.55
1956.....	43.0	1,002	618	259	125	350	652	.92	.55
1957.....	43.3	1,062	661	271	130	360	702	.91	.56
1958.....	42.5	1,112	694	285	132	375	737	.91	.58
1959.....	44.0	1,210	753	316	141	410	800	.89	.58
1960.....	44.9	1,295	810	325	160	435	860	.93	.59
1961.....	45.0	1,374	851	347	176	460	914	.95	.61
1962.....	46.2	1,489	924	371	194	495	994	.96	.62
1963.....	47.3	1,582	988	388	207	525	1,057	.99	.62
1964.....	48.8	1,707	1,070	412	226	565	1,142	1.00	.63
1965.....	50.8	1,814	1,124	445	244	600	1,214	1.00	.61
1966.....	53.7	2,000	1,239	486	275	680	1,320	1.02	.61
1967.....	55.0	2,189	1,363	524	303	750	1,439	1.07	.63
1968.....	56.8	2,376	1,482	556	338	830	1,546	1.07	.62
1969.....	59.0	2,634	1,641	607	386	920	1,714	1.08	.62
1970.....	59.2	3,031	1,843	755	432	1,050	1,981	1.11	.66
1971.....	59.4	3,563	2,005	1,098	460	1,130	2,433	1.11	.67
1972.....	62.3	4,061	2,179	1,379	504	1,250	2,811	1.14	.68
1973.....	66.3	5,103	2,514	1,998	592	1,480	3,623	1.17	.70
1974.....	68.0	5,781	2,971	2,086	724	1,760	4,021	1.24	.75
1975.....	67.2	6,598	3,422	2,324	852	2,030	4,568	1.32	.83
1976.....	69.6	7,584	3,976	2,570	1,039	2,380	5,204	1.49	.87
1977.....	72.1	8,630	4,629	2,750	1,250	2,680	5,950	1.71	.92
1978.....	75.6	9,796	5,256	3,043	1,497	2,980	6,816	1.86	.94
1979.....	78.6	12,027	6,157	4,022	1,848	3,520	8,507	1.95	1.01
1980.....	78.8	13,618	7,029	4,330	2,259	3,947	9,671	1.96	1.07
1981.....	78.3	15,054	7,876	4,595	2,583	4,431	10,623	1.85	1.08
1982.....	77.0	16,407	8,647	4,768	2,993	5,058	11,349	1.75	1.16
1983.....	78.0	17,575	9,265	5,061	3,249	5,681	11,894	1.67	1.17
1984.....	81.9	19,685	10,610	5,405	3,671	6,424	13,261	1.66	1.21
1985.....	84.3	22,217	12,341	5,744	4,132	7,498	14,719	1.82	1.30
1986.....	86.0	24,613	13,827	6,248	4,538	8,642	15,971	1.99	1.37
1987.....	88.4	27,318	15,453	6,782	5,082	9,912	17,406	2.07	1.43
1988.....	91.3	30,733	17,512	7,477	5,744	11,518	19,215	2.16	1.49
1989.....	93.7	34,316	19,918	7,965	6,433	13,424	20,892	2.04	1.46
1990.....	95.1	38,238	22,222	8,658	7,358	15,187	23,051	2.13	1.57
1991.....	93.6	42,169	24,515	9,711	7,944	16,832	25,337	2.16	1.65
1992.....	94.6	44,660	24,030	10,987	9,643	18,252	26,408	2.13	1.69
1993.....	96.1	42,925	21,773	11,294	9,857	17,521	25,403	2.17	1.62
1994.....	109.4	44,586	22,306	10,753	11,527	17,194	27,392	2.05	1.51
1995.....	112.8	43,373	21,145	10,996	11,232	16,733	26,640	1.83	1.39
1996.....	114.6	41,836	20,392	10,669	10,775	16,555	25,281	1.67	1.26
1997.....	117.7	41,147	20,978	10,294	9,875	15,701	25,445	1.47	1.15
1998.....	120.9	42,312	22,821	10,269	9,222	16,390	25,922	1.37	1.09
1999.....	123.9	43,371	23,813	10,221	9,337	18,043	25,329	1.29	1.05

<sup>1</sup> Beginning in 1959, includes Alaska and Hawaii.

<sup>2</sup> Premiums written by private carriers, and state funds and benefits paid by self-insurers increased by 5–11 percent to allow for administrative costs; also includes benefits paid and administrative costs of federal system for government employees.

<sup>3</sup> Excludes programs financed from general revenue—most federal Black Lung benefits.

<sup>4</sup> Net cash and medical benefits paid during calendar year by private insurance companies under standard workers' compensation policies.

<sup>5</sup> Net cash and medical benefits paid by competitive and exclusive state funds and by federal system for government employees and, beginning in 1970, cash benefits paid by federal Black Lung program.

<sup>6</sup> Cash and medical benefits paid by self-insurers, plus value of medical benefits paid by employers carrying workers' compensations policies that exclude standard medical coverage.

Source: National Academy of Social Insurance estimates based on data received from state agencies, the Department of Labor, A.M. Best Company and the National Council on Compensation Insurance.

CONTACT: Daniel Mont (202) 452-8097 for further information.

Table 9.B2.—Benefits, by state, 1996–1999

[In thousands]

State	1996	1997	1998	1999
Total 1 .....	\$41,835,949	\$41,146,574	\$42,311,540	\$43,371,412
Alabama.....	525,073	530,230	615,316	596,233
Alaska.....	121,597	130,045	128,576	137,630
Arizona.....	458,593	427,885	417,673	427,841
Arkansas.....	160,328	157,128	163,733	165,854
California.....	6,829,656	7,073,544	7,374,486	7,856,442
Colorado.....	679,270	674,035	656,894	702,458
Connecticut.....	672,241	731,830	711,130	722,156
Delaware.....	121,154	120,719	118,511	105,436
District of Columbia.....	89,945	81,696	75,800	82,011
Florida.....	2,706,603	2,318,086	2,207,984	2,079,830
Georgia.....	821,952	713,041	807,582	816,249
Hawaii.....	288,495	254,995	233,491	211,138
Idaho.....	189,575	212,563	237,444	230,218
Illinois.....	1,643,487	1,576,695	1,687,070	1,719,617
Indiana.....	409,901	437,797	482,029	522,237
Iowa.....	260,628	273,028	292,002	283,983
Kansas.....	269,507	312,698	318,352	326,196
Kentucky.....	506,771	380,417	410,003	430,953
Louisiana.....	557,131	419,777	428,441	428,808
Maine.....	314,116	271,307	246,145	249,674
Maryland.....	1,037,957	1,082,280	1,127,128	1,169,386
Massachusetts.....	700,375	653,327	641,409	633,840
Michigan.....	1,346,409	1,332,222	1,366,963	1,392,806
Minnesota.....	739,500	738,100	732,300	744,600
Mississippi.....	224,341	231,340	234,700	253,532
Missouri.....	618,911	527,053	589,232	592,993
Montana.....	149,540	167,812	170,715	145,306
Nebraska.....	198,923	184,673	181,816	173,149
Nevada.....	382,873	341,203	334,659	362,971
New Hampshire.....	188,262	155,397	163,885	170,876
New Jersey.....	930,724	923,460	954,696	987,378
New Mexico.....	151,299	119,893	116,819	117,168
New York.....	2,558,704	2,618,320	2,556,658	2,782,474
North Carolina.....	500,506	618,426	765,817	710,100
North Dakota.....	66,819	76,617	81,403	77,236
Ohio.....	2,146,314	2,030,046	2,068,878	2,018,923
Oklahoma.....	645,329	547,355	520,181	465,231
Oregon.....	445,505	417,222	432,825	398,965
Pennsylvania.....	2,533,788	2,471,021	2,418,072	2,441,255
Rhode Island.....	135,520	138,211	145,252	152,861
South Carolina.....	371,724	459,377	483,606	511,735
South Dakota.....	82,063	73,862	72,722	80,331
Tennessee.....	432,422	432,662	517,846	514,242
Texas.....	1,259,647	1,377,393	1,488,896	1,677,824
Utah.....	224,146	192,381	220,247	219,338
Vermont.....	74,271	87,488	95,056	103,928
Virginia.....	560,309	534,350	591,068	581,357
Washington.....	1,192,926	1,234,495	1,309,371	1,418,255
West Virginia.....	523,803	616,790	629,480	665,403
Wisconsin.....	647,520	594,463	621,973	652,281
Wyoming.....	73,592	68,068	74,469	71,151
Federal programs:				
Civilian employee.....	1,911,682	1,900,963	1,955,287	2,008,909
Black lung 2 .....	1,154,222	1,102,798	1,035,450	980,642

1 Calendar year data, except fiscal year data for federal civilian and other programs and for some states with state funds. Payments represent compensation and medical benefits and include insurance losses paid by private insurance carriers (compiled from state workers' compensation agencies and the A.M. Best Company); disbursement of state funds (compiled from the A.M. Best Company, state workers' compensation agencies and U.S. Census Bureau); and self-insurance payments, estimated from available state data. Includes benefit payments under Longshore and Harbor Workers' Compensation Act for states in which such payments are made. For data for years 1990, 1993–95, see U.S. Census Bureau, *Statistical Abstract of the United States: 1999* (119th edition) Washington, DC, 1999, table 630, p.397.

2 Includes payments by the Social Security Administration and the Department of Labor.

Source: National Academy of Social Insurance estimates based on data received from state agencies, the Department of Labor, A.M. Best Company and the National Council on Compensation Insurance.

CONTACT: Daniel Mont (202) 452-8097 for further information.

## 9.B Workers' Compensation

Table 9.B3.—Type of insurer and medical benefits, by state, 1999

[In thousands]

State	Total	Private carriers <sup>4</sup>	State funds	Self-insurance <sup>1</sup>	Medical amount	Medical percent
Total .....	\$43,371,412	...	...	...	\$18,042,726	41.6
Alabama.....	596,233	\$320,786	...	\$275,447	309,392	51.9
Alaska.....	137,630	108,604	...	29,026	73,456	53.4
Arizona.....	427,841	191,455	\$174,825	61,561	149,956	<sup>2</sup> 35.0
Arkansas.....	165,854	110,673	...	55,182	71,317	<sup>3</sup> 43.0
California.....	7,856,442	4,611,639	1,002,435	2,242,368	3,506,531	44.6
Colorado.....	702,458	330,465	181,449	190,543	348,110	<sup>2</sup> 49.6
Connecticut.....	722,156	553,612	...	168,544	196,079	<sup>2</sup> 27.2
Delaware.....	105,436	78,243	...	27,193	45,337	<sup>3</sup> 43.0
District of Columbia.....	82,011	64,157	...	17,853	35,265	<sup>3</sup> 43.0
Florida.....	2,079,830	1,668,092	...	411,738	1,277,633	61.4
Georgia.....	816,249	450,288	...	365,961	487,804	59.8
Hawaii.....	211,138	144,706	5,223	61,209	86,574	40.9
Idaho.....	230,218	141,392	77,754	11,072	111,303	48.3
Illinois.....	1,719,617	1,353,213	...	366,405	828,341	<sup>2</sup> 48.2
Indiana.....	522,237	391,347	...	130,890	343,188	<sup>2</sup> 65.7
Iowa.....	283,983	236,098	...	47,885	159,420	<sup>2</sup> 56.1
Kansas.....	326,196	236,753	...	89,443	113,239	34.7
Kentucky.....	430,953	260,222	20,420	150,310	229,300	53.2
Louisiana.....	428,808	207,532	101,602	119,674	184,387	<sup>3</sup> 43.0
Maine.....	249,674	106,619	48,183	94,872	93,731	37.7
Maryland.....	1,169,386	905,032	158,165	106,188	493,481	42.2
Massachusetts.....	633,840	515,852	...	117,988	202,341	31.9
Michigan.....	1,392,806	760,306	...	632,500	413,859	29.7
Minnesota.....	744,600	479,400	88,100	177,100	315,700	42.4
Mississippi.....	253,532	162,808	...	90,724	132,971	52.4
Missouri.....	592,993	506,218	43,357	43,418	363,761	59.5
Montana.....	145,306	53,222	60,962	31,121	62,482	<sup>3</sup> 43.0
Nebraska.....	173,149	131,579	...	41,570	86,079	49.7
Nevada.....	362,971	4,649	273,386	84,935	125,871	34.7
New Hampshire.....	170,876	134,339	...	36,537	88,787	<sup>2</sup> 52.0
New Jersey.....	987,378	937,022	...	50,356	424,573	<sup>3</sup> 43.0
New Mexico.....	117,168	60,348	12,036	44,784	65,857	56.2
New York.....	2,782,474	1,314,422	836,453	631,599	835,726	30.0
North Carolina.....	710,100	534,710	...	175,390	327,739	<sup>2</sup> 46.2
North Dakota.....	77,236	428	76,808	...	36,201	46.9
Ohio.....	2,018,923	18,104	1,571,004	429,815	803,675	39.8
Oklahoma.....	465,231	261,595	105,621	98,015	221,583	<sup>2</sup> 47.6
Oregon.....	398,965	202,220	145,285	51,460	190,422	47.7
Pennsylvania.....	2,441,255	1,692,089	176,004	573,162	867,097	35.5
Rhode Island.....	152,861	98,356	43,409	11,096	35,306	23.1
South Carolina.....	511,735	358,012	37,100	116,623	247,866	<sup>2</sup> 48.4
South Dakota.....	80,331	69,408	...	10,923	38,915	48.4
Tennessee.....	514,242	404,946	...	109,296	264,953	<sup>2</sup> 51.5
Texas.....	1,677,824	1,353,079	185,305	139,441	721,464	<sup>3</sup> 43.0
Utah.....	219,338	133,718	67,987	17,633	152,456	69.5
Vermont.....	103,928	78,652	...	25,276	51,214	<sup>2</sup> 49.3
Virginia.....	581,357	441,457	...	139,900	214,004	36.8
Washington.....	1,418,255	20,873	1,117,017	280,365	475,492	33.5
West Virginia.....	665,403	3,894	552,302	109,207	176,139	26.5
Wisconsin.....	652,281	609,039	...	43,242	342,874	<sup>2</sup> 52.6
Wyoming.....	71,151	1,432	69,719	...	45,068	63.3
Total without federal.....	40,381,861	23,813,108	7,231,914	9,336,839	17,474,320	43.3
Total federal.....	2,989,551	...	...	...	568,406	19.0
Civilian employee.....	2,008,909	...	...	...	492,835	24.5
Black Lung.....	980,642	...	...	...	75,571	7.7

<sup>1</sup> Self-insurance includes individual self-insurers and group self-insurance.

<sup>2</sup> Imputed based on regression analysis using data from states where the percentage was known. The independent variables used in regression were percent of private carrier incurred losses that is attributed to medical benefits, the market insured by private carriers, and the presence of a state fund.

<sup>3</sup> For these states, the data used for the imputation procedure were unavailable, so the percentage of medical benefits was estimated to be the weighted average of the percentages in the states reporting such a percentage.

<sup>4</sup> States with exclusive funds (Nevada, North Dakota, Ohio, Washington, West Virginia and Wyoming), also have small amounts of benefits paid in the private carrier category. This results from two sources: companies with group policies that overlap states and the fact that some companies include excess workers' compensation coverage in their reports of workers' compensation benefits to A.M. Best Company.

Source: National Academy of Social Insurance estimates based on data received from state agencies, the Department of Labor, A.M. Best Company, and the National Council on Compensation Insurance.

CONTACT: Daniel Mont (202) 452-8097 for further information.

Table 9.C1.—Selected data on state and railroad programs, 1998

Program <sup>1</sup>	Average annual covered employment (in thousands)	Taxable payrolls (in millions)	Average weekly number of beneficiaries (in thousands)	Average weekly benefit	Average duration (weeks) per period paid	Contributions collected (in millions)	Net benefits paid (in millions)	Administrative expenditures (in millions) <sup>2</sup>
California <sup>3</sup>	11,916	\$271,500	(4)	(4)	(4)	(4)	\$1,793.0	\$173.0
State-operated fund.....	11,371	252,500	80.0	\$229.74	12.14	\$1,207.5	1,645.0	145.4
Private plans .....	546	18,900	(4)	352.06	10.46	136	148.0	28.0
Hawaii <sup>5</sup> (private plans) .....	263	5,347	24.9	365.00	3.16	35.6	28.7	(4)
New Jersey <sup>6</sup>	<sup>7</sup> 3,341	(4)	(4)	(4)	(4)	(4)	452.5	29.8
State-operated fund.....	<sup>7</sup> 2,676	<sup>7</sup> 45,100	(4)	282.00	(4)	352.5	319.0	28.1
Private plans .....	<sup>7</sup> 665	(4)	(4)	(4)	(4)	(4)	133.5	1.7
New York <sup>6</sup>	6,594	42,959	50.1	185.05	7.10	(4)	555.6	9.1
Special state fund <sup>8</sup> .....	...	...	.6	147.20	15.00	(4)	4.4	6.0
Private plans <sup>9</sup> .....	6,594	42,959	49.5	185.49	7.10	421.0	<sup>10</sup> 551.2	(4)
Puerto Rico .....	599	10,778	(4)	(4)	(4)	(4)	9.2	2.5
State-operated fund.....	178	5,339	1.3	89.00	8.46	12.3	6.1	2.3
Private plans .....	421	5,439	.6	91.00	7.99	.9	3.1	.2
Rhode Island (state-operated fund) .....	392	8,796	7.6	263.00	9.60	105.0	103.8	5.8
Railroad (publicly operated fund) .....	256	2,943	<sup>11</sup> 5.6	<sup>12</sup> 214.50	<sup>12</sup> 14.00	<sup>13</sup> 87.4	<sup>14</sup> 32.8	<sup>13</sup> 14.3

<sup>1</sup> Statutory programs providing short-term cash benefits to employees unable to work because of nonoccupational illness or injury.

<sup>2</sup> State cost of administering state program and of supervising private plans.

<sup>3</sup> Benefits and beneficiary data are for periods paid or terminated in 1998.

<sup>4</sup> Data not available.

<sup>5</sup> Includes data not shown separately for special fund for workers whose disability begins during unemployment. In 1998, the fund paid \$68,472 in benefits.

<sup>6</sup> State fiscal year data.

<sup>7</sup> Estimated data.

<sup>8</sup> For workers whose disability begins during unemployment.

<sup>9</sup> Includes State Insurance Fund of \$12.1 million.

<sup>10</sup> Includes medical, surgical, and hospital benefits amounting to \$69.3 million paid under approved plans.

<sup>11</sup> For 14-day registration period.

<sup>12</sup> For benefit year 1997–1998 (July 1, 1997–June 30, 1998).

<sup>13</sup> Single system of contributions and administrative operations for railroad unemployment insurance and temporary disability; collections amounted to \$87.4 million and administrative expenses to \$14.3 million for the system in 1998.

<sup>14</sup> Of this amount, \$29.3 million was for regular benefits and \$3.5 million for extended benefits.

## 9.D Black Lung Benefits

Table 9.D1.—Currently payable to miners, widows, and dependents, 1970–2000<sup>1</sup>

December	Number				Benefits (in thousands)	
	Total	Miners	Widows	Dependents <sup>2</sup>	Monthly amount	Annual amount
1970.....	111,976	43,921	24,889	43,166	\$12,500	\$111,000
1971.....	231,729	77,213	67,358	87,158	27,200	378,900
1972.....	298,963	101,802	88,067	109,094	37,800	554,400
1973.....	461,491	159,837	124,154	177,500	63,700	1,045,200
1974.....	487,216	169,097	134,700	183,419	71,500	951,300
1975.....	482,311	165,405	139,407	177,499	75,500	947,700
1976.....	469,655	158,087	142,495	169,073	77,400	963,300
1977.....	457,399	148,720	144,543	164,136	80,500	942,200
1978.....	439,970	138,648	145,829	155,493	82,300	965,100
1979.....	418,948	129,558	146,527	142,863	86,500	983,100
1980.....	399,477	120,235	146,603	132,639	91,400	1,032,000
1981.....	376,505	111,249	146,173	119,083	91,700	1,081,300
1982.....	354,569	102,234	144,863	107,472	90,800	1,076,000
1983.....	333,358	93,694	142,967	96,697	86,300	1,055,800
1984.....	313,822	85,658	140,995	87,169	85,300	1,038,000
1985.....	294,846	77,836	138,328	78,682	83,700	1,025,000
1986.....	275,783	70,253	135,033	70,497	78,900	971,000
1987.....	258,988	63,573	131,561	63,854	76,800	940,000
1988.....	241,626	56,977	127,322	57,327	73,500	904,000
1989.....	225,764	51,048	123,220	51,496	72,000	882,000
1990.....	210,678	45,643	118,705	46,330	70,000	863,400
1991.....	196,419	40,703	114,046	41,670	68,400	844,400
1992.....	182,396	35,971	109,091	37,334	66,500	822,500
1993.....	168,365	31,664	103,334	33,367	64,100	794,300
1994.....	155,172	27,828	97,414	29,930	60,600	751,900
1995.....	143,011	24,573	91,517	26,921	56,100	696,700
1996.....	131,143	21,477	85,559	24,107	52,600	654,600
1997.....	119,233	18,488	79,238	21,507	49,255	614,888
1998.....	109,271	15,964	73,420	19,887	46,204	576,389
1999.....	98,977	13,635	67,359	17,983	43,225	541,200
2000.....	89,355	11,587	61,542	16,226	40,625	509,290

<sup>1</sup> Benefits payable under Part B of the Black Lung program established by the Federal Coal Mine Health and Safety Act of 1969. Beginning Oct. 1, 1997, responsibility for maintenance and payment of Part B benefits was transferred from the Social Security Administration (SSA) to the Department of Labor (DOL); SSA, however, maintains responsibility for conducting formal hearings necessary to resolve contested issues with regard to Part B claims. Benefits under Part C (generally claims arising July 1, 1973 and later) are also administered by the DOL but are not included here.

<sup>2</sup> Includes wives of living miners, divorced wives, children, and dependent brothers and sisters of miners.

Table 9.D2.—Currently payable to miners, widows, and dependents, by state, December 2000<sup>1</sup>

State	Number				Monthly amount (in thousands)		
	Total	Miners	Widows	Dependents <sup>2</sup>	Total	Miners <sup>3</sup>	Widows <sup>4</sup>
Total .....	89,355	11,587	61,542	16,226	\$40,625	\$7,554	\$33,070
Alabama.....	3,743	313	2,728	702	1,678	203	1,475
Alaska.....	14	...	13	1	6	...	6
Arizona.....	260	24	209	27	122	14	107
Arkansas.....	513	67	379	67	236	43	193
California.....	637	56	516	65	300	34	266
Colorado.....	662	71	509	82	307	46	261
Connecticut.....	177	11	147	19	83	7	76
Delaware.....	115	10	92	13	54	6	48
District of Columbia.....	30	2	25	3	14	1	12
Florida.....	2,113	253	1,489	371	954	169	785
Georgia.....	341	33	256	52	156	20	136
Hawaii.....	4	...	3	1	2	...	1
Idaho.....	27	2	19	6	13	1	11
Illinois.....	3,353	289	2,654	410	1,569	184	1,384
Indiana.....	1,792	179	1,323	290	830	114	715
Iowa.....	374	42	286	46	176	25	150
Kansas.....	173	9	150	14	82	5	77
Kentucky.....	12,488	2,199	7,273	3,016	5,497	1,476	4,021
Louisiana.....	33	4	23	6	15	2	12
Maine.....	3	...	3	...	1	...	1
Maryland.....	799	72	596	131	371	45	325
Massachusetts.....	47	2	38	7	22	1	20
Michigan.....	988	72	779	137	465	46	418
Minnesota.....	24	...	21	3	11	...	11
Mississippi.....	52	7	37	8	23	4	19
Missouri.....	280	11	235	34	132	7	125
Montana.....	113	11	90	12	53	6	46
Nebraska.....	11	...	10	1	5	...	5
Nevada.....	75	4	63	8	35	2	32
New Hampshire.....	3	...	3	...	1	...	1
New Jersey.....	666	40	559	67	314	24	289
New Mexico.....	193	18	147	28	90	12	77
New York.....	592	40	475	77	279	25	254
North Carolina.....	750	80	535	135	338	51	286
North Dakota.....	7	...	7	...	3	...	3
Ohio.....	5,496	536	4,044	916	2,544	349	2,195
Oklahoma.....	417	55	307	55	192	34	158
Oregon.....	69	8	50	11	32	4	27
Pennsylvania.....	22,374	2,650	16,664	3,060	10,405	1,654	8,751
Rhode Island.....	8	...	7	1	3	...	3
South Carolina.....	253	26	176	51	112	16	96
South Dakota.....	2	...	2	...	(5)	...	(5)
Tennessee.....	3,515	426	2,377	712	1,572	278	1,294
Texas.....	250	19	190	41	117	11	105
Utah.....	438	58	320	60	202	37	164
Vermont.....	7	...	7	...	3	...	3
Virginia.....	6,871	1,142	4,226	1,503	3,062	763	2,299
Washington.....	157	15	126	16	73	9	63
West Virginia.....	17,692	2,709	11,065	3,918	7,876	1,792	6,084
Wisconsin.....	42	2	37	3	20	(5)	19
Wyoming.....	169	13	136	20	80	8	72
Other.....	143	7	116	20	68	5	63

<sup>1</sup>Benefits payable under Part B of the Black Lung program established by the Federal Coal Mine Health and Safety Act of 1969. Beginning Oct. 1, 1997, responsibility for maintenance and payment of Part B benefits was transferred from the Social Security Administration (SSA) to the Department of Labor (DOL); SSA, however, maintains responsibility for conducting formal hearings necessary to resolve contested issues with regard to Part B claims. Benefits under Part C (generally claims arising July 1, 1973 and later) are also administered by the DOL but are not included here.

<sup>2</sup>Includes wives of living miners, divorced wives, children, and dependent brothers and sisters of miners.

<sup>3</sup>Includes benefits for wives and children.

<sup>4</sup>Includes benefits for surviving children, brothers, sisters, and divorced wives. Prior to December 1997, monthly payments for surviving children were included with payments to miners.

<sup>5</sup>Less than \$500.

## 9.D Black Lung Benefits

Table 9.D3.—Currently payable to miners and widows, by age, December 2000<sup>1</sup>

Age	Total		Miners		Widows	
	Number	Average monthly benefit <sup>2</sup>	Number	Average monthly benefit <sup>2</sup>	Number	Average monthly benefit <sup>3</sup>
Total.....	4 73,129	\$519.79	4 11,587	\$651.98	4 61,542	\$494.91
Under 45 .....	79	573.70	7	626.43	72	568.57
45-54 .....	315	548.05	9	663.00	306	544.67
55-64 .....	1,770	546.26	291	717.09	1,479	512.65
65-74 .....	9,683	542.80	2,032	700.38	7,651	500.94
75-84 .....	30,552	521.64	4,996	660.41	25,556	494.51
85 or older.....	30,588	508.81	4,252	614.49	26,336	491.75

<sup>1</sup>Benefits payable under Part B of the Black Lung program established by the Federal Coal Mine Health and Safety Act of 1969. Beginning Oct. 1, 1997, responsibility for maintenance and payment of Part B benefits was transferred from the Social Security Administration (SSA) to the Department of Labor (DOL); SSA, however, maintains responsibility for conducting formal hearings necessary to resolve contested issues with regard to Part B claims. Benefits under Part C (generally claims arising July 1, 1973 and later) are also administered by the DOL but are not included here.

<sup>2</sup>Includes benefits for wives and children.

<sup>3</sup>Includes benefits for surviving children, brothers, sisters, and divorced wives. Prior to December 1997, monthly payments for surviving children were included with payments to miners.

<sup>4</sup>Includes miners and widows for whom age is not available.



Table 9.F1.—Number of payments, by type of payment and age, 1940–2000

[In thousands]

Period	Disability compensation or pension										
	Total <sup>1</sup>	Service-connected							Non-service-connected		
		All ages	Under age 65			Aged 65 or older			All ages	Under age 65	Aged 65 or older
			Total	Disability rating <sup>2</sup>		Total	Disability rating <sup>2</sup>				
		Less than 70 percent	70–100 percent		Less than 70 percent	70–100 percent					
<b>As of June 30:</b>											
1940.....	610	385	...	...	...	...	...	...	189	...	...
1945.....	1,144	912	...	...	...	...	...	...	159	...	...
1950.....	2,368	1,990	...	...	...	...	...	...	290	...	...
1955.....	2,669	2,076	...	...	...	...	...	...	531	...	...
1956.....	2,739	2,083	2,026	1,841	185	57	43	14	597	319	278
<b>As of June 20:</b>											
1957.....	2,797	2,074	2,004	1,825	179	70	53	17	670	304	366
1958.....	2,850	2,064	1,980	1,807	173	84	65	19	741	279	462
1959.....	2,934	2,053	1,952	1,781	171	101	78	23	841	257	584
1960.....	3,009	2,027	1,908	1,746	162	119	93	26	947	219	728
1961.....	3,107	2,000	1,868	1,711	158	131	104	27	1,077	182	895
1962.....	3,150	1,987	1,849	1,693	156	138	109	29	1,138	166	972
1963.....	3,181	1,989	1,844	1,686	158	145	115	30	1,170	165	1,005
1964.....	3,197	1,993	1,846	1,684	162	147	117	30	1,186	176	1,010
1965.....	3,217	1,992	1,846	1,679	167	146	117	29	1,210	197	1,013
1966.....	3,201	1,993	1,850	1,677	173	143	115	28	1,196	221	975
1967.....	3,182	1,999	1,858	1,683	175	141	114	27	1,173	243	930
1968.....	3,164	2,011	1,873	1,696	177	138	112	26	1,145	265	880
1969.....	3,160	2,039	1,904	1,712	192	135	110	25	1,114	286	828
1970.....	3,181	2,091	1,950	1,754	196	141	116	25	1,086	310	776
1971.....	3,222	2,146	1,995	1,780	215	151	128	23	1,073	335	738
1972.....	3,269	2,183	2,022	1,804	218	161	135	26	1,086	381	705
1973.....	3,257	2,204	2,028	1,806	222	176	150	26	1,053	402	651
1974.....	3,241	2,211	2,018	1,796	222	193	165	28	1,030	410	620
1975.....	3,227	2,220	2,006	1,784	222	214	185	29	1,006	430	576
1976.....	3,236	2,232	1,996	1,767	229	236	209	27	1,003	456	547
<b>As of September 30:</b>											
1977.....	3,280	2,248	1,989	1,759	230	258	226	32	1,032	505	527
1978.....	3,284	2,259	1,971	1,741	230	288	254	34	1,025	516	509
1979.....	3,241	2,267	1,944	1,717	227	323	285	38	974	500	474
1980.....	3,196	2,274	1,912	1,689	223	362	320	42	922	467	455
1981.....	3,154	2,279	1,873	1,656	217	406	359	47	875	438	437
1982.....	3,096	2,274	1,818	1,606	210	456	404	52	824	406	418
1983.....	3,044	2,263	1,744	1,544	200	519	461	58	781	373	408
1984.....	2,980	2,251	1,666	1,476	190	585	520	65	729	339	390
1985.....	2,931	2,240	1,589	1,408	181	651	579	72	690	306	384
1986.....	2,883	2,225	1,505	1,335	169	720	641	79	658	274	384
1987.....	2,844	2,212	1,428	1,268	160	784	698	86	631	244	387
1988.....	2,804	2,199	1,361	1,209	153	838	746	92	606	219	387
1989.....	2,776	2,192	1,302	1,156	146	890	792	98	584	196	388
1990.....	2,746	2,184	1,253	1,113	140	931	828	102	562	175	387
1991.....	2,709	2,179	1,238	1,098	140	941	838	103	530	156	375
1992.....	2,674	2,181	1,245	1,104	141	936	833	103	493	138	354
1993.....	2,660	2,198	1,265	1,122	143	932	828	104	462	128	335
1994.....	2,659	2,218	1,290	1,144	146	928	824	104	441	122	319
1995.....	2,669	2,236	1,310	1,158	152	926	819	107	433	120	313
1996.....	2,671	2,253	1,330	1,171	158	923	814	109	418	116	302
1997.....	2,667	2,263	1,346	1,178	168	917	805	112	404	112	292
1998.....	2,668	2,277	1,372	1,191	180	905	790	115	391	110	281
1999.....	2,673	2,294	1,404	1,209	195	890	771	119	379	113	266
2000.....	2,672	2,308	1,435	1,224	211	874	751	123	364	115	249

<sup>1</sup> Persons receiving payments under special acts and as retired emergency and reserve officers included in total but excluded from distribution.

<sup>2</sup> Disability rated by the Department of Veterans Affairs according to average impairment of earning capacity, graduated in intervals from 10–100 percent.

Source: Department of Veterans Affairs published and unpublished data.

## 9.G TANF/AFDC & Emergency Assistance

Table 9.G1.—Average monthly number of recipients, total amount of cash payments, and average monthly payment, 1936–1999

[Includes nonmedical vendor payments. Includes Alaska and Hawaii, beginning in 1943; Puerto Rico and the Virgin Islands, beginning in October 1950, and Guam, beginning in July 1959]

Year	Temporary Assistance for Needy Families/ Aid to Families with Dependent Children <sup>1</sup>						Emergency Assistance <sup>2</sup>		
	Average monthly number (in thousands)			Amount in payments <sup>3</sup>			Average monthly number of families (in thousands)	Total assistance payments during year (in thousands)	Average monthly payment per family
	Families	Recipients		Total (in thousands)	Monthly average per—				
		Total	Children		Family	Recipient			
1936.....	147	534	361	\$49,678	\$28.15	\$7.75	...	...	...
1940.....	349	1,182	840	133,770	31.98	9.43	...	...	...
1945.....	259	907	656	149,667	48.18	13.75	...	...	...
1950.....	644	2,205	1,637	551,653	71.33	17.64	...	...	...
1955.....	612	2,214	1,673	617,841	84.17	23.26	...	...	...
1960.....	787	3,005	2,314	1,000,784	105.75	27.75	...	...	...
1961.....	869	3,354	2,587	1,156,769	110.97	28.74	...	...	...
1962.....	931	3,676	2,818	1,298,774	116.30	29.44	...	...	...
1963.....	947	3,876	2,909	1,365,851	120.19	29.36	...	...	...
1964.....	992	4,118	3,091	1,510,352	126.88	30.57	...	...	...
1965.....	1,039	4,329	3,256	1,660,186	133.20	31.96	...	...	...
1966.....	1,088	4,513	3,411	1,863,925	142.83	34.42	...	...	...
1967.....	1,217	5,014	3,771	2,266,400	155.19	37.67	...	...	...
1968.....	1,410	5,705	4,275	2,849,298	168.41	41.62	...	...	...
1969.....	1,698	6,706	4,985	3,563,427	174.89	44.28	7.5	\$6,699	\$117.23
1970.....	2,208	8,466	6,214	4,852,964	183.13	47.77	7.5	11,396	126.14
1971.....	2,762	10,241	7,434	6,203,528	187.16	50.48	11.1	19,843	148.54
1972.....	3,049	10,947	7,905	6,909,260	188.87	52.60	19.9	44,180	184.91
1973.....	3,148	10,949	7,902	7,212,035	190.91	54.89	18.8	39,265	174.05
1974.....	3,230	10,864	7,822	7,916,563	204.27	60.72	31.3	64,031	170.38
1975.....	3,498	11,346	8,095	9,210,995	219.44	67.65	38.3	77,516	168.85
1976.....	3,579	11,304	8,001	10,140,543	236.10	74.75	27.5	55,673	168.43
1977.....	3,588	11,050	7,773	10,603,820	246.27	79.97	32.8	66,132	168.05
1978.....	3,522	10,570	7,402	10,730,415	253.89	84.60	34.5	80,919	195.24
1979.....	3,509	10,312	7,179	11,068,864	262.86	89.45	35.7	84,043	195.92
1980.....	3,712	10,774	7,419	12,475,245	280.03	96.49	48.6	113,238	194.29
1981.....	3,835	10,079	7,527	12,981,115	282.04	97.64	49.1	123,467	209.51
1982.....	3,542	10,258	6,903	12,877,906	303.02	103.60	27.5	102,344	<sup>4</sup> 278.54
1983.....	3,686	10,761	7,098	13,837,228	312.82	107.16	30.0	125,246	<sup>4</sup> 283.15
1984.....	3,714	10,831	7,144	14,503,710	325.44	111.60	32.1	141,137	<sup>4</sup> 276.97
1985.....	3,701	10,855	7,198	15,195,835	342.15	116.65	32.6	157,304	<sup>4</sup> 312.98
1986.....	3,763	11,038	7,334	16,033,074	355.04	121.05	34.8	178,824	<sup>4</sup> 362.45
1987.....	3,776	11,027	7,366	16,372,535	361.37	123.73	42.4	213,903	<sup>4</sup> 358.29
1988.....	3,749	10,915	7,329	16,826,794	374.07	128.47	48.8	278,906	<sup>4</sup> 420.89
1989.....	3,799	10,993	7,420	17,465,943	383.14	132.40	48.7	296,841	<sup>4</sup> 461.45
1990.....	4,057	11,695	7,917	19,066,541	391.67	135.86	56.0	348,986	<sup>4</sup> 476.50
1991.....	4,467	12,930	8,715	20,930,600	390.44	134.89	59.7	302,894	<sup>4</sup> 422.07
1992.....	4,829	13,773	9,303	21,655,881	373.71	131.03	52.7	272,853	<sup>4</sup> 431.41
1993.....	5,012	14,205	9,574	22,688,016	377.24	133.10	56.8	387,113	<sup>4</sup> 568.17
1994.....	5,035	14,164	9,570	22,827,399	377.78	134.30	60.5	802,258	<sup>4</sup> 1,105.95
1995.....	4,791	13,418	9,135	21,608,686	375.31	134.21	84.1	3,447,361	<sup>4</sup> 3,415.93
1996.....	4,434	12,321	8,469	20,614,437	386.68	139.44	69.8	2,708,401	<sup>4</sup> 3,235.10
1997.....	3,740	10,376	7,042	22,031,399	490.01	176.95	81.8	403,138	<sup>4</sup> 410.74
1998.....	3,050	8,347	6,034	19,328,429	528.04	192.96	...	...	...
1999.....	2,555	6,835	5,130	22,759,897	742.45	277.48	...	...	...

<sup>1</sup> Thirty-four states had converted to TANF as of Jan. 1, 1997; eight phased in over the next 5 months; the remaining 12 waited until July 1, 1997.

<sup>2</sup> Reporting initiated July 1969. Number of states with program: 1969-70, 23; 1971, 24; 1972, 27; 1973-75, 29; 1976-78, 26; 1979, 24; 1980-84, 27; 1985-86, 28; 1987, 29; 1988, 30; 1989, 31; 1990, 33; 1991, 34; 1992, 34; 1993, 35; 1994, 49; 1995, 50; 1996, 51; and 1997, 34. Program ended June 30, 1997.

<sup>3</sup> TANF expenditures include services as well as cash payments.

<sup>4</sup> Excludes family count and expenditures for states providing only partial data.

CONTACT: Evelyn Mills (202) 401-4055 for further information.

Table 9.G2.—Average monthly number of families and recipients of cash payments and total amount of payments, by state, 1999

State	TANF effective date <sup>1</sup>	Temporary Assistance for Needy Families					
		Average monthly number of—			Amount of payments		
		Families	Recipients		Total (in thousands)	Monthly average per—	
			Total	Children		Family	Recipient
Total .....		2,554,603	6,835,260	5,130,247	\$22,759,897	\$742.45	\$277.48
Alabama.....	11/15/96	19,817	49,470	38,257	91,038	\$382.83	\$153.36
Alaska.....	7/1/97	8,128	25,221	16,640	85,343	874.96	281.99
Arizona.....	10/1/96	33,895	89,097	49,030	240,416	591.08	224.86
Arkansas.....	7/1/97	11,979	29,023	21,913	84,210	585.80	241.79
California.....	11/26/96	591,812	1,661,769	1,294,329	6,615,099	931.48	331.73
Colorado.....	7/1/97	13,263	35,207	28,165	123,404	775.37	292.09
Connecticut.....	10/1/96	32,028	77,955	57,404	363,044	944.60	388.09
Delaware.....	3/10/97	6,385	16,613	12,448	62,372	814.09	312.87
District of Columbia.....	3/1/97	18,744	50,153	39,029	121,847	541.70	202.46
Florida.....	10/1/96	77,274	184,486	150,196	430,761	464.54	194.58
Georgia.....	1/1/97	59,123	150,324	115,378	343,899	484.73	190.64
Guam.....	7/1/97	1,952	6,648	4,958	12,165	519.28	152.49
Hawaii.....	7/1/97	15,610	45,606	32,508	118,227	631.16	216.03
Idaho.....	7/1/97	1,303	2,499	2,055	33,248	2,126.40	1,108.87
Illinois.....	7/1/97	112,469	335,395	261,860	785,688	582.15	195.21
Indiana.....	10/1/96	36,910	107,688	76,201	199,491	450.40	154.37
Iowa.....	1/1/97	21,434	57,618	39,305	163,020	633.80	235.78
Kansas.....	10/1/96	12,775	32,356	23,709	187,284	1,221.71	482.35
Kentucky.....	10/18/96	41,200	95,488	70,527	215,659	436.20	188.21
Louisiana.....	1/1/97	35,636	101,299	95,018	121,722	284.64	100.13
Maine.....	11/1/96	12,748	33,436	23,303	89,180	582.98	222.27
Maryland.....	12/9/96	32,299	81,736	62,219	280,507	723.72	285.99
Massachusetts.....	9/30/96	51,169	121,784	92,024	628,883	1,024.20	430.33
Michigan.....	9/30/96	89,102	243,818	191,119	1,083,499	1,013.35	370.32
Minnesota.....	7/1/97	41,441	120,788	87,209	363,334	730.62	250.67
Mississippi.....	10/1/96	15,770	36,191	31,809	84,483	446.42	194.53
Missouri.....	12/1/96	49,130	128,485	99,089	295,717	501.59	191.80
Montana.....	12/16/96	4,620	13,618	9,057	38,357	691.84	234.72
Nebraska.....	12/1/96	10,797	30,900	21,789	81,375	628.06	219.46
Nevada.....	12/3/96	7,318	18,359	14,485	58,689	668.31	266.40
New Hampshire.....	10/1/96	6,255	15,274	10,509	57,819	770.31	315.47
New Jersey.....	2/1/97	59,256	155,067	119,490	423,058	594.96	227.35
New Mexico.....	7/1/97	25,325	79,183	53,311	116,092	382.01	122.18
New York.....	12/2/96	309,800	793,366	556,264	3,367,194	905.74	353.68
North Carolina.....	1/1/97	55,034	123,748	96,815	394,949	598.04	265.96
North Dakota.....	7/1/97	3,061	8,409	6,135	31,847	867.04	315.60
Ohio.....	10/1/96	104,215	262,806	203,846	792,541	633.74	251.31
Oklahoma.....	10/1/96	18,194	49,152	34,922	156,684	717.66	265.65
Oregon.....	10/1/96	16,922	43,891	30,530	264,048	1,300.29	501.33
Pennsylvania.....	3/3/97	100,622	280,084	204,790	1,285,821	1,064.89	382.57
Puerto Rico.....	7/1/97	34,946	102,806	75,736	42,390	101.08	34.36
Rhode Island.....	5/1/97	17,613	48,891	29,557	154,027	728.74	262.54
South Carolina.....	10/12/96	17,440	41,029	32,837	118,565	566.54	240.82
South Dakota.....	12/1/96	3,070	7,667	6,094	21,601	586.38	234.77
Tennessee.....	10/1/96	57,287	153,286	110,581	242,553	352.84	131.86
Texas.....	11/5/96	115,313	310,698	228,161	599,296	433.10	160.74
Utah.....	10/1/96	9,430	27,435	18,112	78,034	689.61	237.03
Vermont.....	9/20/96	6,492	17,585	11,500	62,417	801.26	295.78
Virgin Islands.....	7/1/97	992	3,529	2,653	3,040	255.26	71.77
Virginia.....	2/1/97	35,977	85,933	62,861	243,055	562.99	235.70
Washington.....	1/10/97	60,805	166,085	117,607	503,048	689.43	252.41
West Virginia.....	1/11/97	11,322	30,961	20,780	69,790	513.69	187.84
Wisconsin.....	9/30/96	18,347	43,777	34,880	316,422	1,437.20	602.34
Wyoming.....	1/1/97	756	1,576	1,247	13,645	1,503.72	721.45

<sup>1</sup> Transition from AFDC to TANF reporting systems occurred July 1, 1997 or 6 months after TANF effective date, whichever was later.

CONTACT: Evelyn Mills (202) 401-4055 for further information.

## 9.H Food Stamps

Table 9.H1.—Number of persons participating, value of benefits, and average benefit per person, fiscal years 1962–2000<sup>1</sup>

Fiscal year	Persons participating, average during year (in thousands)	Annual benefit (in thousands)	Annual average monthly benefit <sup>2</sup> per person
1962.....	143	\$13,153	\$7.66
1963.....	226	18,639	6.87
1964.....	367	28,643	6.50
1965.....	424	32,494	6.39
1966.....	864	64,781	6.25
1967.....	1,447	105,455	6.07
1968.....	2,211	172,982	6.52
1969.....	2,878	228,587	6.62
1970.....	4,340	550,806	10.58
1971.....	9,368	1,522,904	13.55
1972.....	11,103	1,794,875	13.47
1973.....	12,190	2,102,133	14.37
1974.....	12,896	2,725,988	17.62
1975.....	17,063	4,386,144	21.42
1976.....	18,557	5,310,133	23.85
1977.....	17,058	5,057,700	24.71
1978.....	16,044	5,165,209	26.83
1979.....	17,710	6,484,538	30.51
1980.....	21,077	8,685,521	34.34
1981.....	22,430	10,615,964	39.44
1982 <sup>3</sup> .....	21,716	10,205,799	39.18
1983.....	21,630	11,153,867	42.98
1984.....	20,858	10,696,100	42.74
1985.....	19,910	10,744,200	44.99
1986.....	19,428	10,604,950	45.49
1987.....	19,113	10,500,344	45.78
1988.....	18,644	11,149,051	50.00
1989.....	18,766	10,676,436	51.85
1990.....	20,038	14,184,028	59.01
1991.....	22,629	17,307,235	63.89
1992.....	25,403	20,899,531	68.57
1993 <sup>4</sup> .....	26,982	22,006,031	67.96
1994 <sup>4</sup> .....	27,468	22,748,559	69.01
1995 <sup>4</sup> .....	26,619	22,765,478	71.27
1996.....	25,533	22,440,298	73.23
1997.....	22,851	19,555,263	71.31
1998.....	19,787	16,879,929	71.09
1999.....	18,123	15,761,615	72.23
2000.....	17,155	14,985,093	72.79

<sup>1</sup> Between 1974 and 1979, Supplemental Security Income (SSI) recipients were made ineligible for food stamps in Massachusetts, Wisconsin, California and selected counties in New York and Virginia because those areas supplemented SSI payments in amounts that included the value of food stamps. As of 1983 and 1992, SSI recipients were returned to the Food Stamp program in Massachusetts and Wisconsin, respectively, when these states chose to stop including a value for food stamps in the SSI supplement.

<sup>2</sup> That portion of the food stamp allotment, before the elimination of the purchase requirement, represented the government's share of total food stamps received. Since January 1979, only the bonus portion of the total food stamp allotment is received by participants.

<sup>3</sup> Excludes participants and benefits under the Puerto Rico Nutrition Assistance Program after July 1, 1982.

<sup>4</sup> Revised data.

Source: U.S. Department of Agriculture, Food and Nutrition Service.

CONTACT: Jenny Genser (703) 305-2152 for further information.

9.J Low-Income Home Energy Assistance Program

Table 9.J1.—Number of households receiving home energy assistance, by type of assistance and state, fiscal years 1997–1999

State	Heating	Cooling	Energy crisis intervention		Low-cost residential weatherization/energy-related home repair
			Winter	Summer	
Number of households assisted: 1997 <sup>1</sup>					
Total .....	<sup>2</sup> 4,069,409	<sup>3</sup> 129,184	769,154	19,121	82,931
Alabama .....	44,261	...	8,784	13,180	445
Alaska .....	11,947	...	419	...	1,310
Arizona .....	<sup>2</sup> 17,713	(3)	3,141	...	560
Arkansas .....	42,964	...	12,692	...	556
California .....	<sup>2</sup> 171,574	(3)	18,949	...	16,373
Colorado .....	59,566	...	1,091	...	1,999
Connecticut .....	59,586	...	15,356	...	...
Delaware .....	10,958	...	534	...	263
District of Columbia .....	11,147	...	2,664	...	285
Florida .....	<sup>2</sup> 69,999	(3)	21,826	...	1,116
Georgia .....	80,060	...	...	...	786
Hawaii .....	<sup>2</sup> 5,703	(3)	...	1,655	...
Idaho .....	21,186	...	2,148	...	1,527
Illinois .....	192,337	...	10,509	...	524
Indiana .....	104,945	5,469	23,122	...	1,617
Iowa .....	67,993	...	5,194	...	1,029
Kansas .....	21,015	...	6,481	...	401
Kentucky .....	98,544	...	58,597	...	3,087
Louisiana .....	15,016	28,291	103	...	1,204
Maine .....	43,561	...	786	...	1,006
Maryland .....	73,404	...	3,299	...	...
Massachusetts .....	119,017	...	8,478	...	4,861
Michigan .....	305,634	...	73,968	...	4,090
Minnesota .....	88,650	...	17,909	...	562
Mississippi .....	27,262	10,220	1,376	580	...
Missouri .....	105,010	...	28,261	...	...
Montana .....	17,025	...	187	...	480
Nebraska .....	27,071	5,149	30,902	360	693
Nevada .....	8,076	4,316	...	124	...
New Hampshire .....	19,074	...	2,505	...	354
New Jersey .....	139,567	15,320	7,046	...	1,298
New Mexico .....	65,564	...	3,577	547	151
New York .....	659,270	...	90,026	...	2,818
North Carolina .....	163,161	...	44,325	...	1,747
North Dakota .....	13,303	105	1,213	...	1,321
Ohio .....	226,464	...	119,843	364	7,498
Oklahoma .....	62,322	...	5,397	...	305
Oregon .....	45,469	...	213	...	1,960
Pennsylvania .....	234,577	...	63,259	...	5,059
Rhode Island .....	17,602	...	2,535	...	409
South Carolina .....	50,247	...	2,818	1,613	675
South Dakota .....	14,874	...	707	...	760
Tennessee .....	62,709	7,056	20,142	...	1,707
Texas .....	29,722	48,177	6,350	...	1,051
Utah .....	25,573	5,081	584	...	646
Vermont .....	13,691	...	5,683	698	1,146
Virginia .....	95,970	...	1,769	...	768
Washington .....	55,157	...	920	...	2,902
West Virginia .....	42,895	...	13,141	...	555
Wisconsin .....	103,534	...	19,148	...	4,851
Wyoming .....	7,440	...	1,177	...	176

See footnotes at end of table.

## 9.J Low-Income Home Energy Assistance Program

Table 9.J1.—Number of households receiving home energy assistance, by type of assistance and state, fiscal years 1997–1999—*Continued*

State	Heating	Cooling	Energy crisis intervention		Low-cost residential weatherization/energy-related home repair
			Winter	Summer	
Number of households assisted: 1998 <sup>1</sup>					
Total .....	<sup>2</sup> 3,641,836	<sup>3</sup> 316,764	704,640	154,708	85,708
Alabama .....	36,389	...	6,705	44,743	570
Alaska .....	10,729	...	573	...	1,036
Arizona .....	<sup>2</sup> 17,316	(3)	3,041	...	495
Arkansas .....	39,030	19,850	16,640	5,436	607
California .....	<sup>2</sup> 121,161	(3)	22,916	...	16,983
Colorado .....	57,802	...	1,245	...	1,569
Connecticut .....	56,602	...	10,945	...	...
Delaware .....	10,517	...	777	...	246
District of Columbia .....	10,842	...	2,502	...	350
Florida .....	33,770	48,054	14,421	51,368	783
Georgia .....	64,189	48,334	...	...	875
Hawaii .....	<sup>2</sup> 5,298	(3)	...	1,550	...
Idaho .....	21,803	...	2,739	...	1,178
Illinois .....	152,497	...	8,544	...	2,841
Indiana .....	105,380	22,269	24,574	...	1,668
Iowa .....	64,039	...	4,894	...	970
Kansas .....	18,721	...	5,181	...	385
Kentucky .....	92,642	...	48,778	...	1,874
Louisiana .....	14,687	29,375	...	...	383
Maine .....	36,604	...	852	40,273	251
Maryland .....	68,733	...	16,554	2,278	42
Massachusetts .....	112,593	...	8,259	...	6,800
Michigan .....	299,787	...	49,469	...	3,133
Minnesota .....	81,486	...	10,317	...	466
Mississippi .....	21,265	18,914	2,370	5,873	...
Missouri .....	93,143	...	26,917	...	...
Montana .....	15,211	...	189	...	301
Nebraska .....	23,064	5,333	10,947	...	519
Nevada .....	8,257	4,343	...	...	...
New Hampshire .....	17,598	...	2,606	...	219
New Jersey .....	120,656	19,441	7,726	...	964
New Mexico .....	11,543	3,372	7,220	1,275	93
New York .....	563,883	...	9,580	...	9,590
North Carolina .....	216,539	...	84,719	...	2,301
North Dakota .....	11,007	275	1,004	...	1,093
Ohio .....	207,951	...	108,942	362	6,022
Oklahoma .....	56,841	37,383	6,087	...	291
Oregon .....	42,781	...	117	...	1,960
Pennsylvania .....	231,740	...	65,324	...	4,150
Rhode Island .....	16,288	...	2,351	127	456
South Carolina .....	48,909	...	1,839	1,332	675
South Dakota .....	13,134	...	469	...	702
Tennessee .....	50,746	28,671	13,941	...	2,172
Texas .....	19,034	31,150	53,464	...	1,946
Utah .....	26,037	...	662	...	782
Vermont .....	14,140	...	4,600	91	1,192
Virginia .....	91,275	...	3,320	...	736
Washington .....	46,214	...	904	...	3,257
West Virginia .....	43,131	...	11,737	...	516
Wisconsin .....	92,271	...	17,074	...	2,071
Wyoming .....	6,561	...	605	...	195

See footnotes at end of table.

9.J Low-Income Home Energy Assistance Program

Table 9.J1.—Number of households receiving home energy assistance, by type of assistance and state, fiscal years 1997–1999—Continued

State	Heating	Cooling	Energy crisis intervention		Low-cost residential weatherization/energy-related home repair
			Winter	Summer	
Number of households assisted: 1999 <sup>1</sup>					
Total .....	<sup>2</sup> 3,338,720	<sup>3</sup> 532,619	757,410	315,470	84,106
Alabama .....	43,785	...	5,980	23,378	407
Alaska .....	8,226	...	343	...	985
Arizona .....	<sup>2</sup> 16,484	(3)	2,711	...	473
Arkansas .....	35,600	...	16,338	5,329	395
California .....	<sup>2</sup> 06,338	(3)	27,363	...	15,377
Colorado .....	48,656	...	979	...	1,536
Connecticut .....	52,587	...	7,375	32,919	...
Delaware .....	9,716	2,620	676	...	181
District of Columbia .....	14,046	...	3,710	...	119
Florida .....	34,701	36,425	12,617	63,638	1,346
Georgia .....	62,881	...	...	...	1,457
Hawaii .....	<sup>2</sup> 5,509	(3)	...	1,442	...
Idaho .....	21,229	...	1,691	...	1,004
Illinois .....	84,334	27,417	6,358	...	1,987
Indiana .....	84,469	31,226	12,394	...	1,487
Iowa .....	60,159	60,159	1,718	568	2,058
Kansas .....	20,500	...	4,699	...	448
Kentucky .....	84,469	44,127	51,804	...	802
Louisiana .....	3,457	17,285	...	...	321
Maine .....	35,696	31,816	814	...	326
Maryland .....	64,773	64,773	5,319	2,415	...
Massachusetts .....	105,665	95,056	7,453	...	6,763
Michigan .....	289,878	...	34,331	...	1,212
Minnesota .....	89,924	...	19,479	...	498
Mississippi .....	21,855	15,985	2,714	580	...
Missouri .....	88,498	...	43,830	...	...
Montana .....	13,984	...	348	348	553
Nebraska .....	21,472	5,607	27,508	575	557
Nevada .....	8,001	4,363	...	9	...
New Hampshire .....	17,051	5,823	2,193	...	151
New Jersey .....	113,086	19,983	8,846	28,723	1,826
New Mexico .....	18,856	...	3,343	...	441
New York .....	547,246	...	90,712	...	8,579
North Carolina .....	117,052	...	65,156	...	1,993
North Dakota .....	10,983	3	955	...	471
Ohio .....	195,272	...	102,487	43,734	4,453
Oklahoma .....	57,316	...	10,745	...	338
Oregon .....	46,082	...	151	...	1,960
Pennsylvania .....	215,876	...	42,696	84,490	4,347
Rhode Island .....	15,886	...	2,220	13,626	195
South Carolina .....	52,222	...	2,690	2,488	1,181
South Dakota .....	12,038	...	398	...	664
Tennessee .....	45,390	16,003	12,953	...	2,380
Texas .....	18,176	28,895	65,609	...	3,867
Utah .....	17,363	...	391	...	675
Vermont .....	13,165	12,717	4,504	940	1,000
Virginia .....	82,988	7,533	4,063	...	1,700
Washington .....	50,507	...	1,417	...	3,257
West Virginia .....	39,216	...	13,156	...	974
Wisconsin .....	87,002	...	23,414	11,196	3,257
Wyoming .....	6,317	...	759	...	105

<sup>1</sup> An unduplicated total of households assisted cannot be derived from these data because the same households may be included under more than one type of assistance.

<sup>2</sup> Totals include households that received combined heating and cooling assistance in Arizona, California, and Florida; households that received energy assistance in Hawaii with no differentiation made between heating and cooling assistance.

<sup>3</sup> Excludes households that received combined heating and cooling assistance in Arizona, California, and Florida; households that received energy assistance in Hawaii with no differentiation made between heating and cooling assistance.

Source: Low-Income Home Energy Assistance Program, U.S. Administration for Children and Families' administrative data.

CONTACT: Leon Litow (202) 401-5304 for further information.

## 9.J Low-Income Home Energy Assistance Program

Table 9.J1.1—Number of households receiving home energy assistance, by type of assistance, fiscal years 1982–1999

Fiscal year	Number of households assisted <sup>1</sup>				
	Heating	Cooling	Energy crisis intervention		Low-cost residential weatherization/energy-related home repair
			Winter	Summer	
1982.....	5,990,176	1,075,061	707,123	...	430,830
1983.....	6,414,448	529,036	972,894	25,342	482,620
1984.....	6,443,637	537,598	963,743	28,841	180,748
1985.....	6,545,616	511,333	857,809	27,196	217,864
1986.....	6,359,924	535,553	951,945	114,194	191,316
1987.....	6,495,409	366,721	1,060,425	60,797	172,372
1988.....	5,827,481	309,044	981,775	57,750	156,770
1989.....	5,595,268	126,977	890,616	20,384	142,584
1990.....	5,459,631	358,823	1,058,067	37,340	148,104
1991.....	5,769,346	374,483	1,004,634	39,399	127,587
1992.....	5,906,292	384,468	950,275	25,570	106,066
1993.....	5,282,993	143,279	956,435	47,169	111,295
1994.....	5,663,040	145,684	1,127,832	24,532	126,086
1995.....	5,147,619	341,041	932,263	77,915	102,817
1996.....	4,069,409	129,184	769,154	29,121	82,931
1997.....	4,069,409	129,184	769,154	19,121	82,931
1998.....	3,641,836	316,764	704,640	154,708	85,708
1999.....	3,338,720	532,619	757,410	315,470	84,106

<sup>1</sup> An unduplicated total of households assisted cannot be derived from these data because the same households may be included under more than one type of assistance. Totals include households that received combined heating and cooling assistance in Arizona, California, and Florida; households that received energy assistance in Hawaii with no differentiation made between heating and cooling assistance.

Source: Low-Income Home Energy Assistance Program, U.S. Administration for Children and Families' administrative data.

CONTACT: Leon Litow (202) 401-5304 for further information.



9.J Low-Income Home Energy Assistance Program

Table 9.J2.—Federal net allocations and amounts carried over, by state, fiscal years 1997–1999

State	Amount of regular federal allocation	Amount of supplemental federal allocation	Carried over to following fiscal year
Low-income Home Energy Assistance Program funds: 1997 <sup>1</sup>			
Total <sup>1</sup> .....	\$964,896,037	\$211,876,438	\$59,564,206
Alabama .....	8,331,663	1,556,412	660,286
Alaska .....	3,914,822	746,010	383,745
Arizona .....	3,723,469	695,563	...
Arkansas .....	6,391,684	1,194,014	273,042
California .....	44,626,866	8,336,606	3,522,413
Colorado .....	15,668,348	2,926,963	584,120
Connecticut .....	20,439,912	3,818,327	...
Delaware .....	2,713,005	506,809	299,954
District of Columbia .....	3,174,352	592,992	343,965
Florida .....	13,249,033	2,475,017	1,437,613
Georgia .....	10,479,449	1,957,639	600,943
Hawaii .....	1,055,338	197,145	11,435
Idaho .....	6,011,493	1,122,987	...
Illinois .....	56,574,147	20,044,545	5,653,337
Indiana .....	25,608,520	4,783,860	...
Iowa .....	18,153,824	6,432,004	1,511,065
Kansas .....	8,323,163	1,554,827	1,515,281
Kentucky .....	13,330,055	2,490,153	3,980,489
Louisiana .....	8,563,712	1,599,765	...
Maine .....	12,757,817	2,383,256	532,308
Maryland .....	15,650,582	2,923,645	1,008,581
Massachusetts .....	40,876,832	7,636,095	1,996,277
Michigan .....	53,503,729	9,994,891	5,491,176
Minnesota .....	38,696,597	13,710,427	...
Mississippi .....	7,169,576	1,339,328	...
Missouri .....	22,597,923	8,006,574	1,540,026
Montana .....	6,083,254	2,155,332	241,329
Nebraska .....	8,977,762	3,180,873	...
Nevada .....	1,902,629	355,425	180,126
New Hampshire .....	7,738,998	1,445,702	274,933
New Jersey .....	37,861,945	7,072,891	4,032,007
New Mexico .....	4,691,554	876,412	227,865
New York .....	123,704,329	23,139,615	8,814,529
North Carolina .....	18,111,203	3,414,394	24,086
North Dakota .....	6,726,675	4,767,388	686,958
Ohio .....	50,048,288	9,349,391	1,651,195
Oklahoma .....	7,095,942	1,325,561	242,185
Oregon .....	12,034,631	2,248,147	...
Pennsylvania .....	66,571,289	12,436,010	7,136,263
Rhode Island .....	6,711,108	1,253,683	726,510
South Carolina .....	6,652,668	1,242,768	722,660
South Dakota .....	5,200,146	3,684,165	...
Tennessee .....	13,503,061	2,522,472	184,683
Texas .....	22,050,507	4,119,198	...
Utah .....	7,031,651	1,334,106	752,628
Vermont .....	5,800,654	1,083,605	583,098
Virginia .....	19,064,159	3,561,326	927,898
Washington .....	19,178,470	3,582,648	448,446
West Virginia .....	8,821,510	1,647,923	360,751
Wisconsin .....	34,832,494	6,506,968	...
Wyoming .....	2,915,199	544,581	...

See footnote at end of table.

## 9.J Low-Income Home Energy Assistance Program

Table 9.J2.—Federal net allocations and amounts carried over, by state, fiscal years 1997–1999—*Continued*

State	Amount of regular federal allocation	Amount of supplemental federal allocation	Carried over to following fiscal year
Low-income Home Energy Assistance Program funds: 1998 <sup>1</sup>			
Total <sup>1</sup> .....	\$964,167,635	\$150,896,688	\$55,654,317
Alabama.....	8,326,719	8,194,841	988,800
Alaska.....	3,813,633	1,700,000	423,726
Arizona.....	3,713,949	...	...
Arkansas.....	6,388,182	5,944,812	341,664
California.....	44,581,315	...	1,700,000
Colorado.....	15,659,762	...	2,695,194
Connecticut.....	20,428,712	...	...
Delaware.....	2,711,518	...	321,981
District of Columbia.....	3,172,613	...	392,858
Florida.....	13,241,770	25,937,306	435,322
Georgia.....	10,473,707	12,667,785	...
Hawaii.....	1,054,760	...	12,519
Idaho.....	6,008,175	...	...
Illinois.....	56,543,147	...	...
Indiana.....	25,594,484	...	...
Iowa.....	18,143,877	...	717,008
Kansas.....	8,319,289	...	1,699,809
Kentucky.....	13,322,751	...	2,403,559
Louisiana.....	8,559,019	9,633,559	...
Maine.....	12,750,827	...	95,180
Maryland.....	15,642,006	...	1,513,317
Massachusetts.....	40,846,928	...	4,374,615
Michigan.....	53,464,245	...	5,257,909
Minnesota.....	38,675,393	...	...
Mississippi.....	7,165,641	4,361,857	...
Missouri.....	22,585,540	...	1,991,334
Montana.....	6,079,920	...	423,792
Nebraska.....	8,972,843	...	650,237
Nevada.....	1,901,586	...	179,203
New Hampshire.....	7,734,757	...	...
New Jersey.....	37,841,198	...	4,558,787
New Mexico.....	4,688,953	...	...
New York.....	123,636,421	...	7,579,790
North Carolina.....	18,101,082	9,601,364	311,789
North Dakota.....	6,571,998	...	1,152,181
Ohio.....	50,020,864	...	853,369
Oklahoma.....	7,081,712	6,358,396	239,999
Oregon.....	12,027,977	...	...
Pennsylvania.....	66,534,811	...	7,897,082
Rhode Island.....	6,707,420	...	796,479
South Carolina.....	6,649,023	7,103,592	...
South Dakota.....	5,197,282	...	851,852
Tennessee.....	13,495,662	8,344,732	518,729
Texas.....	22,038,424	51,048,444	...
Utah.....	7,137,697	...	836,576
Vermont.....	5,797,476	...	679,969
Virginia.....	19,053,713	...	1,299,685
Washington.....	19,165,169	...	413,160
West Virginia.....	8,816,676	...	1,046,843
Wisconsin.....	34,813,407	...	...
Wyoming.....	2,913,602	...	...

See footnote at end of table.

## 9.J Low-Income Home Energy Assistance Program

Table 9.J2.—Federal net allocations and amounts carried over, by state, fiscal years 1997–1999—*Continued*

State	Amount of regular federal allocation	Amount of supplemental federal allocation	Carried over to following fiscal year
Low-income Home Energy Assistance Program funds: 1999 <sup>1</sup>			
Total <sup>1</sup> .....	\$1,060,819,242	\$174,599,382	\$42,151,190
Alabama .....	9,156,163	...	396,311
Alaska .....	4,816,179	...	317,899
Arizona .....	4,099,508	...	...
Arkansas .....	7,024,524	...	1,573,467
California .....	49,026,236	...	...
Colorado .....	17,204,666	...	387,339
Connecticut .....	22,463,661	3,123,251	...
Delaware .....	2,981,619	694,531	271,152
District of Columbia .....	3,488,644	1,085,603	205,153
Florida .....	14,560,812	...	3,014,188
Georgia .....	11,517,016	...	350,000
Hawaii .....	1,159,827	...	10,549
Idaho .....	6,606,661	...	220,590
Illinois .....	62,175,536	15,958,676	...
Indiana .....	28,144,672	7,141,955	...
Iowa .....	19,951,229	3,498,425	405,000
Kansas .....	9,148,744	3,302,242	...
Kentucky .....	14,649,860	7,749,823	859,535
Louisiana .....	9,411,602	...	...
Maine .....	14,020,965	753,964	408,383
Maryland .....	17,200,142	3,576,484	628,590
Massachusetts .....	44,916,788	7,759,149	3,652,154
Michigan .....	58,789,938	3,934,824	4,987,988
Minnesota .....	42,527,935	3,080,093	...
Mississippi .....	7,879,426	...	200,000
Missouri .....	24,835,337	7,637,125	3,432,901
Montana .....	6,685,555	...	85,986
Nebraska .....	9,854,648	2,132,186	732,958
Nevada .....	2,091,007	...	152,525
New Hampshire .....	8,505,234	774,056	40,452
New Jersey .....	41,610,645	9,031,094	2,985,268
New Mexico .....	5,156,031	...	234,855
New York .....	135,968,512	28,247,775	4,162,476
North Carolina .....	19,920,759	26,457,523	...
North Dakota .....	7,167,598	...	507,097
Ohio .....	55,003,555	8,489,614	1,152,317
Oklahoma .....	7,785,924	...	948,067
Oregon .....	13,236,969	...	1,032,175
Pennsylvania .....	73,162,492	12,957,432	3,025,488
Rhode Island .....	7,375,560	1,716,490	31,084
South Carolina .....	7,311,347	...	1,141,686
South Dakota .....	5,714,996	...	351,852
Tennessee .....	14,839,995	...	...
Texas .....	24,233,721	...	...
Utah .....	7,856,070	...	713,770
Vermont .....	6,374,976	474,893	127,898
Virginia .....	20,951,696	7,639,727	1,791,653
Washington .....	21,074,256	...	473,821
West Virginia .....	9,694,925	2,891,975	847,179
Wisconsin .....	38,281,248	4,490,472	...
Wyoming .....	3,203,833	...	291,384

<sup>1</sup>Net of set-asides to direct-grant Indian tribes/tribal organizations and the insular areas.

Source: Low-Income Home Energy Assistance Program, U.S. Administration for Children and Families' administrative data.

CONTACT: Leon Litow (202) 401-5304 for further information.

## 9.J Low-Income Home Energy Assistance Program

Table 9.J2.1—Federal net allocations and amounts carried over, by state, fiscal years 1982–1999

Fiscal year	Low-income Home Energy Assistance Program funds <sup>1</sup>		
	Amount of regular federal allocation	Amount of supplemental federal allocation	Carried over to following fiscal year
1982.....	\$1,855,265,713	\$123,000,000	\$167,622,219
1983.....	1,954,327,406	...	126,734,742
1984.....	2,052,395,279	2,200,000	160,512,007
1985.....	2,078,044,805	...	103,191,230
1986.....	1,988,842,779	...	100,034,095
1987.....	1,804,751,604	...	128,664,885
1988.....	1,516,388,203	...	76,987,683
1989.....	1,369,642,868	...	68,307,592
1990.....	1,379,023,013	49,700,470	53,923,488
1991.....	1,400,498,244	193,443,923	73,292,715
1992.....	1,460,448,621	24,431,796	78,189,483
1993.....	1,307,182,655	23,663,576	36,828,086
1994.....	1,397,090,175	322,170,703	91,639,371
1995.....	1,855,265,713	123,000,000	167,622,219
1996.....	867,303,740	178,061,574	81,479,264
1997.....	964,896,037	211,876,438	59,564,206
1998.....	964,167,635	150,896,688	55,654,317
1999.....	1,060,819,242	174,599,382	42,151,190

<sup>1</sup>Net of set-asides to direct-grant Indian tribes/tribal organizations and the insular areas.

Source: Low-Income Home Energy Assistance Program, U.S. Administration for Children and Families' administrative data.

CONTACT: Leon Litow (202) 401-5304 for further information.

9.J Low-Income Home Energy Assistance Program

Table 9.J3.—Estimated home energy assistance obligations, by type of assistance and state, fiscal years 1997–1999

State	Heating assistance benefits	Cooling assistance benefits	Crisis assistance benefits	Weatherization assistance benefits
Estimated Amount: 1997 <sup>1</sup>				
Total .....	<sup>2</sup> \$749,704,757	<sup>3</sup> \$18,755,118	\$176,095,176	\$153,589,045
Alabama.....	5,830,577	...	2,711,801	495,000
Alaska.....	3,733,663	...	74,937	47,181,255
Arizona.....	23,032,890	(3)	457,388	885,780
Arkansas.....	3,517,192	...	1,806,598	1,365,425
California.....	<sup>2</sup> 26,260,573	(3)	8,502,595	15,074,072
Colorado.....	17,563,743	...	370,053	2,858,896
Connecticut.....	21,793,624	...	4,096,647	...
Delaware.....	2,500,632	...	102,629	308,129
District of Columbia.....	2,420,434	...	427,254	640,881
Florida.....	<sup>2</sup> 8,682,322	(3)	3,938,698	2,763,264
Georgia.....	9,920,230	...	...	1,864,701
Hawaii.....	<sup>2</sup> 854,660	(3)	271,548	...
Idaho.....	3,720,628	...	1,143,912	1,237,160
Illinois.....	52,811,770	...	5,241,395	9,576,402
Indiana.....	24,701,779	...	3,068,010	3,360,745
Iowa.....	17,484,616	306,982	1,151,621	3,686,382
Kansas.....	7,282,063	...	1,790,955	1,332,912
Kentucky.....	8,701,462	...	4,648,157	2,445,353
Louisiana.....	3,239,607	...	...	1,372,070
Maine.....	11,696,873	4,535,452	304,139	2,273,881
Maryland.....	14,269,602	...	504,532	...
Massachusetts.....	38,627,195	...	(5)	2,835,936
Michigan.....	39,192,409	...	13,743,248	4,459,098
Minnesota.....	44,803,997	...	7,937,324	2,383,352
Mississippi.....	4,764,167	...	333,166	...
Missouri.....	18,991,968	1,787,925	8,100,000	...
Montana.....	5,838,126	...	46,839	1,259,347
Nebraska.....	4,307,321	...	4,225,859	1,336,863
Nevada.....	1,502,034	417,705	19,267	...
New Hampshire.....	6,794,957	452,624	730,883	800,000
New Jersey.....	35,651,367	...	1,910,000	3,108,217
New Mexico.....	4,103,392	1,726,000	300,449	835,194
New York.....	80,597,313	...	32,655,454	21,905,111
North Carolina.....	5,216,233	...	10,754,869	4,078,042
North Dakota.....	6,282,228	...	201,856	2,955,558
Ohio.....	24,776,680	50,000	22,442,499	8,297,287
Oklahoma.....	6,316,555	...	653,008	757,935
Oregon.....	9,429,185	...	72,808	3,089,276
Pennsylvania.....	49,008,836	...	13,796,209	11,845,623
Rhode Island.....	5,503,616	...	253,450	1,200,000
South Carolina.....	6,081,943	...	590,167	1,174,735
South Dakota.....	6,120,498	...	59,584	1,332,649
Tennessee.....	9,401,925	...	2,593,634	1,296,817
Texas.....	6,728,436	648,409	3,656,759	4,303,632
Utah.....	5,310,753	7,898,599	165,019	1,988,030
Vermont.....	5,389,829	...	838,206	100,000
Virginia.....	17,229,067	...	159,248	1,695,865
Washington.....	16,266,212	931,422	355,096	3,471,957
West Virginia.....	4,966,029	...	2,227,212	1,593,612
Wisconsin.....	28,242,562	...	6,660,111	5,898,056
Wyoming.....	2,240,984	...	83	864,545

See footnotes at end of table.

## 9.J Low-Income Home Energy Assistance Program

Table 9.J3.—Estimated home energy assistance obligations, by type of assistance and state, fiscal years 1997–1999—*Continued*

State	Heating assistance benefits	Cooling assistance benefits	Crisis assistance benefits	Weatherization assistance benefits
Estimated Amount: 1998 <sup>1</sup>				
Total.....	<sup>2</sup> \$633,618,243	<sup>3</sup> \$62,178,981	\$212,043,081	\$138,217,577
Alabama.....	4,581,398	...	9,967,400	980,000
Alaska.....	3,357,402	...	104,718	44,388,936
Arizona.....	22,408,314	(3)	701,667	749,212
Arkansas.....	2,897,999	2,303,058	2,747,241	1,849,949
California.....	<sup>2</sup> 20,822,171	(3)	9,739,868	10,954,643
Colorado.....	20,359,208	...	458,966	2,720,074
Connecticut.....	18,875,502	...	2,175,354	...
Delaware.....	1,949,425	...	114,996	391,774
District of Columbia.....	2,083,376	...	448,222	561,914
Florida.....	<sup>2</sup> 2,654,265	<sup>3</sup> 4,631,367	23,377,490	4,313,680
Georgia.....	8,701,308	10,278,329	...	2,837,834
Hawaii.....	<sup>2</sup> 713,922	(3)	237,412	...
Idaho.....	2,961,477	...	535,659	1,351,840
Illinois.....	35,809,968	...	2,629,540	6,985,646
Indiana.....	21,327,410	1,171,767	2,640,346	3,314,931
Iowa.....	12,424,215	...	1,011,528	2,721,582
Kansas.....	5,646,619	...	1,605,023	1,123,011
Kentucky.....	7,749,812	...	3,866,113	2,101,637
Louisiana.....	2,728,416	3,819,781	8,670,206	1,155,565
Maine.....	8,636,320	...	345,408	2,260,132
Maryland.....	14,079,929	...	389,740	140,000
Massachusetts.....	33,380,601	...	(5)	4,280,040
Michigan.....	40,200,000	...	7,450,480	1,000,000
Minnesota.....	26,279,401	...	6,512,473	1,933,770
Mississippi.....	6,071,094	3,241,433	487,434	...
Missouri.....	16,855,027	...	3,907,051	...
Montana.....	4,871,979	...	45,423	794,140
Nebraska.....	3,756,483	448,704	2,710,555	1,076,736
Nevada.....	1,313,888	464,426	...	...
New Hampshire.....	5,480,092	...	630,321	600,000
New Jersey.....	27,556,443	1,944,000	2,576,000	5,384,083
New Mexico.....	1,467,599	389,211	1,425,051	703,342
New York.....	70,199,073	...	26,760,128	18,758,021
North Carolina.....	6,284,055	...	15,953,653	4,128,478
North Dakota.....	4,008,468	120,000	581,435	1,643,000
Ohio.....	25,435,321	...	15,348,595	6,843,754
Oklahoma.....	5,488,400	4,977,000	556,499	637,354
Oregon.....	7,234,289	...	32,501	2,652,169
Pennsylvania.....	44,486,068	...	13,865,771	9,980,000
Rhode Island.....	5,395,945	...	260,433	1,000,000
South Carolina.....	4,670,204	...	5,596,320	997,350
South Dakota.....	4,357,788	...	60,327	779,667
Tennessee.....	8,651,281	7,401,714	2,528,666	1,431,370
Texas.....	10,000,000	20,988,191	23,208,715	11,521,720
Utah.....	6,016,932	...	160,772	352,641
Vermont.....	4,620,455	...	1,189,736	190,588
Virginia.....	15,229,395	...	434,428	1,152,767
Washington.....	13,865,140	...	356,139	2,980,286
West Virginia.....	5,225,630	...	2,085,614	793,530
Wisconsin.....	22,684,505	...	5,421,833	4,972,011
Wyoming.....	1,764,231	...	129,831	728,400

See footnotes at end of table.

## 9.J Low-Income Home Energy Assistance Program

Table 9.J3.—Estimated home energy assistance obligations, by type of assistance, and state, fiscal years 1997–1999—*Continued*

State	Heating assistance benefits	Cooling assistance benefits	Crisis assistance benefits	Weatherization assistance benefits
Estimated Amount: 1999 <sup>1</sup>				
Total .....	<sup>2</sup> \$684,600,568	<sup>3</sup> \$72,294,009	\$210,175,301	\$145,039,987
Alabama .....	4,334,898	...	3,408,034	389,354
Alaska .....	<sup>2</sup> 5,469,575	...	77,382	4,387,304
Arizona .....	2,992,307	(2)	493,402	837,500
Arkansas .....	3,482,832	...	2,524,724	1,756,131
California .....	<sup>2</sup> 17,567,157	(3)	12,534,928	13,382,930
Colorado .....	14,401,728	...	384,150	2,652,610
Connecticut .....	17,441,272	...	4,117,901	...
Delaware .....	2,005,539	565,800	87,880	551,423
District of Columbia .....	2,871,554	...	565,445	548,169
Florida .....	<sup>2</sup> 2,890,935	<sup>3</sup> 3,578,319	7,530,433	2,010,114
Georgia .....	8,475,954	...	...	1,557,999
Hawaii .....	<sup>2</sup> 829,208	(3)	215,713	...
Idaho .....	4,565,299	...	452,023	838,385
Illinois .....	43,530,070	17,166,080	5,423,791	...
Indiana .....	24,167,415	2,538,447	1,676,326	4,211,300
Iowa .....	12,494,831	...	1,168,487	3,173,847
Kansas .....	8,022,490	...	1,329,902	1,870,478
Kentucky .....	7,061,323	6,104,255	4,744,602	3,084,467
Louisiana .....	1,623,315	4,869,918	721,470	1,414,648
Maine .....	10,523,168	636,320	523,398	2,405,855
Maryland .....	16,491,111	2,845,348	570,448	150,000
Massachusetts .....	33,934,032	6,748,300	...	4,299,600
Michigan .....	41,140,699	(5)	6,736,217	9,122,344
Minnesota .....	25,739,080	...	9,853,994	1,957,328
Mississippi .....	5,133,471	1,414,186	336,654	...
Missouri .....	17,556,313	...	8,987,271	...
Montana .....	4,644,676	...	214,331	1,037,889
Nebraska .....	3,533,812	469,013	4,945,637	1,491,260
Nevada .....	1,238,286	499,171	1,416	...
New Hampshire .....	5,679,162	696,656	809,221	800,000
New Jersey .....	31,305,717	2,000,000	10,727,985	3,607,000
New Mexico .....	3,097,853	...	546,679	773,404
New York .....	85,498,591	...	29,581,769	25,098,238
North Carolina .....	11,794,326	...	24,484,664	2,720,435
North Dakota .....	4,603,413	...	888,835	1,070,640
Ohio .....	27,347,922	...	22,350,627	9,275,584
Oklahoma .....	7,035,173	...	397,548	703,185
Oregon .....	8,951,696	...	51,227	2,984,502
Pennsylvania .....	50,132,354	...	19,925,770	10,411,788
Rhode Island .....	5,118,275	...	1,763,431	1,383,293
South Carolina .....	5,509,527	...	845,304	1,267,956
South Dakota .....	4,640,124	...	49,796	857,249
Tennessee .....	5,492,190	4,146,141	1,567,313	1,460,309
Texas .....	2,885,363	12,390,089	1,697,272	3,635,058
Utah .....	6,237,673	...	101,850	681,729
Vermont .....	4,331,310	318,900	1,313,192	...
Virginia .....	19,477,808	2,866,295	1,389,647	3,364,719
Washington .....	15,035,740	...	689,240	3,227,870
West Virginia .....	5,053,136	...	4,532,380	1,701,927
Wisconsin .....	28,831,369	...	7,493,380	6,083,208
Wyoming .....	1,570,275	...	151,433	800,958

<sup>1</sup>Includes federal LIHEAP appropriated funds and non-federal funds operated through the LIHEAP program.

<sup>2</sup>Includes funds for households that received combined heating and cooling assistance in Arizona, California, and Florida; households that received energy assistance in Hawaii with no differentiation made between heating and cooling assistance.

<sup>3</sup>Excludes funds for households that received combined heating and cooling assistance in Arizona, California, and Florida; households that received energy assistance in Hawaii with no differentiation made between heating and cooling assistance.

<sup>4</sup>Includes \$6.2 million in state funds.

<sup>5</sup>Excludes funds for households that received expedited heating assistance for winter crisis situations.

Source: Low-Income Home Energy Assistance Program, U.S. Administration for Children and Families' administrative data.

CONTACT: Leon Litow (202) 401-5304 for further information.

## 9.J Low-Income Home Energy Assistance Program

Table 9.J3.1—Estimated home energy assistance obligations, by type of assistance fiscal years 1982–1999

Fiscal year	Estimated amount <sup>1</sup>			
	Heating assistance benefits	Cooling assistance benefits	Crisis assistance benefits	Weatherization assistance benefits
1982.....	\$1,124,476,630	\$51,498,572	\$138,941,133	\$136,195,046
1983.....	1,343,267,155	33,020,830	191,771,756	195,463,612
1984.....	1,372,772,591	32,374,067	225,795,893	186,662,906
1985.....	1,466,721,924	29,135,118	191,407,205	227,096,051
1986.....	1,351,903,078	35,620,945	199,178,003	193,420,839
1987.....	1,280,302,113	29,581,262	197,719,071	220,419,633
1988.....	1,145,560,993	21,151,405	190,046,023	170,292,505
1989.....	1,017,024,757	12,341,113	187,442,779	147,952,928
1990.....	1,030,150,903	25,007,676	188,844,316	133,479,484
1991.....	1,098,583,280	27,416,776	220,795,517	129,279,737
1992.....	990,903,081	22,645,002	197,218,623	134,816,010
1993.....	948,596,196	22,274,975	183,189,522	146,444,590
1994.....	1,062,552,111	24,862,635	225,583,805	214,342,289
1995.....	884,846,144	43,883,481	212,713,182	159,076,150
1996.....	696,801,144	17,597,204	167,622,219	135,835,358
1997.....	749,704,757	18,755,118	176,095,176	153,589,045
1998.....	633,618,243	62,178,981	212,043,081	138,217,577
1999.....	684,600,568	72,294,009	210,175,301	145,039,987

<sup>1</sup>Includes federal LIHEAP appropriated funds and non-federal funds operated through the LIHEAP program.

Source: Low-Income Home Energy Assistance Program, U.S. Administration for Children and Families' administrative data.



## Sampling Variability

A substantial number of tables in sections 5 and 6 present OASDI award and current-pay benefit data based on 1-percent and 10-percent sample files drawn from the Social Security Administration's administrative records. In addition, tables 4.B1-4.B11 on the taxable earnings of OASDI workers are based on 1-percent administrative record samples, and tables 7.A8, 7.B9, and 7.E2 on SSI awards are based on 10-percent administrative record samples.

Because of sampling variability, estimates based on sample data may differ from the figures that would have been obtained had all, rather than specified samples, of the records been used. The standard error is a measure of the sampling variability. About 68 percent of all possible probability samples selected with the same specifications will give estimates within one standard error of the figure obtained from a compilation of all records. Similarly, approximately 90 percent will give estimates within 1.645 standard errors, about 95 percent will give estimates within two standard errors, and about 99 percent will give estimates within two and one-half standard errors. The standard error of an estimate depends on the design elements such as the method of sampling, sample size, and the estimation process.

Because of the large number of data cells tabulated from the sample files, it is not practical to calculate the standard error for every possible cell. However, standard errors for a large number of cells were estimated. These estimates were used to fit regression curves to provide estimates of approximate standard errors associated with tabulated counts and proportions.

The tables showing the sampling variability provide a general order of magnitude for similar estimates from the various sample files. Table 10.A1 presents approximate standard errors for the estimated number of persons from the 1-percent and the 10-percent files. The reliability of an estimated percentage depends on both the size of the percentage and on the size of the total on which the percentage is based. Data in tables 10.A2 and 10.A3 provide approximations of the standard errors of the estimated percentage of persons in the 1-percent and 10-percent files. The standard errors are expressed in percentage points and the bases shown are in terms of inflated data.

Table 10.A1.— Approximations of standard errors of estimated number of persons

Size of estimate (inflated)	Standard error
1-percent file	
500 .....	250
1,000 .....	300
2,500 .....	500
5,000 .....	800
7,500 .....	900
10,000 .....	1,100
25,000 .....	1,700
50,000 .....	2,400
75,000 .....	3,000
100,000 .....	3,400
250,000 .....	5,400
500,000 .....	7,800
750,000 .....	9,600
1,000,000 .....	11,100
5,000,000 .....	25,800
10,000,000 .....	36,900
25,000,000 .....	57,700
50,000,000 .....	76,100
75,000,000 .....	82,900
10-percent file	
100 .....	30
500 .....	70
1,000 .....	100
5,000 .....	225
10,000 .....	300
50,000 .....	700
100,000 .....	1,000
500,000 .....	2,200
1,000,000 .....	3,200
2,000,000 .....	4,300
3,000,000 .....	5,300
5,000,000 .....	6,500
10,000,000 .....	8,500
20,000,000 .....	9,300

## Sampling Variability

Table 10.A2.— Approximations of standard errors of estimated percentage of persons from 1-percent file

Size of base (inflated)	Estimated percentage				
	2 or 98	5 or 95	10 or 90	25 or 75	50
1,000.....	4.7	7.3	10.1	14.5	16.8
10,000.....	1.5	2.3	3.2	4.6	5.3
50,000.....	.7	1.0	1.4	2.1	2.4
100,000.....	.5	.7	1.0	1.5	1.7
500,000.....	.2	.3	.4	.7	.8
1,000,000.....	.1	.2	.3	.5	.5
5,000,000.....	.1	.1	.1	.2	.2
10,000,000.....	(1)	.1	.1	.2	.2
50,000,000.....	(1)	(1)	(1)	.1	.1
100,000,000.....	(1)	(1)	(1)	(1)	(1)

<sup>1</sup> Less than 0.05 percent.

Table 10.A3.— Approximations of standard errors of estimated percentage of persons from 10-percent file

Size of base (inflated)	Estimated percentage				
	2 or 98	5 or 95	10 or 90	25 or 75	50
500.....	1.9	3.0	4.1	5.9	6.8
1,000.....	1.3	2.1	2.9	4.1	4.8
2,500.....	.8	1.3	1.8	2.6	3.0
10,000.....	.4	.6	.9	1.3	1.5
50,000.....	.2	.3	.4	.6	.7
100,000.....	.1	.2	.3	.4	.5
500,000.....	(1)	.1	.1	.2	.2
1,000,000.....	(1)	.1	.1	.1	.2
5,000,000.....	(1)	(1)	(1)	(1)	.1
10,000,000.....	(1)	(1)	(1)	(1)	(1)
50,000,000.....	(1)	(1)	(1)	(1)	(1)

<sup>1</sup> Less than 0.05 percent.

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## OASDI Benefit Award Data

OASDI benefit award data in the *Annual Statistical Supplement* are derived mainly from two sources:

*100-percent award data:* The Master Beneficiary Record (MBR) is the major administrative data base for the Social Security program. It is used for the calculation of benefits and the maintenance of information about beneficiaries. Each month, when the MBR is updated, a record of award actions is created. This record is used to prepare award data on a 100-percent basis. Data available each month include types of benefits awarded, sex of beneficiary, and the monthly benefit amounts payable. These data are used to update the time-series tables.

*Award data from the OASDI 1-percent sample:* This source provides monthly award data based on a 1-percent sample derived from the MBR. The 12 monthly files are combined to produce an annual file. The 1-percent sample is used to prepare award tables, which show detailed data by age, sex, and type of benefit, and distributions by benefit amount. Award data from the 1-percent sample are similar to the data described above. An important difference, however, is the treatment of dual entitlement.

When a retired-worker beneficiary subsequently becomes dually entitled to a secondary benefit as a wife, husband, or widow or widower, the secondary benefit is counted as an award in the 100-percent data. In contrast, award data based on the OASDI 1-percent sample do not count the secondary benefit as an award when both benefits are paid from the same trust fund.

When dual entitlements are counted as awards, the number of awardees is increased and the monthly amount awarded is lowered. The person has already been counted as having received an award when he or she became entitled to the retired-worker benefit, and is counted again upon entitlement to the secondary benefit. The average benefit amount is lowered because the amount recorded for the award for the dually entitled person is only the difference between the amount of the retired-worker benefit and the amount of the secondary benefit.

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## Poverty Data

Table 3.E1 presents weighted average poverty thresholds for families in the United States for 1959–2000. Table 3.E2 presents data on the number and percent of people in poverty in the United States for 1959–1999. Tables 3.E3, 3.E4, and 3.E6 present more detailed data on people and families in poverty in the United States during 1999. (Both poverty thresholds and poverty population data are issued by the U.S. Census Bureau.) Table 3.E8 presents poverty guidelines by family size for the contiguous United States, Alaska, and Hawaii for 1965–2001. (Poverty guidelines are issued by the U.S. Department of Health and Human Services.)

Poverty thresholds are used primarily for statistical purposes—producing statistics on the number of Americans in poverty. Poverty guidelines are used for administrative purposes—for example, to determine whether a person or family is financially eligible for assistance or services under certain federal government programs (not including cash public assistance). Both thresholds and guidelines are sets of dollar figures which vary by family size and (in the case of the thresholds) family composition.

The poverty thresholds were developed in 1963–64 by Mollie Orshansky of the Social Security Administration as a measure of income inadequacy. The poverty definition was modified in 1969 and 1981 by federal interagency committees. The thresholds were based on food expenditure/income patterns (from the Department of Agriculture's 1955 Household Food Consumption Survey) and the costs of the Department of Agriculture's economy food plan for families of different sizes and compositions. (See Joseph Dalaker, U.S. Census Bureau, "Poverty in the United States: 1998," *Current Population Reports: Consumer Income*, Series P60-207, September 1999, Appendix A, for an explanation of the poverty definition.)

The poverty thresholds have become the basis for the official statistics on the extent of poverty in the United States which are issued annually by the Census Bureau in the Current Population Reports series. The thresholds are adjusted annually for price changes using the annual average consumer price index (CPI-U). (See U.S. Bureau of the Census, "Revision in Poverty Statistics, 1959 to 1968," *Current Population Reports: Special Studies*, Series P-23, No. 28, August 1969; and Directive No. 14, "Definition of Poverty for Statistical Purposes," *Statistical Policy Handbook*, U.S. Department of Commerce, Office of Federal Statistical Policy and Standards, 1978.)

The poverty guidelines are a simplified version of the poverty thresholds; there are separate sets of guidelines for the two noncontiguous states (Hawaii and Alaska). The guidelines are used for determining whether a person or family is financially eligible for assistance or services under certain federal programs. Authorizing legislation or

regulations for specific programs indicate whether a program uses the poverty guidelines as one of several eligibility criteria, uses a modification of the guidelines (for example, 125 percent or 185 percent of the guidelines), or uses them for the purpose of setting priorities in providing assistance or services.

Since 1973, the guidelines have been computed from the poverty thresholds by increasing the most recently published weighted average poverty thresholds by the percentage change in the CPI-U over the past year (more precisely, from the next most recent calendar year to the most recent calendar year) and rounding the figure for a family of four up to the next highest multiple of \$50. Figures for all family sizes over and under four persons are computed by adding or subtracting equal dollar amounts derived from the average difference between poverty lines (rounded to the nearest multiple of \$20).

The poverty thresholds were calculated using data (the 1955 Household Food Consumption Survey) that defined income as after-tax money income; accordingly, the thresholds were intended to be applied to data on money income. The National Research Council's Panel on Poverty and Family Assistance put great emphasis on the principle of consistency in poverty measurement—that the definition of family resources (income) used should be consistent with the concept underlying the poverty thresholds. (For a discussion of this principle, see *Measuring Poverty: A New Approach*, Constance F. Citro and Robert T. Michael (eds.), Washington, DC, National Academy Press, 1995, pp. 4, 9-10, 37-40, 65-66, 98, 203-206, and 227-231. This important report proposed a new approach for developing an official poverty measure for the United States.) According to the Panel's principle of consistency, it would be inappropriate to apply the current poverty thresholds (calculated using an income definition of after-tax money income) to an income distribution that used an income definition of money income plus selected noncash benefits.

As noted above, the poverty thresholds were developed in 1963–64 by Mollie Orshansky of the Social Security Administration. In May 1965—just over a year after the Johnson Administration had initiated the War on Poverty—the Office of Economic Opportunity adopted Orshansky's thresholds as a working or quasi-official definition of poverty. At that time, the thresholds comprised a matrix of 124 detailed poverty thresholds based on the total number of family members, the number of family members who were children, the sex of the family householder, the age of the individual or family householder (for one- and two-person units only), and whether the family lived on a farm.

In 1969, a federal interagency committee made two changes in the poverty definition: the thresholds would be annually updated by the consumer price index instead of by

the per capita cost of the economy food plan, and farm poverty thresholds were set at 85 percent rather than 70 percent of corresponding nonfarm thresholds. (Figures for prior years were retabulated retrospectively on this basis.) In August 1969, the Bureau of the Budget designated the poverty thresholds with these revisions as the federal government's official statistical definition of poverty.

In 1981, several other changes were made in the poverty definition: (1) elimination of separate thresholds for farm families, (2) elimination (through appropriate averaging) of separate thresholds for female-householder and "all other" families, and (3) extension of the poverty matrix to make the largest family size category "nine persons or more" rather than "seven or more persons." (See U.S. Bureau of the Census, "Characteristics of the Population Below the Poverty Level: 1980," *Current Population Reports: Consumer Income*, Series P-60, No. 133, July 1982, pp. 2-5, 9, and 186.) As a result of these changes, the current matrix of poverty thresholds used by the Census Bureau to determine the poverty status of families and unrelated individuals consists of a set of 48 detailed thresholds arranged in a two-dimensional matrix by family size (from one person, that is, an unrelated individual, to a family of nine or more persons) cross-classified by the presence and number of family members under age 18 (from no children to eight or more children present). Unrelated individuals and two-person families are further differentiated by the age of the individual or family householder (under age 65 and aged 65 or older).

The current official definition of poverty is over 30 years old. In 1990, Congress requested a study of the official U.S. poverty measure by the National Research Council (NRC) to provide a basis for a possible revision of the poverty measure. In 1992, the NRC's Committee on National Statistics appointed a Panel on Poverty and Family Assistance to conduct this study. In 1995, the Panel published its report of the study, *Measuring Poverty: A New Approach*, Constance F. Citro and Robert T. Michael (eds.), Washington, DC, National Academy Press, 1995. In the report, the Panel proposed a new approach for developing an official poverty measure for the United States—although it did not propose a specific set of dollar figures. The Panel's proposed approach focused on three major areas: new poverty thresholds, a new and consistent definition of family resources (income), and data sources.

In July 1999, the Census Bureau, in collaboration with the Bureau of Labor Statistics, released a report, *Experimental Poverty Measures: 1990 to 1997 (P60-205)* that examined the effects of different resource definitions and thresholds on poverty and which estimated several experimental poverty rates based on the NRC panel's recommendations. That report and subsequent updates are available on the Census Bureau poverty measurement webpage at:

<http://www.census.gov/hhes/www/poverty.html>.

Data on the poverty population and on family and personal income are collected in the March Current Population Survey (CPS). Data from the March survey are also known as the Annual Demographic File. Following the standard Census Bureau definition, the family is defined as two or more persons related by birth, marriage, or adoption and residing together. "Income" refers to money income from all sources, including public income transfers, but before federal, state, or local personal income taxes. Money income does not reflect that many families receive noncash benefits such as employee use of business transportation and facilities, employer-paid health insurance and other employer-supported fringe benefits, Medicare, Medicaid, food stamps, and housing assistance. Many farm families receive benefits in the form of rent-free housing or goods produced and consumed by the family.

Once a year, in March, the sample of U.S. households interviewed in the monthly CPS is asked to provide information on household members' incomes during the preceding calendar year. Survey experience indicates that respondents tend to underreport their income in household surveys. Underreporting is most pronounced for dividends, interest and workers' compensation; less pronounced for veterans' payments, public assistance, and private pensions; and modest for Social Security and federal retirement programs. The proportion of nonresponses to CPS income questions is greater among middle income and higher income families than among lower income families.

Because the CPS sample size, content, and procedures changed several times, some differences in the data over time may in part reflect these methodological changes, not just changes in the population. Important changes to the CPS methodology took place in 1976, 1979, 1980, 1987, 1988, 1992, 1994 and 1995. A summary of these changes and references for more information about them appear below. The report numbers, "P60-##" refer to the Current Population Reports, Consumer Income series.

For details about how questionnaire changes and file processing changes affected the data, see Welniak, Edward, "Effects of the March Current Population Survey's New Processing System on Estimates of Income and Poverty," Proceedings of the American Statistical Association, 1990.

Further details about CPS methodology may be found in Technical Paper 63, available at <http://www.bls.census.gov/cps/tp/tp63.htm>.

If you need to find additional poverty data, please contact the U.S. Census Bureau's Housing and Household Economic Statistics Division Information Staff at (301) 457-3242, or e-mail [hhes-info@census.gov](mailto:hhes-info@census.gov).

For further information about technical changes to the poverty measure, contact Joe Dalaker at (301) 457-3213 or e-mail [joseph.dalaker@census.gov](mailto:joseph.dalaker@census.gov).

## Poverty Data

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For further information about the statistical reliability of the CPS estimates, contact [dsmd\\_s&a@census.gov](mailto:dsmd_s&a@census.gov).

<u>Year</u>	<u>Methodological change</u>	<u>Reference</u>
1959	First year for which poverty data are available. The poverty measure was developed in 1963–1964.	P60-210 Appendixes
1969	Modification of poverty measure. Bureau of the Budget prescribed the new measure as the official poverty measure for statistical use in federal agencies.	P60-68 pp. 11–12
1976–1987	For wide income intervals, Pareto interpolation was used to compute median income. Before 1976 and after 1987, linear interpolation was used.	P60-166 p. 93
1979	"Householder" concept first implemented, replacing "head" concept—the husband is no longer automatically the family reference person. Secondary families (people who are related to each other but not the householder) are tallied separately from "families."  Change in universe—income questions no longer asked of 14-year-olds. Poverty universe changed—people under age 15 not living with any family members are excluded. (Previously, unrelated individuals under age 14 were excluded.)	P60-130 pp. 6–10
1980	Modification of poverty measure. Estimates weighted using 1980 Census results.	P60-133 pp. 2–7
1987	New CPS processing system.	P60-166 pp. 1, 14–17 Welniak, 1990 ASA proceedings
1988	Linear interpolation used to compute median incomes.	P60-166 p.93
1992	Estimates first weighted using 1990 Census results.	P60-188 p. vii
1994	Computer-assisted interviewing replaced pencil-and-paper interviewing.	P60-189 p. vii
1994–1995	New CPS sample design.	P60-189 p. vii, D-3  P60-194 p. v, xiii, D-3
1995	Revised edit and allocation procedures for race groups.	P60-194 pp. v, xiii

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CONTACT: Gordon Fisher/Joe Dalaker (202) 690-5880/(310) 457-3213 for further information.

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## Computing a Retired-Worker Benefit

This section provides instructions and a worksheet for computing a retired-worker benefit. The worksheet can be used for persons born in 1926 through 1939—that is, those who attained age 62 in 2001 or earlier and were under age 75 at the end of 2001. The worksheet assumes that the worker had no prior period of entitlement to disability benefits and also did not work after becoming entitled to retired-worker benefits.

The worksheet describes the various steps used in computing a benefit. The steps are based on the following Social Security program goals.

*To provide a benefit based on lifetime earnings.* Benefits are related to earnings over a period of time that the worker could be expected to have worked in covered employment—from age 22 through age 61. The years of earnings considered are termed computation years. The worker's five lowest earnings years, including years of no earnings at all) are not considered in the computation. They are termed the drop out years.

*To index lifetime earnings.* Earnings used in the computation are not the actual covered earnings, but an amount for each year which reflects earnings increases in average wage levels after the year the earnings were paid. This procedure is termed wage indexing. Currently, earnings are generally indexed to wage levels in the year the worker turns age 60. For example, for a person attaining age 62 in 2001, actual earnings in 1984 of \$20,000 are indexed to \$37,768.46, based on 1999 wage levels. Earnings after age 60 are included at their actual (nominal) value.

*To replace a portion of the indexed earnings.* Indexed earnings are averaged over the number of computation years to calculate the Average Indexed Monthly Earnings (AIME). A benefit formula is applied to the AIME to produce the Primary Insurance Amount (PIA), the amount payable to a worker who retires at age 65. The benefit formula is weighted to provide a higher replacement of earnings for lower wage workers. The formula for persons age 62 in 2001 is 90 percent of the first \$561 of AIME; plus 32 percent of the next \$2,820; plus 15 percent of the AIME over \$3,381.

*To permit early retirement.* Persons can retire as early as age 62, but the monthly benefit is reduced. The reduction is 5/9 of 1 percent for each of the first 36 months of entitlement immediately preceding the age at which 100 percent of PIA is payable (65 and 4 months in the year 2001 but scheduled to increase to age 67 by the year 2022), plus 5/12 of 1 percent for each of up to 24 earlier months. For a person aged 62 in 2001, the maximum reduction is 21.66667 percent if the individual is entitled to benefits for all 40 months between 62 and 65 and 4 months.

*To provide for price indexing after age 62.* Benefits are adjusted annually in December to reflect increases in the Consumer Price Index (CPI-W). The 2000 benefit increase was 3.5 percent. These cost-of-living adjustments are applied to the benefit for each year after the person attained age 62—even if the person was not actually receiving benefits.

*To give credit for earnings after age 61.* Earnings after age 61 (which are not indexed) can be substituted for earnings in earlier years if they result in a higher benefit. In addition, persons who do not receive benefits between ages 65 and 69 may receive increased benefits as a result of the Delayed Retirement Credit (DRC) provision. The benefit is increased by a specified percentage for each month a benefit was not received (See table 2.A20 for percentage increase).

### Clarifying the Worksheet Procedure

#### Step 1 - Determining the Number of Computation Years

For persons who attain age 62 prior to 1991, the number of years used in the benefit computation equals the number of years after 1950 up to the year of attainment of age 62, minus 5 years. For workers who attain age 62 in 1991 or later, the number of computation years is 35.

#### Step 2 - Wage Indexing of Earnings

The following description and examples are provided for persons who wish to compute the index factors and indexed earnings. The indexing year is the second year prior to attainment of age 62. However, beneficiaries born on January 1 are deemed to have attained age 62 in the prior year, and consequently, the applicable indexing year, factors, and bend points are those for that year.

The average wage for the indexing year is divided by the average wage in each prior year to obtain the factor for each prior year. For example, a person attains age 62 in 2001. The indexing year is 1999. The average annual wage for 1999 was \$30,469.84. The average annual wage for 1990 was \$21,027.98. The amount, \$30,469.84 divided by \$21,027.98, yields a factor of 1.4490141.

The worker's actual earnings covered under Social Security in that year, up to the maximum earnings creditable, are multiplied by the indexing factor to obtain the indexed earnings. For example, actual covered earnings of \$10,000 in 1990, multiplied by 1.4490141, result in indexed earnings of \$14,490.14; actual earnings of \$51,300 (the maximum creditable) result in indexed earnings of \$74,334.42.

**Step 3 - Computing the Average Indexed Monthly Earnings (AIME)**

After the earnings in each year have been indexed, they are used in computing Average Indexed Monthly Earnings. The years of highest indexed earnings corresponding to the number of computation years are selected and totaled. This total is then divided by the years. The result, rounded to the nearest lower dollar, is Average Indexed Monthly Earnings.

For example, for a person attaining age 62 in 2001, the highest 35 years of indexed earnings are used. If the sum of these earnings equals \$400,000, the AIME is \$952 (\$400,000 divided by 420 = \$952.38, rounded to \$952).

**Step 4 - Computing the Primary Insurance Amount (PIA)**

The PIA, the amount from which all Social Security benefits payable on a worker's earnings record are based, is computed by applying a formula to the AIME. The formula consists of brackets in which 3 percentages are applied to amounts of AIME. The dollar amounts defining the brackets are called bend points, and the bend points are different for each calendar year of attainment of age 62. The PIA is rounded to the nearest lower ten cents.

For retired workers who attained age 62 in 2001, the bend points are \$561 and \$3,381. Thus the formula is 90 percent of the first \$561 of AIME; plus 32 percent of next \$2,820 of AIME; plus 15 percent of AIME above \$3,381. The following are examples of PIA computations for such workers with different AIME amounts.

Example 1 - AIME of \$300

PIA is \$270

Based on: 90 percent of \$300

Example 2 - AIME of \$952

PIA is \$630.02 rounded to \$630.00

Based on: 90 percent of \$561 (\$504.90); plus  
32 percent of \$391 (\$125.12)

Example 3 - AIME of \$3,500

PIA is \$1,425.15 rounded to \$1,425.10

Based on: 90 percent of \$561 (\$504.90); plus  
32 percent of \$2,820 (\$902.40); plus  
15 percent of \$119 (\$17.85)

The above calculations are applicable to workers who attain age 62 in 2001. For workers who attained age 62 in prior years, the bend points will be different and the PIA must be increased to reflect cost-of-living adjustments between the year of attainment of age 62 and the year 2001. Worksheet 2 shows cost-of-living increase factors for 1979 through 2001. After the PIA is calculated for the year of attainment of age 62, cost-of-living increases are applied for each year through 2000. The result is the current 2001 PIA.

For example, a worker who attained age 62 in 1998 would receive cost-of-living adjustments for the years 1998–2000. The adjustments are cumulative, with each step rounded to the next lower dime. If the age 62 PIA was \$500, the cost-of-living adjustments would be:

1998: \$500 multiplied by 1.013 = \$506.50

1999: \$506.50 multiplied by 1.024 = \$518.60

2000: \$518.60 multiplied by 1.035 = \$536.70

\$536.70 would be the PIA effective December 2000.

**Step 5 - Computation of the Monthly Benefit**

The full PIA is payable to a worker who retires at age 65. However, beginning in the year 2000, the full retirement age scheduled to be gradually raised to age 67 for workers attaining age 62 in 2022 began to be phased in. Workers can still retire as early as age 62, but the monthly benefit is reduced by 5/9 of 1 percent for each of the first 36 months of entitlement immediately preceding the full retirement age plus 5/12 of 1 percent for each of up to 24 earlier months. Workers attaining age 62 in 2001 have their benefits computed based on the full retirement age of 65 and 4 months. Worksheet 3 may be used to determine the full retirement age based on the year of birth as well as the reduction factors. For individuals electing benefits at exactly age 62 in the year 2001, the maximum reduction is 21.66667 percent.

For example, in 2001 a worker with a PIA of \$500 would receive \$391 at age 62. The PIA is reduced by \$108.33, reflecting a reduction rate of 5/9 of 1 percent for each of 36 months and a rate of 5/12 of 1 percent for each of 4 months for a total reduction of 21.66667 percent. After reduction of the PIA by \$108.33, the benefit amount is rounded down to the nearest lower dollar.



**Instructions for computing a retired-worker benefit (only for workers attaining age 62 in years 1988–2001)**

<b>STEP 1.—Determining the Number of Computation Years</b>		
1	Year of birth. (If your birthday is January 1, enter prior year.)	
2	Age "62" has been entered.	62
3	Add lines 1 and 2 to obtain year of attainment of age 62 (year of eligibility).	
4	Year of attainment of age 22. If 1951 or earlier, enter 1951. (If your birthday is January 1, enter prior year.)	
5	Subtract line 4 from line 3 (elapsed years).	
6	"5" (drop-out years) has been entered.	5
7	Subtract line 6 from line 5 (computation years-maximum 35).	
<b>STEP 2.—Indexing of Earnings (Use Worksheet 1 for Steps 2 and 3.)</b>		
8	Enter in column 2 your earnings in each year 1951 through 2000. If none, enter "0."	
9	Column 3 contains the maximum earnings creditable under Social Security for each year.	
10	Enter in column 4 the lower amount from columns 2 or 3 for each year.	
11	Enter in column 5 the indexing factors applicable to the year you attained age 62 (line 3) from table 2.A8. (This table contains the indexing factors for persons attaining age 62 during the period 1988-2001.)	
12	Multiply column 4 by column 5 and enter results in column 6 in dollars and cents. These are your indexed earnings.	
<b>STEP 3.—Computing the Average Indexed Monthly Earnings (AIME)</b>		
13	Enter the number of computation years from line 7.	
14	Place an "X" in column 7 next to the highest indexed earnings corresponding with the number of computation years from line 13.	
15	Add all individual indexed earnings marked with an "X."	
16	Multiply line 13 (computation years) by 12 to obtain the number of months in the computation period.	
17	Divide line 15 by line 16.	
18	Round the result in line 17 to next lower dollar. This is your average indexed monthly earnings (AIME).	
<b>STEP 4.—Computing the Primary Insurance Amount (PIA) (Use Worksheet 2 for Step 4.)</b>		
19	Enter first bend point from Worksheet 2 based on year of attainment of age 62, or prior year if birthday is January 1.	
20	Enter second bend point from Worksheet 2.	
21	If your AIME (obtained in line 18) is equal to or less than line 19, complete lines 22–24; If greater than line 19 but less than or equal to line 20, complete lines 25–30; If greater than line 20, complete lines 31–37.	
22	Enter your AIME from line 18.	
23	"0.9" has been entered. If you receive a pension based on noncovered employment see table 2.A11.1.	0.9
24	Multiply line 22 by line 23 and round to next lower dime to obtain your PIA at age 62. Continue with line 38.	
25	Enter your AIME from line 18.	
26	Multiply line 19 by 0.9. If you receive a pension based on noncovered employment see table 2.A11.1.	
27	Subtract line 19 from line 25.	
28	"0.32" has been entered.	0.32
29	Multiply line 27 by line 28.	
30	Add lines 26 and 29 and round to next lower dime to obtain your PIA at age 62. Continue with line 38.	
31	Enter your AIME from line 18.	
32	Multiply line 19 by 0.9. If you receive a pension based on noncovered employment see table 2.A11.1.	
33	Subtract line 19 from line 20 and multiply by 0.32.	
34	Subtract line 20 from line 31.	
35	"0.15" has been entered.	0.15
36	Multiply line 34 by line 35.	
37	Add lines 32, 33, and 36 and round to next lower dime to obtain your PIA at age 62. Continue with line 38.	
38	If you attained age 62 in 2001, skip to line 44. Otherwise you will need to adjust your PIA to reflect cost-of-living adjustments (COLAs) from the year you attained age 62 through 2000 by using lines 39–43 and Worksheet 2.	
39	Enter year of attainment of age 62 from line 3.	
40	Place an "X" corresponding to the year you attained age 62 in column 5, Worksheet 2.	

**OASDI: Computing a Retired-Worker Benefit****Instructions for computing a retired-worker benefit (only for workers attaining age 62 in years 1988–2001)—Continued**

41	Place an "X" in column 5 (Worksheet 2) next to each subsequent year through 2000.	
42	Enter your age 62 PIA from either line 24, 30, or 37—here and in shaded box in column 6, Worksheet 2.	
43	Beginning with first year marked, multiply your age 62 PIA by the corresponding factor (column 4), round to lower dime, and enter in column 6. The resulting PIA is then multiplied by the next factor and is again rounded to lower dime. Continue this process through 2000. Enter this last figure, which is your current PIA.	

**STEP 5.—Computing the Monthly Benefit**

44	Enter your current PIA from either line 24, 30, 37, or 43.	
45	Using Worksheet 3, determine your full retirement age and enter here.	
46	If you retired at your full retirement age round PIA from line 44 to next lower dollar to obtain your monthly benefit.	
47	If you retired before the full retirement age enter your age at retirement including year and months.	
48	Subtract line 47 from line 45 and convert the result to months to determine the total number of reduction months.	
49	If line 48 is greater than 36 subtract 36 and enter the number here.	
50	"0.0055556" (the decimal equivalent of 5/9ths of 1 percent—the monthly reduction factor for the first 36 months) has been entered.	0.0055556
51	"0.0041667" (the decimal equivalent of 5/12ths of 1 percent—the monthly reduction factor for months above 36) has been entered.	0.0041667
52	Multiply line 48 (but not more than 36) by line 50 to obtain the percentage reduction for the first 36 months.	
53	Multiply line 49 by line 51 to obtain the percentage reduction for months in excess of 36.	
54	Add lines 52 and 53 to obtain the total percentage reduction.	
55	Multiply line 44 by line 54 to obtain the amount of benefit reduction.	
56	Subtract line 55 from line 44 and round to next lower dollar to obtain your monthly benefit.	

**Worksheet 1: Indexing of earnings**

1 Year	2 Your earnings	3 Maximum taxable earnings	4 Lower of columns 2 or 3	5 Indexing factor	6 Column 4 times column 5	7 Highest indexed earnings
1951		\$3,600				
1952		3,600				
1953		3,600				
1954		3,600				
1955		4,200				
1956		4,200				
1957		4,200				
1958		4,200				
1959		4,800				
1960		4,800				
1961		4,800				
1962		4,800				
1963		4,800				
1964		4,800				
1965		4,800				
1966		6,600				
1967		6,600				
1968		7,800				
1969		7,800				
1970		7,800				
1971		7,800				
1972		9,000				
1973		10,800				
1974		13,200				
1975		14,100				
1976		15,300				
1977		16,500				
1978		17,700				
1979		22,900				
1980		25,900				
1981		29,700				
1982		32,400				
1983		35,700				
1984		37,800				
1985		39,600				
1986		42,000				
1987		43,800				
1988		45,000				
1989		48,000				
1990		51,300				
1991		53,400				
1992		55,500				
1993		57,600				
1994		60,600				
1995		61,200				
1996		62,700				
1997		65,400				
1998		68,400				
1999		72,600				
2000		76,200				

**Worksheet 2: Computing the primary insurance amount (PIA) for workers retiring after age 62**

Year	1 1st bend point	2 2nd bend point	3 Cost-of-living increase	4 Cost-of-living factor	5	6
						Age 62
1979	\$180	\$1,085	9.9	1.099		
1980	194	1,171	14.3	1.143		
1981	211	1,274	11.2	1.112		
1982	230	1,388	7.4	1.074		
1983	254	1,528	3.5	1.035		
1984	267	1,612	3.5	1.035		
1985	280	1,691	3.1	1.031		
1986	297	1,790	1.3	1.013		
1987	310	1,866	4.2	1.042		
1988	319	1,922	4.0	1.040		
1989	339	2,044	4.7	1.047		
1990	356	2,145	5.4	1.054		
1991	370	2,230	3.7	1.037		
1992	387	2,333	3.0	1.030		
1993	401	2,420	2.6	1.026		
1994	422	2,545	2.8	1.028		
1995	426	2,567	2.6	1.026		
1996	437	2,635	2.9	1.029		
1997	455	2,741	2.1	1.021		
1998	477	2,875	1.3	1.013		
1999	505	3,043	2.4	1.024		
2000	531	3,202	3.5	1.035		
2001	561	3,381	...	...		

## OASDI: Computing a Retired-Worker Benefit

### Worksheet 3: Determining the full retirement age

Year of birth <sup>1</sup>	Year of attainment of age 62	Year of attainment of age 65	Full retirement age	Maximum reduction months	Maximum reduction at age 62 <sup>2</sup>
1935 .....	1997	2000	65 years	36	0.2000000
1936 .....	1998	2001	65 years	36	0.2000000
1937 .....	1999	2002	65 years	36	0.2000000
1938 .....	2000	2003	65 years and 2 months	38	0.2083333
1939 .....	2001	2004	65 years and 4 months	40	0.2166667
1940 .....	2002	2005	65 years and 6 months	42	0.2250000
1941 .....	2003	2006	65 years and 8 months	44	0.2333333
1942 .....	2004	2007	65 years and 10 months	46	0.2416667
1943–1954 .....	2005–2016	2008–2019	66 years	48	0.2500000
1955 .....	2017	2020	66 years and 2 months	50	0.2583333
1956 .....	2018	2021	66 years and 4 months	52	0.2666667
1957 .....	2019	2022	66 years and 6 months	54	0.2750000
1958 .....	2020	2023	66 years and 8 months	56	0.2833333
1959 .....	2021	2024	66 years and 10 months	58	0.2916667
1960 or later .....	2022 and later	2025 and later	67 years	60	0.3000000

<sup>1</sup> If your birthday is January 1, refer to previous year.

<sup>2</sup> The monthly reduction factor for the first 36 months is .0055556 and .0041667 for additional months.

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## Glossary

<b>Actuarial reduction (OASDI)</b>	Reduction in monthly benefit amount payable on— <ol style="list-style-type: none"><li>(1) Entitlement prior to full retirement age if the beneficiary is a retired worker, a wife or husband of a retired or disabled worker (with entitlement not based on caring for a child beneficiary), or a divorced spouse;</li><li>(2) Entitlement prior to full retirement age if the beneficiary is a widow, widower, or a surviving divorced spouse; or</li><li>(3) Entitlement, in case of disability, at ages 50–59 if the beneficiary is a widow, widower, or surviving divorced spouse. (For formulas used to compute the reduction, see "Benefit Types and Levels" in the section Social Security (Old-Age, Survivors, and Disability Insurance.))</li></ol>
<b>Administrative Law Judge (OASDI and SSI)</b>	An Administrative Law Judge (ALJ) is an employee of SSA and is specially qualified by education and experience to hold hearings and make independent decisions based on all the evidence, including any testimony. See <b>Administrative review process</b> .
<b>Administrative review process (OASDI and SSI)</b>	The procedures followed by the Social Security Administration (SSA) in determining one's right under title II and title XVI of the Social Security Act. The administrative review process consists of several steps, which usually must be requested within certain time periods and in the following order: <ol style="list-style-type: none"><li>(1) <i>Initial determination</i>: A determination SSA makes about an individual's entitlement to benefits or about any other matter that gives that person a right to further administrative and/or judicial review.</li><li>(2) <i>Reconsideration</i>: The first step in the administrative review process. When an individual disagrees with the initial determination, the individual may, within 60 days of receiving notice of the initial determination, ask SSA to reconsider it.</li><li>(3) <i>Hearing before an Administrative Law Judge (ALJ)</i>: When an individual disagrees with the reconsidered determination, he or she may, within 60 days of receiving notice of the determination, request a hearing before an ALJ. The hearing is informal and nonadversarial.</li><li>(4) <i>Appeals Council review</i>: When an individual disagrees with the decision or dismissal of the ALJ, he or she may, within 60 days of receiving the hearing decision, request that the Appeals Council review that decision. The Appeals Council, within the Office of Hearings and Appeals, may deny or dismiss the request for review, or it may grant the request and either issue a decision or remand (return) the case to an ALJ. The Appeals Council may also review any ALJ action on its own motion within 60 days after the ALJ's action. The Appeals Council's decision or the hearing decision if the Council denies the request for review, represents SSA's final decision in the administrative review process. See <b>Expedited appeals process</b> and <b>Federal court review</b>.</li></ol>
<b>Adult (SSI)</b>	A person older than age 21, aged 18–21 who is not regularly attending school, or a person under 21 who is married or the head of a household.
<b>Age (OASDI)</b>	In current-pay benefit data tables, the age classification is based on the age of the person at his or her last birthday. In award data, age is either age in month of award or age in year of award, as specified in tables.
<b>Aged beneficiary (OASDI)</b>	A person who qualifies for benefits on the basis of age rather than on the basis of child care or disability.
<b>Aged enrollee (Medicare)</b>	An individual aged 65 or older enrolled in the Medicare program.
<b>Aged person (SSI)</b>	A person aged 65 or older.

<b>Allowance (DI)</b>	A determination that a worker is entitled to a cash disability benefit award or to the establishment of a period of disability because of an inability to work by reason of any physical or mental impairment.
<b>Allowed charge (Medicare)</b>	An individual charge determination (approved amount) made by a carrier on a covered medical service or supply.
<b>Annual maximum taxable limit (OASDI and HI)</b>	The dollar amount above which earnings in Social Security covered employment is neither taxable nor creditable for benefit computation purposes. (Also referred to as "contribution and benefit base," "annual creditable maximum," "maximum contribution and benefit base," "taxable maximum," and "maximum taxable.") Under the HI program, there is no upper limit on earnings subject to taxes. See table 2.A3.
<b>Assigned claim (Medicare)</b>	A claim for which the physician or supplier agrees to accept the amount approved by Medicare as the total payment. The physician or supplier is paid 80 percent of the approved fee schedule (less any unmet deductible). The beneficiary can be charged only for the coinsurance, the remaining 20 percent of the approved amount. A participating physician or supplier agrees to accept assignment on all claims.
<b>Auxiliary benefit (OASDI)</b>	Monthly benefit payable to a spouse or child of a retired or disabled worker, or to a survivor of a deceased worker.
<b>Average</b>	See <b>Mean</b> .
<b>Average indexed monthly earnings—AIME (OASDI)</b>	<p>The resulting monthly earnings of a worker after indexing of actual earnings to reflect the value of the individual's previous earnings relative to national average earnings in the indexing year. A formula is then applied to this figure to compute the primary insurance amount (PIA) for most workers who attain age 62, become disabled, or die after 1978. The indexing year is the second year before the year in which the worker attains age 62, becomes disabled, or dies. Taxable earnings after the indexing year are included at their actual value. For widow(er)'s first eligible after December 1984, the indexing year applicable to the deceased worker's earnings may alternatively be the second year before the widow(er)'s date of eligibility for survivors benefits if it results in a higher benefit.</p> <p>Earnings are indexed by multiplying the worker's taxable earnings for each year after 1950 through the indexing year by the average wages of all workers for the indexing year, and dividing by the average wages of all workers for the year being indexed. Once the earnings have been indexed, the AIME is computed by—</p> <ol style="list-style-type: none"> <li>(1) determining the number of computation years—the number of years after 1950 (or the year of attainment of age 21, if later) and up to the year in which the worker attains age 62, becomes disabled, or dies, minus dropout years, generally 5 (minimum number of computation years is 2);</li> <li>(2) selecting the actual computation years, based on highest indexed earnings from any years after 1950; and</li> <li>(3) dividing the sum of indexed earnings in the computation years by the total number of months in the computation years.</li> </ol> <p>For workers entitled to disability benefits after June 1980, the number of dropout years varies by the age attained in year of disability onset. The number is 0, 1, 2, 3, 4, and 5 for workers aged 26 or younger, 27–31, 32–36, 37–41, 42–46, and 47 or older, respectively. Effective for months after June 1981, however, disabled workers under age 37 may obtain up to 3 additional dropout years (3, 2, and 1, respectively, for those aged 26 or younger, 27–31, and 32–36) for which the worker had no earnings and was living with a child (of the worker or his or her spouse) under age 3.</p>

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**Average monthly wage—AMW  
(OASDI)**

The amount of earnings used as the basis for determining the primary insurance amount (PIA) for workers who attained age 62, became disabled, or died before 1979, and also under a transitional guarantee computation for workers who attained age 62 in 1979–83. The AMW is computed by—

- (1) determining the number of computation years—the number of years after 1950 (or the year of attainment of age 21, if later) and up to the year in which the worker attains age 62 (age 65 for men born before January 2, 1911, and the later of age 62 or the year 1975 for men born after January 1, 1911), becomes disabled, or dies, minus dropout years, generally 5 (minimum number of computation years is 2);
- (2) selecting the actual computation years, based on highest earnings (up to the amount of the annual maximum taxable earnings in each year), from any years after 1950; and
- (3) dividing the sum of earnings in the computation years by the total number of months in the computation years.

See the last paragraph under AIME for special dropout rules for disabled workers. An alternative computation method takes into account the worker's earnings after 1936. The method yielding the highest PIA is used.

The transitional guarantee computation is applicable to workers who attained age 62 in 1979–83, and to survivors of such workers (if the PIA under the transitional guarantee computation is higher than under the AIME method). It excludes earnings beginning with the year of attainment of age 62.

**Award (OASDI)**

A determination that an individual is entitled to a specified type of benefit. An award action is processed adding the individual to the Social Security benefit rolls maintained for that type of benefit and is counted as an award in a particular month. Award actions are processed not only for new beneficiaries but also for persons already on the rolls whose benefits in one category are terminated but who become entitled to another type of benefit. These actions are called conversions. When a disabled worker attains the full retirement age, the worker benefit and the benefits of spouses and children are converted to the retirement category. Upon the death of a disabled worker, benefits for children are converted to the survivor child category and benefits for spouses caring for these children are converted to widowed mothers and fathers benefits. Benefits for spouses of retired and disabled workers entitled because of age are converted to nondisabled widows and widowers benefits upon the death of the worker. The above conversions are counted in the award data. The benefits for children of retired workers that are converted to benefits for children of deceased workers upon the death of the worker are not counted in the award data.

**Base years (OASDI)**

For computing Social Security benefits, the years after 1950 up to the year a person is entitled to retirement or disability benefits. For a survivor's claim, the base years include the year of the worker's death.

**Bend points (OASDI)**

The dollar amounts defining the AIME (Average Indexed Monthly Earnings) or PIA (Primary Insurance Amount) brackets in the benefit formulas. See tables 2.A11 and 2.A13.

**Beneficiary (OASDI)**

A person who has been awarded benefits on the basis of his or her own or another's earnings record. The benefits may be either in current-payment status or withheld.

**Benefit period (Medicare)**

An alternate name for "spell of illness."

**Benefit reduction (OASDI)**

See **Actuarial reduction**.

**Benefit termination (OASDI)**

See **Termination**.

<b>Benefits in force (OASDI)</b>	The sum of the number of persons with benefits in current-payment status and persons with benefits withheld.
<b>Benefits withheld (OASDI)</b>	See <b>Withholding</b> .
<b>Blind (OASDI and SSI)</b>	"Blindness" for Social Security purposes means either central visual acuity of 20/200 or less in the better eye with the use of a correcting lens, or a limitation in the fields of vision so that the widest diameter of the visual field subtends an angle of 20 degrees or less (tunnel vision).
<b>Black Lung Benefits Program</b>	Provides for monthly payments and medical treatment to coal miners totally disabled from pneumoconiosis (black lung) arising from employment in or around the nation's coal mines, augmented payments based on the number of miner's dependents, and payments to certain survivors of miners who died due to or while totally disabled from pneumoconiosis.
<b>Buy-In (Medicare)</b>	A Medicare beneficiary who is also eligible for Medicaid, and for whom Part B (Supplementary Medical Insurance) premiums are paid by a state Medicaid program.
<b>Capitation (Medicare)</b>	A prospective payment method that pays the provider of service a uniform amount for each person served usually on a monthly basis. Capitation is used in managed care alternatives such as Health Maintenance Organizations.
<b>Carrier (Medicare)</b>	An entity that the Centers for Medicare & Medicaid Services contracts to process physician/supplier claims and make payments for Part B (Supplementary Medical Insurance) services.
<b>Child (SSI)</b>	An unmarried blind or disabled person who is not the head of a household and who is either under age 18 or aged 18–21 and regularly attending school.
<b>Childhood disability benefit (OASDI)</b>	See <b>Disabled child's benefit</b> .
<b>Child's benefit (OASDI)</b>	Monthly benefits to children of a retired or disabled worker or of a deceased worker who died either fully or currently insured. Benefits are payable to unmarried children under age 18 (up to age 19 if attending elementary or secondary school full time) and to disabled children aged 18 or older who became disabled before age 22. Under certain circumstances, benefits can be paid to stepchildren, grandchildren, or adopted children. Benefits for disabled children may be continued if they marry certain other Social Security beneficiaries.
<b>Claimant (OASDI and SSI)</b>	The person on whose behalf an application for benefits is filed.
<b>Coinsurance (Medicare)</b>	See <b>Cost-sharing</b> .
<b>Computation starting date (OASDI)</b>	December 31 of either 1936 or 1950. Taxable earnings after the applicable starting date are counted in computing average monthly earnings (only starting date of Dec. 31, 1950 is applicable in computing average indexed monthly earnings).
<b>Consumer Price Index (OASDI and Medicare)</b>	A relative measure of inflation prepared by the U. S. Department of Labor. The CPI charts the rise in costs for selected goods and services and is used to compute COLA increases. In this report, all references to the CPI relate to the CPI for Urban Wage Earners and Clerical Workers (CPI-W).
<b>Continuing disability review (DI and SSI)</b>	A periodic review to determine if a disabled individual is still medically eligible to receive benefits.
<b>Contributions (OASDI and Medicare)</b>	The amount based on a percentage of earnings, up to an annual maximum, that must be paid by— (1) employers and employees on wages from employment under FICA (Federal Insurance Contributions Act),



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	(2) the self-employed on net earnings from self-employment under SECA (Self-Employment Contributions Act), and
	(3) states on the wages of state and local government employees covered under the Social Security Act through voluntary agreements under section 218 of the Act.
	Generally, employers withhold contributions from wages, add an equal amount of contributions, and pay both on a current basis. Also referred to as "taxes."
<b>Conversion of benefits (OASDI)</b>	For persons already on the rolls whose benefits are terminated and who are then awarded a different type of benefit. The type of benefit award that include a significant number of conversions are retired-worker benefits at full retirement age (previously disabled-worker benefits) and benefits of a spouse and child of retired worker (previously spouse and child of disabled worker). See <b>Award</b> .
<b>Cost-of-Living Adjustment (COLA)</b>	Social Security benefits and Supplemental Security Income payments are increased each year to keep pace with increases in the cost of living (inflation). The Consumer Price Index is used to compute COLA increases.
<b>Cost sharing (Medicare)</b>	The generic term that includes copayments, coinsurance, and deductibles; also, out-of-pocket expenses.
	Copayments—Flat fees, typically modest, that insured persons must pay for a particular unit of services, such as an office visit, emergency room visit, or the filing of a prescription.
	Coinsurance—Portion of the costs paid by the beneficiary after meeting the annual deductible.
	Deductibles—The annual amount payable by the beneficiary for covered services before Medicare makes reimbursement.
<b>Couple (SSI)</b>	See <b>Eligible couple</b> .
<b>Covered earnings (OASDI)</b>	Earnings in employment covered by the OASDI programs.
<b>Covered employment (OASDI)</b>	All employment and self-employment creditable for Social Security purposes.
<b>Covered worker (OASDI)</b>	A person who has earnings creditable for Social Security purposes on the basis of services for wages in covered employment and/or on the basis of income from self-employment.
<b>Current-payment status (OASDI)</b>	Status of a beneficiary who is paid a benefit for a given month, with or without deductions, provided the deductions add to less than a full month's benefit. The amount shown is prior to deduction for the Part B (Supplementary Medical Insurance) premium. A benefit in current—payment status at the end of a month is usually payable in the following month.
<b>Deductible (Medicare)</b>	The amounts paid by enrollees for covered services before Medicare makes reimbursements.
	<i>Hospital Insurance</i> —Deductible applies to each new benefit period. It is determined each year by a formula specified by law, and approximates the current cost of a 1-day inpatient hospital stay.
	<i>Supplementary Medical Insurance</i> —Deductible is the first \$100 of covered charges per calendar year.
<b>Deeming (SSI)</b>	Takes into account the income and resources of certain persons who live with an SSI recipient when determining the amount of the payment. These persons include the ineligible spouses of adult recipients, the ineligible parents of child recipients under age 18, and the immigration sponsor for certain noncitizens.

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<b>Delayed retirement credit (OASDI)</b>	<p>Increases the benefit amount for certain individuals who did not receive benefits for months after attainment of the full retirement age but before age 70. Delayed retirement credit increases apply for benefits beginning January of the year following the year the individual attains full retirement age.</p> <p>Each monthly credit serves as a basis for increasing the monthly benefit (unless the benefit is based on a special minimum PIA) by specified percentages that depend on the year the worker attains age 62. The monthly credit was 1/12 of 1 percent for workers who attained age 62 before 1979 and ¼ of 1 percent for workers who attained age 62 from 1979 through 1986. The corresponding monthly credits for workers who attain age 62 after 1986 are shown in table 2.A20. The increase is applicable to the worker's monthly benefit amount but not to his or her PIA. Hence, auxiliary benefits are generally not affected. However, a widow(er)'s benefit may be increased based on the credit that had been applied to the benefit of the deceased worker or for which the worker was eligible at the time of death.</p>
<b>Dependents benefit (OASDI)</b>	Monthly benefit payable to a spouse or child of a retired or disabled worker.
<b>Diagnosis-Related Groups (Medicare)</b>	A classification system that groups patients according to diagnosis, type of treatment, age, and other relevant criteria. Under the prospective payment system, hospitals are paid a set fee for treatment of patients in a single DRG category, regardless of the actual cost of care for the individual.
<b>Diagnostic group (OASDI and SSI)</b>	Classification of medical conditions, by body system, and identifies the medical condition(s) on which disability-related benefits are based. Prior to 1985, the coding of the primary and secondary diagnoses for OASDI and SSI claimants was in accordance with the <i>International Classification of Diseases, 9th Revision, Clinical Modification (ICD-9-CM)</i> , using 4-digit ICD-9 codes. In 1985, SSA implemented a revised method to determine and enter impairment codes on administrative records. This revised approach provides for a modified impairment coding system, using <i>three digits</i> (followed by zero), loosely based on ICD-9. For research purposes, ICD-9 codes and SSA impairment codes are, typically, not identical. However, the diagnostic groupings shown in the statistical tables closely parallel the major ICD-9 disease classifications.
<b>Direct deposit (OASDI and SSI)</b>	A procedure by which beneficiaries have their monthly benefit checks sent, electronically, directly to financial institutions they designate.
<b>Disability (DI)</b>	<p>The inability to engage in substantial gainful activity (SGA) by reason of any medically determinable physical or mental impairment that can be expected to result in death or can be expected to last for a continuous period of not less than 12 months. Special rules apply for workers aged 55 or older whose disability is based on blindness.</p> <p>The law generally requires that a person be disabled continuously for 5 months before he or she can qualify for a disabled-worker benefit.</p>
<b>Disability (SSI)</b>	<p>The inability to engage in substantial gainful activity (SGA) by reason of any medically determinable physical or mental impairment that can be expected to result in death or can be expected to last for a continuous period of not less than 12 months. This 12-month requirement does not apply to the blind.</p> <p>The SGA criterion does not apply to children under age 18. The standard for them is a medically determinable physical or mental impairment which results in marked and severe functional limitations.</p>
<b>Disabled child's benefit (OASDI)</b>	A monthly benefit payable to a disabled person aged 18 or older—son, daughter, or eligible grandchild of retired, deceased, or disabled worker—whose disability began before age 22. (Also referred to as "disabled adult child.")

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<b>Disabled enrollee (Medicare)</b>	A person under age 65 who has been entitled to disability benefits under title II of the Social Security Act or Railroad Retirement system for at least 2 years.
<b>Disabled surviving divorced husband's benefit (OASDI)</b>	See <b>Widow/widower's benefit</b> .
<b>Disabled surviving divorced wife's benefit (OASDI)</b>	See <b>Widow/widower's benefit</b> .
<b>Disabled widower's benefit (OASDI)</b>	See <b>Widow/widower's benefit</b> .
<b>Disabled widow's benefit (OASDI)</b>	See <b>Widow/widower's benefit</b> .
<b>Disabled-worker benefit (DI)</b>	A monthly benefit payable to a disabled worker under full retirement age insured for disability. Before November 1960, disability benefits were limited to disabled workers aged 50–64.
<b>Divorced husband's benefit (OASDI)</b>	See <b>Husband's benefit</b> .
<b>Divorced wife's benefit (OASDI)</b>	See <b>Wife's benefit</b> .
<b>Drug addiction and alcoholism (OASDI and SSI)</b>	Legislation enacted in 1996 eliminated drug addiction and alcoholism (DA&A) as a basis for entitlement to Social Security and SSI disability benefits, effective Jan. 1, 1997. Individuals for whom drugs and/or alcohol is deemed a contributing factor material to the determination of disability will not be entitled to disability benefits. Individuals already receiving disability benefits as of the effective date would cease receiving them (although they could request a new medical determination) unless they are found to be disabled due to a medical impairment other than DA&A.
<b>Dual entitlement (OASDI)</b>	Entitled to a worker (primary) benefit and a higher secondary benefit. The primary benefit is paid in full but the secondary benefit is paid only in the amount by which it exceeds the primary benefit. If the two benefits are financed from the same trust fund, the beneficiary is usually represented only once in the statistics, as a retired-worker or a disabled-worker beneficiary, and the benefit amount recorded is the larger amount associated with the auxiliary benefit. If the benefits are paid from different trust funds the beneficiary is represented twice.
<b>Durable Medical Equipment (Medicare)</b>	Includes certain medical supplies and such items as hospital beds and wheel chairs used in a patient's home.
<b>Early retirement (OASDI)</b>	Age 62, with actuarially reduced benefits, is the earliest age a person may receive Social Security retirement benefits.
<b>Earnings (OASDI and Medicare)</b>	All wages from employment and net earnings from self-employment, whether or not taxable or covered.
<b>Earnings test (OASDI)</b>	The provision requiring the withholding of benefits if nondisabled beneficiaries under full retirement age have earnings in excess of certain exempt amounts. See table 2.A29.
<b>Eligible couple (SSI)</b>	Two persons living together as married, both of whom are eligible for SSI.
<b>Eligible individual (SSI)</b>	An aged, blind, or disabled person eligible for SSI.
<b>Eligible worker (OASDI)</b>	For retirement benefits, an individual who meets the insured status and age requirements for benefits whether or not he or she has filed an application; for Disability Insurance benefits, an individual who meets the insured status requirements and has established a period of disability.

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<b>Emergency advance payments (SSI)</b>	Payments available at initial application for individuals who need cash assistance before their first Supplemental Security Income payment arrives. This advance is withheld from the first check.
<b>End Stage Renal Disease (Medicare)</b>	Permanent kidney failure.
<b>Entitlement (OASDI)</b>	<p>The state of meeting the applicable requirements for receipt of benefits, including the filing of an application. Entitlement can be retroactive and thus precede the date of award. The retroactive period can be 12 months for disabled workers, their spouses and children, and disabled widows and widowers. The maximum retroactive period for other types of beneficiaries is 6 months.</p> <p>Retroactive benefits for months before full retirement age are not payable to a retired worker, a spouse or a widow(er) if a permanent reduction of the monthly benefit amount would result. However, persons filing for a widow's or widower's benefit in the month immediately following the month of the worker's death may elect a 1-month retroactivity, even if reduced benefits would result. A person can be entitled to more than one benefit simultaneously (dual entitlement). Most dual entitlements cases consist of persons entitled to a worker benefit and a higher spouse's benefit or widow(er)'s benefit.</p> <p>Technical entitlement occurs when a beneficiary is entitled to benefits on more than one earnings record but is eligible to receive benefits on only one earnings record. There are two types of technical entitlement:</p> <ol style="list-style-type: none"> <li>(1) Simultaneous technical entitlement: beneficiary is entitled to the same type of benefit on more than one earnings record;</li> <li>(2) Potential dual entitlement: the secondary benefit amount potentially exceeds the primary benefit, but reduction for age or family maximum causes the primary benefit to exceed the secondary benefit amount.</li> </ol>
<b>Expedited appeals process (OASDI and SSI)</b>	This permits an individual to go directly to a federal district court after review of the initial determination without first completing the administrative review process, if the only dispute is whether an applicable provision of the Social Security Act is constitutional. See <b>Administrative review process</b> .
<b>Family benefit (OASDI)</b>	The sum of the individual monthly benefits payable to all the beneficiaries entitled on the basis of a single earnings record. See <b>Maximum family benefit</b> .
<b>Family classification (OASDI)</b>	As used in statistical tables, the number and types of beneficiaries entitled to benefits on a single earnings record. Since the family classification is determined by the types of beneficiaries entitled, it can differ from actual family status. For example, a married couple is classified as a worker-and-spouse family if both persons are entitled on the earnings record of one of them. If both persons were entitled on their own earnings record they would be designated as two worker-only families.
<b>Father's benefit (OASDI)</b>	A monthly benefit payable to a widower or surviving divorced father if (1) the deceased worker on whose account the benefit is paid was either fully or currently insured at the time of death and (2) an entitled child of the worker in his care is under age 16 or is disabled.
<b>Federal benefit rates (SSI)</b>	The basic benefit standards used in computing the amount of federal SSI payments. Benefit levels differ for individuals and couples living in households and for persons in Medicaid institutions. Individuals or couples living in their own households receive the full federal benefit. The federal benefit is reduced by one-third, if an individual or couple is living in another person's household and receiving support and maintenance there. The federal benefit rates are increased annually to reflect increases in the cost of living.

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<b>Federal court review (OASDI and SSI)</b>	When an individual disagrees with SSA's final decision he or she may request judicial review by filing a civil action in a federal district court. See <b>Administrative review process</b> .
<b>Federally administered payments (SSI)</b>	Federal SSI payments and state supplementation payments issued by SSA on behalf of states.
<b>Federally administered state supplementation (SSI)</b>	Cash payments provided by a state and issued by SSA, which is also responsible for the maintenance of payment records. See <b>State supplementation</b> .
<b>Food Stamp Program</b>	The program issues monthly allotments of coupons that are redeemable at retail food stores, or provides benefits through electronic benefit transfer to help single people and families with little or no income to buy food.
<b>Full retirement age (OASI)</b>	The age at which a person may first become entitled to unreduced retirement benefits. For persons reaching age 62 before 2000, the normal retirement age is 65. It will increase gradually to 67 for persons reaching that age in 2027 or later, beginning with an increase to 65 years and 2 months for persons reaching age 65 in 2003. The higher full retirement age affects the benefit amount if a person chooses to receive reduced benefits.
<b>Government pension offset (OASDI)</b>	A law that affects spouse's or widow(er)'s benefits. Benefits are subject to reduction by any government pensions payable to the spouse on the basis of his or her own earnings in noncovered employment. The offset reduces the Social Security benefit amount by two-thirds of the amount of the government pension.
<b>Gross Domestic Product—GDP</b>	The total dollar value of all goods and services produced by labor and property located in the United States, regardless who supplies the labor or property.
<b>Health Maintenance Organization (Medicare)</b>	Competitive medical plans, including Medicare+Choice, that have contracts with the Centers for Medicare & Medicaid Services on a prospective capitation basis for providing health care to Medicare beneficiaries.
<b>Home Health Agency (Medicare and Medicaid)</b>	A public or private organization that provides skilled nursing services and other therapeutic services in the patient's home and that meets certain conditions to ensure the health and safety of the individual.
<b>Home health services (Medicare and Medicaid)</b>	Items furnished in a patient's home under the care of physicians. These services are furnished under a plan established and periodically reviewed by a physician. They include part-time or intermittent skilled nursing care; physical, occupational, or speech therapy; medical social services; medical supplies and appliances (other than drugs and biologicals); home health aid services; and services of interns and residents.
<b>Hospice (Medicare and Medicaid)</b>	A public agency or private organization that is primarily engaged in providing pain relief, symptom management, and supportive services to patients that are certified to be terminally ill. Medicare beneficiaries may elect to receive hospice care instead of standard Medicare benefits for terminal illnesses.
<b>Household (LIHEAP)</b>	Any individual or group of individuals who are living together as one economic unit and for whom residential energy is customarily purchased in common, or who make designated payments for energy in the form of rent.
<b>Husband's benefit (OASDI)</b>	Monthly benefit payable to a husband or a divorced husband (aged 62 or older) of a retired or disabled worker. See <b>Spouse's benefit</b> .
<b>Independent laboratory services (Medicare)</b>	Diagnostic laboratory tests ordered by a physician and performed in a laboratory independent of a physician's office or a hospital.
<b>Inpatient hospital services (Medicare)</b>	Items and services furnished to an inpatient of a hospital by the hospital, including room and board, nursing and related services, diagnostic and therapeutic services, and medical or surgical services.

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<b>Institutionalization (Medicaid and SSI)</b>	Living arrangements for persons in public or private institutions when more than 50 percent of the cost of their care is met by the Medicaid program.
<b>Insured status (OASDI)</b>	The state of having sufficient quarters of coverage to meet the eligibility requirements for retired-worker or disabled-worker benefits or to permit the worker's spouse and children or survivors to establish eligibility for benefits in the event of his or her disability, retirement, or death. See "Insured Status" in the section Social Security (Old-Age, Survivors, and Disability Insurance).
<b>Interim assistance (SSI)</b>	Payments made by a state or local government to Supplemental Security Income applicants while their claims are being adjudicated. Repayment is made from the first SSI payment.
<b>Intermediary (Medicare)</b>	An organization, selected by providers of health care, that has an agreement with the Centers for Medicare & Medicaid Services to process and pay institutional claims and perform other functions under the program.
<b>Life expectancy</b>	The average number of years of life remaining at each tabulated birthday. See <b>Life table</b> (period).
<b>Life table (period)</b>	A period life table represents the mortality experience of an entire population during a relatively short period of time, usually 1–3 years. Such tables are useful for analyzing changes in the mortality experienced by a population through time. The table refers to a cohort of 100,000 people with the same birthday who experience the rate of mortality, or probability of death within 1 year, shown in the table, throughout their lives.
<b>Lifetime reserve (Medicare)</b>	Nonrenewable 60 days of inpatient hospital care to draw on if the 90 covered days per benefit period are exhausted. Patients are required to pay a daily coinsurance amount equal to one-half of the inpatient hospital deductible for each lifetime reserve day.
<b>Limitation of widow(er)'s benefit (OASDI)</b>	The reduction of the widow(er)'s benefit due to the early retirement of the deceased spouse. The benefit for a nondisabled widow(er) is limited to the larger of 82-1/2 percent of the deceased spouse's primary insurance amount, or the amount to which the deceased spouse would have been entitled if he or she were still alive. Thus, receipt of benefits by a worker before the normal retirement age will result in a reduction of benefits for a widow(er), even if the widow(er) became entitled after his or her own normal retirement age. Tables showing data on reduction for early retirement for nondisabled widows and widowers do not include those with limited benefits unless they became entitled before their own normal retirement age. See <b>Widow/widower's benefit</b> .
<b>Low-Income Home Energy Assistance Program (LIHEAP)</b>	Federal program to assist low-income households with heating and cooling costs.
<b>Low-income households (LIHEAP)</b>	Households with income under the greater of 150 percent of the poverty guideline for their state or 60 percent of the state median income, or households with members receiving Temporary Assistance for Needy Families, Supplemental Security Income, Food Stamps, or certain needs-tested veterans' benefits.
<b>Lump-sum death benefit (OASDI)</b>	A one-time payment, generally \$255, payable on the death of a fully or currently insured worker. The lump sum is payable to the surviving spouse of the worker, under most circumstances, or to the worker's children.
<b>Managed Care (Medicare)</b>	Includes Health Maintenance Organizations (HMOs), Competitive Medical Plans (CMPs), and other plans that provide health services on a prepayment basis which is either based on cost or risk depending on the type of contract they have with Medicare. See also <b>Medicare+Choice</b> .

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<b>Mandatory minimum state supplementation (SSI)</b>	Required by federal law for individuals converted to the Supplemental Security Income program from state assistance programs for the aged, blind, or disabled. This provision insures that monthly income will not be less than the amount received under the former state programs.
<b>Maximum family benefit (OASDI)</b>	The maximum monthly amount that can be paid on a worker's earnings record. Whenever the total of the individual monthly benefits payable to all the beneficiaries entitled on one earnings record exceeds the maximum, each dependents or survivors benefit is proportionately reduced to bring the total within the maximum. Benefits payable to divorced spouses or surviving divorced spouses are not reduced under the family maximum provision. See tables 2.A13, 2.A14, and 2.A17 for formulas for computing the family maximum.
<b>Maximum taxable (OASDI and Medicare)</b>	See <b>Annual maximum taxable limit</b> .
<b>Mean</b>	The arithmetic mean is calculated by dividing the sum of all of the values of a variable by the number of cases. The term "average" used in the statistical tables in this document refers to the arithmetic mean. See also <b>Median</b> .
<b>Median</b>	The median is a measure of central value which identifies that value that divides a distribution in half such that an equal number of cases fall below it as there are above it. See also <b>Mean</b> .
<b>Medicaid</b>	A federal-state program that provides medical assistance for certain individuals and families with low incomes and limited resources.
<b>Medical Savings Account—MSA (Medicare)</b>	A plan that provides benefits after a single high deductible is met. Medicare makes an annual deposit to the MSA and the beneficiary is expected to use that money to pay for medical expenses below the annual deductible. MSAs are currently a test program.
<b>Medically needy (Medicaid)</b>	Persons who would be eligible for Medicaid under one of the program's mandatory or optional groups, except that their income and/or resources are above the eligibility level set by their state. The states may extend eligibility to these otherwise qualified persons by allowing them to "spend down" to Medicaid eligibility by incurring medical and/or remedial care expenses to offset their excess income, thereby reducing it to a level below the maximum allowed by that state's Medicaid plan.
<b>Medicare</b>	A federally administered health insurance program that covers the cost of hospitalization, medical care, and some related services for most persons aged 65 or older. Also covers persons receiving Social Security Disability Insurance payments for 2 years, and persons with end-stage renal disease. Medicare consists of two separate but coordinated programs—Part A (Hospital Insurance, HI) and Part B (Supplementary Medical Insurance, SMI).
<b>Medicare+Choice</b>	An expanded set of options for the delivery of health care under Medicare established by the Balanced Budget Act of 1997. Most Medicare beneficiaries can choose to receive benefits through the original fee-for-service program or through one of the following Medicare+Choice plans: (1) coordinated care plans (such as health maintenance organizations, provider sponsored organizations, and preferred provider organizations); (2) Medical Savings Account (MSA)/Deductible plans (through a demonstration available to up to 390,000 beneficiaries); or (3) private fee-for-service plans.
<b>Medicare Economic Index</b>	An index that is often used in the calculation of the increases in the prevailing charge levels that help to determine allowed charges for physician services. In 1991 and later, this index is considered in connection with the update factor for the physician fee schedule.

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<b>Medigap (Medicare)</b>	A term used for private health insurance that pays, within limits, most of the health care service charges not covered by Part A (Hospital Insurance) or Part B (Supplementary Medical Insurance).
<b>Military wage credits (OASDI and Medicare)</b>	Credits recognizing that military personnel receive wages in kind (such as food and shelter) in addition to their basic pay and other cash payments. Noncontributory wage credits of \$160 are provided for each month of active military service from Sept. 16, 1940, through Dec. 31, 1956. For years after 1956, the basic pay of military personnel is covered under the Social Security program on a contributory basis. In addition to the contributory credits for basic pay, noncontributory wage credits of \$300 were granted for each calendar quarter from January 1957 through December 1977, in which a person received pay for military service. In years after 1977, noncontributory wage credits of \$100 are granted for each \$300 of military wages, up to a maximum annual credit of \$1,200.
<b>Minimum benefit (OASDI)</b>	The lowest benefit (before actuarial reduction) payable to a retired worker, a disabled worker, or a sole survivor of a deceased worker. The minimum benefit was eliminated for most workers who attain age 62, become disabled, or die after 1981.
<b>Monthly benefit amount (OASDI)</b>	<p>The amount payable after reduction, if necessary, for age, family maximum, and other reasons but before any deduction for SMI premiums. Effective June 1982, the final benefit payment is rounded to the next lowest \$1 (if not already a multiple of \$1) after reduction for age, family maximum, and other reasons and after any deduction for SMI premiums. The <i>Annual Statistical Supplement</i> tables with monthly benefits reflect the Monthly Benefit Credited (MBC). The amount is derived as follows:</p> <p>(1) subtract the SMI premium from the monthly benefit amount;  (2) round the above result down to the nearest whole dollar; and  (3) add back the SMI premium to the rounded result from 2 above.</p> <p>The result is the MBC.</p> <p>For example, if a monthly benefit amount is \$678.20, and an SMI premium of \$45.50 is deducted, the MBC is \$677.80 (calculated as follows: \$678.20 - \$45.50 = \$632.70 rounded down to \$632.00 + \$45.50 = \$677.50).</p>
<b>Mother's benefit (OASDI)</b>	A monthly benefit payable to a widow or surviving divorced mother if (1) the deceased worker on whose account the benefit is paid was either fully or currently insured at the time of his death and (2) the entitled child of the worker is in her care and is under age 16 or disabled.
<b>Nondisabled widow/widower's benefit (OASDI)</b>	See <b>Widow/widower's benefit</b> .
<b>Nonpayment status (OASDI)</b>	See <b>Withholding</b> .
<b>Normal retirement age (OASI)</b>	See <b>Full retirement age</b> .
<b>Old-age benefit (OASI)</b>	See <b>Retired-worker benefit</b> .
<b>Old-Age, Survivors, and Disability Insurance (OASDI)</b>	<p>The Social Security programs which pays monthly cash benefits to:</p> <p>(1) retired worker (old-age) beneficiaries and their spouses and children and to survivors of deceased insured workers (OASI), and  (2) disabled-worker beneficiaries and their spouses and children and for providing rehabilitation services to the disabled (DI).</p>
<b>Optional state supplementation (SSI)</b>	May be provided by states to bring the combined Supplemental Security Income-state payment to an amount more nearly commensurate with their costs of living than is the SSI payment alone.
<b>Outpatient services (Medicare)</b>	Services furnished to outpatients by a participating hospital for diagnosis or treatment of an illness or injury.



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<b>Own household (SSI)</b>	A definition used to determine the federal benefit rates. Applies to adults who own their living quarters; are liable for the rent; pay their pro rata shares of household expenses; are living in households composed only of recipients of public income-maintenance payments; are placed by agencies in private households; and children living in their parent's household. See <b>Federal benefit rates</b> .
<b>Parent's benefit (OASDI)</b>	Monthly benefit payable to a dependent parent aged 62 or older of a deceased fully insured worker.
<b>Payment status (OASDI)</b>	The state or condition of a benefit with respect to actual receipt by the beneficiary—that is, whether the benefit is in current-payment status or withheld.
<b>Peer Review Organization-PRO (Medicare)</b>	A group of practicing physicians and other health care professionals, paid by the federal government, to review the care given to Medicare patients.
<b>Period of disability (DI)</b>	A continuous period of at least 5 months during which a worker has no earnings (or low earnings) because of disability. This period of disability is not counted when determining the worker's insured status and the monthly benefit amount payable to the worker and his or her family. The period of disability can also preserve the family's rights to benefits in another way: the beginning date of the period of disability is a point for determining dependency of a child and a parent.
<b>Physician services (Medicare)</b>	Services provided by an individual licensed under state law to practice medicine or osteopathy. Services by hospital bills are not included.
<b>Preferred Provider Organization (Medicare)</b>	An arrangement between a provider network and a health insurance or a self-insured employer. Providers generally accept payments less than traditional Fee for Service payments in return for a potentially greater share of the patient market. PPO enrollees are not required to use the preferred providers, but are given financial incentives to do so, such as reduced coinsurance and deductibles. Providers do not accept financial risk for the management of care.
<b>Presumptive disability or blindness (SSI)</b>	For certain diagnoses, where there is high probability of a favorable medical determination of disability or blindness, payments may be made for up to 6 months before the formal determination if the applicant meets the other eligibility qualifications.
<b>Primary insurance amount—PIA (OASDI)</b>	The monthly amount payable to a retired worker who begins to receive benefits at normal retirement age or to a disabled worker who has never received a retirement benefit reduced for age. This amount, which is related to the worker's average monthly wage or average indexed monthly earnings, is also the amount used as a base for computing all types of benefits payable on the basis of one individual's earnings record.
<b>Primary insurance amount formula (OASDI)</b>	The mathematical formula relating the PIA (Primary Insurance Amount) to the AIME (Average Indexed Monthly Earnings) for workers who attain age 62, become disabled, or die after 1978. The PIA is equal to the sum of 90 percent of AIME up to the first bend point, plus 32 percent of AIME above the first bend point up to the second bend point, plus 15 percent of AIME in excess of the second bend point. Automatic benefit increases are applied beginning with the year of eligibility.
<b>Prospective Payment System (Medicare)</b>	A method of reimbursement for hospitals which was implemented effective with hospital cost reporting periods beginning on or after Oct. 1, 1983. Under this system, Medicare payment is made at a predetermined, specific rate for each discharge. All discharges are classified according to a list of diagnosis-related groups (DRGs).
<b>Prouty benefit (OASI)</b>	See <b>Special age-72 benefit</b> .
<b>Provider (Medicare and Medicaid)</b>	Medicare—A provider is a facility, supplier, or physician who furnishes medical services.

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	Medicaid—A provider is a person, group, or agency who provides covered services to enrollees.
<b>Qualified Medicare Beneficiaries (Medicare and Medicaid)</b>	QMBs are persons with incomes at or below 100 percent of the federal poverty level and resources at or below 200 percent of the SSI limit. Medicaid pays the HI and SMI premiums and the Medicare coinsurance and deductibles, subject to limits that states may impose on payment rates.
<b>Quarters of coverage (OASDI and Medicare)</b>	The crediting of coverage needed for insured status. A worker receives 1 quarter of coverage (up to a total of 4) for a designated amount of annual earnings reported from employment or self-employment. This dollar amount is subject to annual automatic increases in proportion to increases in average earnings. For amounts in years 1939 to present, see table 2.A7. No more than 4 quarters of coverage may be credited for any calendar year, and no quarter of coverage is credited after the quarter in which death occurred or for a quarter entirely included in a period of disability.
<b>Railroad Retirement</b>	A federal insurance program designed for workers in the railroad industry. The provisions of the Railroad Retirement Act provide for a system of coordination and financial interchange between the Railroad Retirement program and the Social Security program.
<b>Reasonable cost (Medicare)</b>	Intermediaries and carriers use the Centers for Medicare & Medicaid Services guidelines to determine reasonable costs incurred by providers in furnishing covered services to enrollees. Reasonable cost is based on the actual cost of providing such services, including direct and indirect costs of providers and excluding any costs that are unnecessary in the efficient delivery of services covered by the Hospital Insurance program.
<b>Redetermination (SSI)</b>	The periodic review of eligibility for each Supplemental Security Income recipient to ensure that eligibility continues and that payments are in the proper amount.
<b>Reduction for early retirement (OASDI)</b>	See <b>Actuarial reduction</b> .
<b>Representative payee (OASDI and SSI)</b>	A person designated by the Social Security Administration to receive monthly benefits on behalf of a beneficiary when such action appears to be in the beneficiary's best interest. A representative payee is appointed for an adult beneficiary when the beneficiary is physically or mentally incapable of managing his or her own funds. In addition, a payee is usually appointed to receive benefits on behalf of a child under age 18.
<b>Retired-worker (old-age) benefit (OASI)</b>	Monthly benefit payable to a fully insured retired worker aged 62 or older, or to a person entitled under the transitionally insured status provision in the law. Retired-worker benefit data do not include special age-72 benefits, unless indicated.
<b>Retirement age (OASI)</b>	The age at which an individual establishes entitlement to retirement benefits. See <b>Full retirement age</b> .
<b>Retirement earnings test (OASDI)</b>	See <b>Earnings test</b> .
<b>Secondary benefit (OASDI)</b>	Monthly benefit payable to a spouse or child of a retired or disabled worker, or to a survivor of a deceased worker.
<b>Section 1619(a) (SSI)</b>	See <b>Special cash payments</b> .
<b>Section 1619(b) (SSI)</b>	See <b>Special recipient status</b> .
<b>Self-employed (OASDI and HI)</b>	One who derives income from the operation of a partnership or nonincorporated trade or business.

<b>Skilled nursing facility (Medicare)</b>	An institution that has a transfer agreement with one or more participating hospitals, is primarily engaged in providing skilled nursing care and rehabilitative services to inpatients, and meets specific regulatory certification requirements.
<b>Social Security number (OASDI and HI)</b>	A nine-digit number used to identify the record of earnings an individual has in employment or self-employment covered by Social Security.
<b>Social Security Act</b>	Public Law 74-271, enacted August 14, 1935, with subsequent amendments. The Social Security Act consists of 20 titles, of which four have been repealed.
<b>Special age-72 benefit (OASI)</b>	Monthly benefit payable to men who attained age 72 before 1972 and to women who attained age 72 before 1970 and who do not have sufficient quarters of coverage to qualify for a retired-worker benefit under either the fully or the transitionally insured status provisions. (Also known as Prouty benefits.)
<b>Special cash payments (SSI)</b>	Continuing cash benefits for disabled individuals whose gross earned income is at the amount designated as the substantial gainful activity level. The person must continue to be disabled and meet all other eligibility rules.
<b>Special minimum PIA (OASDI)</b>	An alternative Primary Insurance Amount based on the worker's length (years) of covered employment. It is designed to help those who worked in covered employment for many years but had low earnings. See table 2.A12 for computation of the special minimum PIA.
<b>Special recipient status (SSI)</b>	For Medicaid purposes, provides special status to working disabled or blind individuals when their earnings make them ineligible for cash payments.
<b>Specified Low-Income Medicare Beneficiaries (Medicare and Medicaid)</b>	SLMBs are persons who meet all Qualified Medicare Beneficiary requirements except that their incomes are slightly higher, though less than 120 percent of the federal poverty level. Medicaid pays their Part B (Supplementary Medical Insurance) premium.
<b>Spell of illness (Medicare)</b>	A period of consecutive days beginning with the first day on which a beneficiary is furnished inpatient hospital or extended care services and ending with the close of the first period of 60 consecutive days thereafter in which the beneficiary is in neither a hospital or skilled nursing facility.
<b>Spouse's benefit (OASDI)</b>	<p>Monthly benefit payable to a spouse or a divorced spouse of a retired or disabled worker under one of the following conditions:</p> <ol style="list-style-type: none"> <li>(1) the spouse is aged 62 or older or has an entitled child of the worker in his or her care who is under age 16 or is disabled; or</li> <li>(2) the divorced spouse is aged 62 or older and was married to the worker for 10 years before the divorce became final. Effective with benefits payable after December 1984, a divorced spouse of an eligible worker can be entitled to benefits if he or she meets the requirements for entitlement and has been divorced for at least 2 years, regardless of whether the worker has filed for benefits or has benefits withheld due to the earnings test. Effective with benefits payable beginning January 1991, the 2-year period is waived if the worker was entitled to benefits before the divorce. The earnings test will continue to apply to the divorced spouse's own earnings; or</li> <li>(3) effective with benefits payable beginning January 1991, a deemed spouse (including a divorced deemed) spouse, regardless of whether the legal spouse is entitled to benefits on the same earnings record. A deemed spouse is a person who entered into an invalid ceremonial marriage in good faith.</li> </ol>
<b>State-administered supplementation (SSI)</b>	See <b>State supplementation</b> .
<b>State supplementation (SSI)</b>	Payments to eligible persons made under state provisions. These payments may vary by the recipient's living situation and by geographic area within the state. The payments are federally and state-administered.

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<b>Student's benefit (OASDI)</b>	Child's benefit payable to a full-time unmarried elementary or secondary school student aged 18–19. Student's benefits end at age 19 or at the end of the current semester or quarter, whichever is later.
<b>Substantial gainful activity (DI and SSI)</b>	Remunerative work that is substantial, as determined from considering the amount of money earned, and/or the number of hours worked, and the nature of the work. See table 2.A30 for money amounts.
<b>Supplemental Security Income (SSI)</b>	Program for the needy aged, blind, and disabled. Replaced the former federal-state programs of Old-Age Assistance, Aid to the Blind, and Aid to the Permanently and Totally Disabled.
<b>Surviving divorced father's benefit (OASI)</b>	See <b>Father's benefit</b> .
<b>Surviving divorced mother's benefit (OASI)</b>	See <b>Mother's benefit</b> .
<b>Surviving divorced spouse's benefit (OASI)</b>	See <b>Widow/widower's benefit</b> .
<b>Survivors benefit (OASI)</b>	Benefit payable to a survivor of a deceased insured worker.
<b>Suspended benefit (OASDI)</b>	A benefit not in current-payment status.
<b>Taxable earnings (OASDI and Medicare)</b>	Wages and/or self-employment income that is under the applicable annual maximum taxable limit.
<b>Taxable maximum (OASDI and Medicare)</b>	See <b>Annual maximum taxable limit</b> .
<b>Taxable self-employment income (OASDI and Medicare)</b>	The maximum amount of net earnings from self-employment by an earner which, when added to any taxable wages, does not exceed the contribution and benefit base. For Hospital Insurance beginning in 1994, all net earnings from self-employment.
<b>Taxable wages (OASDI and Medicare)</b>	See <b>Taxable earnings</b> .
<b>Taxes (OASDI and HI)</b>	See <b>Contributions</b> .
<b>Temporary Assistance for Needy Families</b>	Created by the Personal Responsibility and Work Opportunities Reconciliation Act of 1996, TANF provides assistance and work opportunities to needy families. Replaced Aid to Families with Dependent Children (AFDC), Emergency Assistance, and Job Opportunities and Basic Skills Training (JOBS) programs.
<b>Temporary Disability Insurance</b>	TDI, sometimes called cash sickness benefits, provides workers with partial compensation for loss of wages caused by temporary nonoccupational disability. Only five states, Puerto Rico, and the railroad industry have TDI laws.
<b>Termination (OASDI)</b>	Cessation of payment of a specific type of benefit because the beneficiary is no longer entitled to receive it. For example, benefits might terminate as a result of the death of the beneficiary, the recovery of a disabled beneficiary, or the attainment of age 18 by a child beneficiary. In some cases, the individual may become immediately entitled to another type of benefit (such as the conversion of a disabled-worker beneficiary at normal retirement age to a retired-worker beneficiary).
<b>Totalization (OASDI)</b>	International agreements that coordinate the U.S. social security programs with the social security programs of other countries are called "totalization agreements." These agreements have two purposes: (1) To eliminate dual social security coverage and taxation, the situation that occurs when a person from one country works in the other country and is required to pay social security taxes to both countries for the same work; and (2) To avoid situations in which workers having at least 6 U.S. quarters of coverage, lose benefit rights because they have

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	divided their careers between two countries. Under an agreement, such workers may qualify for partial U. S. or foreign benefits based on combined work credits from both countries. See "International Agreements" in the section Social Security (Old-Age, Survivors, and Disability Insurance).
<b>Thrifty Food Plan (Food Stamp Program)</b>	A low-cost model diet plan based on the National Academy of Sciences' Recommended Dietary Allowances. Households are issued a monthly allotment of food stamps based on the Thrifty Food Plan.
<b>Trial work period (DI)</b>	Persons receiving Social Security disability benefits are generally entitled to a 9-month trial work period (TWP) during which monthly benefits continue. If the beneficiary's disability has ended after completion of the TWP, monthly benefits are continued for an additional 3 months and then entitlement is terminated. Effective January 1992, a disabled beneficiary would exhaust the TWP only if services were performed in any 9 months within a period of 60 consecutive months.
<b>Trust fund (OASDI and Medicare)</b>	<p>Four separate accounts in the U.S. Treasury in which are deposited the equivalent of taxes received under the Federal Insurance Contributions Act, the Self-Employment Contributions Act, contributions dealing with coverage of state and local government employees, any sums received under the financial interchange with the railroad retirement account, voluntary hospital and medical insurance premiums, and transfers of federal general revenues. Funds not withdrawn for current monthly or service benefits, the financial interchange, and administrative expenses are invested in interest-bearing federal securities, as required by law. The interest earned is also deposited in the trust funds.</p> <ul style="list-style-type: none"> <li>• Old-Age and Survivors Insurance (OASI). The trust fund used for paying monthly benefits to retired-worker (old-age) beneficiaries and their spouses and children and to survivors of insured workers.</li> <li>• Disability Insurance (DI). The trust fund used for paying monthly benefits to disabled-worker beneficiaries and their spouses and children and for providing rehabilitation services to the disabled.</li> <li>• Hospital Insurance (HI). The trust fund used for paying part of the costs of inpatient hospital services and related post-hospital care for aged and disabled individuals who meet the eligibility requirements.</li> <li>• Supplementary Medical Insurance (SMI). The trust fund used for paying part of the costs of physicians' services, outpatient hospital services, and other related medical and health services for voluntarily insured aged and disabled individuals.</li> </ul>
<b>Unemployment Insurance</b>	A federal-state coordinated program that provides partial income replacement to regularly employed members of the labor force who become involuntarily unemployed. All 50 states, the District of Columbia, Puerto Rico, and the Virgin Islands have unemployment insurance programs.
<b>Veterans' benefits</b>	A variety of benefits and services to veterans and their dependents and survivors that include, but are not limited to disability compensation, benefits for survivors, health care benefits, and educational assistance and training.
<b>Widowed father's benefit (OASI)</b>	See <b>Father's benefit</b> .
<b>Widowed mother's benefit (OASI)</b>	See <b>Mother's benefit</b> .
<b>Widow/widower's benefit (OASDI)</b>	Monthly benefit payable to a widow(er) or surviving divorced widow(er) of a worker fully insured at the time of death, if he or she is (1) aged 60 or older or (2) aged 50–59 and has been disabled throughout a waiting period of 5 consecutive calendar months that began no later than 7 years after the month in which the

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worker died or after the end of his or her entitlement to benefits as a widowed mother or father.

A surviving divorced widow(er)'s marriage to a worker must have lasted 10 years before the divorce became final. Effective for benefits payable after December 1983, benefits are continued for disabled widow(er)s and surviving divorced widow(er)'s who remarry after the age of first eligibility for benefits.

Effective January 1991, benefits may be payable to a deemed widow(er), including a divorced deemed widow(er). A deemed widow(er) is a person who entered into an invalid ceremonial marriage in good faith.

**Wife's benefit (OASDI)**

A monthly benefit payable to a wife or divorced wife of a retired or disabled worker. See **Spouse's benefit**.

**Windfall Elimination  
Provision—WEP (OASI and  
DI)**

A modified benefit formula for determining the primary insurance amount, which estimates the windfall in benefits for individuals who have only minimal Social Security coverage and will receive a pension based on years of work in noncovered employment. The change was phased in for workers eligible for retirement or Disability Insurance benefits and for a pension from noncovered employment beginning in 1986; became fully effective in 1990. See table 2.A11.1

**Withholding (OASDI)**

Suspension of benefit payments until the condition(s) causing deductions are known to have ended. The suspension does not affect eligibility for Hospital Insurance benefits.

**Worker (OASDI)**

A person who has earnings creditable for Social Security purposes on the basis of services for wages in covered employment or on the basis of income from covered self-employment. Data on covered self-employment exclude self-employed persons who had no self-employment income taxable or creditable under Social Security because they had wages or salaries reaching the annual taxable maximum reported for the same year.

**Workers' compensation and  
public disability benefit offset  
(DI)**

A requirement that reduces the benefits to a disabled worker and dependents if the worker also receives workers' compensation (WC) or other public disability benefits (PDB). The reduction continues until the month the worker reaches age 65 or the month the WC/PDB payments stop, whichever comes first.

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## Index to Tables

### A

Accuracy rates (OASDI and SSI), 2F7

Actuarial reduction (OASDI) (see Reduction for early retirement (OASDI))

Administrative data, 2F1–2F11

Administrative expenses  
Disability Insurance Trust Fund, 4A2, 4A3  
Hospital Insurance Trust Fund, 8A1  
Old-Age and Survivors Insurance Trust Fund, 4A1, 4A3  
Supplementary Medical Insurance Trust Fund, 8A2

Administrative Law Judges (OASDI), workloads of, 2F8

Adult beneficiaries (OASDI), 5A16, 5L1

Age (OASDI), 3C5, 3C6 (see also specific types of OASDI benefits including: Children; Disabled widows and widowers; Disabled workers; Retired workers; Widowed mothers and fathers; Widows and widowers, nondisabled; Wives and husbands)  
awards, 6A3–6A5, 6B1, 6B5, 6C2, 6C3, 6D3, 6D5, 6D7  
benefit types and amounts, 5A16  
Black Lung benefits, 9D3  
centenarians, 5J5  
Hispanic origin, 3C8  
income, 3E3, 3E6  
life table, 4C6  
race, 3C7, 5A1, 5A3  
sex, 3C8, 5A1, 5A3, 5A10, 5A16  
state data, 5J3, 5J5  
summary data, 5A1, 5A5, 5A10, 5A15, 5A16

Age (SSI) (see Supplemental Security Income)

Aged (SSI) (see Supplemental Security Income)

Agricultural employees (OASDI), 2A1

Aid to Families with Dependent Children (AFDC), 9G1, 9G2

Aliens (SSI) (see Noncitizens (SSI))

Allowances (OASDI and SSI), 2F7

Appeals Council cases reviews (OASDI), 2F11

Applications (OASDI), 6C7

Automatic adjustment provisions (OASDI), 2A18

Average annual wage (OASDI), 2A8

Average indexed monthly earnings (OASDI), 2A10, 2A11, 2A18

Average monthly wage (OASDI), 2A10, 2A15–2A17, 2A20

Awards (OASDI)  
age, 6A3–6A5, 6B1, 6B5, 6C2, 6C3, 6D3, 6D5, 6D7  
applications, 6C7  
children, 6A1, 6A3, 6D4, 6D5  
conversion, 6A4  
diagnostic group, 6C3  
disabled workers, 6A1–6A6, 6C1–6C3, 6C7  
initial, 6B1  
lump-sum, 4A5, 6D9  
primary insurance amount, 6A2  
race, 6A3  
retired workers, 6A1–6A6, 6B1, 6B3–6B5  
sex, 6A2, 6A3  
state data, 6A6  
summary data, 6A1–6A5  
widowed mothers and fathers, 6A1, 6A3, 6D6, 6D7  
widows and widowers, 6A1–6A3, 6A5, 6D7, 6D8  
wives, 6A3  
wives and husbands, 6A1, 6A5, 6D1, 6D3

Awards (SSI)  
adults, 7A8, 7B9, 7E2  
age, 7A8, 7B9, 7E2  
aged, 7A8, 7B9, 7E2  
blind, 7A8, 7B9, 7E2  
blind and disabled children, 7E2  
disabled, 7A8, 7B9, 7E2  
sex, 7E2  
state data, 7B9

### B

Bend points in benefit formula (OASDI), 2A11, 2A13, 2A18

Beneficiaries and payments, currently payable (OASDI)  
age, 5A1, 5A3, 5A6, 5A10, 5A15, 5A16  
assets, 3E3  
concurrent, OASDI and SSI, 3C5, 3C6, 3C6.1  
earnings, 3E3  
foreign countries, 5J11  
Hispanic origin, 3C8  
income, 3E3, 3E6, 3E8  
sources, 3E3  
international agreements, eligibility based on, 5M1  
living arrangements, 3E3, 3E6  
race, 3C7, 5A1, 5A3, 5A6, 5A7  
representative payment, 5L1  
sex, 3C8, 5A1, 5A3, 5A7, 5A10, 5A14–5A16  
state data, 5J1–5J6, 5J8–5J10, 5J12–5J14  
summary data, 3C6.1, 3C7, 3C8, 5A1, 5A3–5A8, 5A10  
type of benefit (see Children (OASDI); Disabled widows and widowers; Disabled workers; Parents; Retired workers; Special age-72 beneficiaries; Widowed mothers and fathers; Widows and widowers, nondisabled; Wives and husbands)

Benefit computations, (OASDI), 2A8–2A18

Benefit rates (SSI), 2B1

Benefit types and levels (OASDI), qualifications and legal criteria for

beneficiary families, 2A26  
children, 2A21, 2A22  
disabled workers, 2A20  
divorced beneficiaries, 2A21, 2A22  
illustrative monthly benefits, 2A26  
lump sum awards, 2A25  
maximum and minimum, 2A27, 2A28  
parents, 2A22  
PIA, percent of, 2A20–2A22  
retired workers, 2A20, 2A27, 2A28  
special age-72 beneficiaries, 2A24  
survivors, 2A22, 2A23, 2A26  
transitionally insured, 2A23  
vocational rehabilitation services, 2A25  
widowed mothers and fathers (OASDI), 2A22  
widows and widowers, 2A22–2A24  
wives and husbands, 2A21–2A24

Black Lung

benefits, 9D1–9D3  
civil litigation, 2F10  
hearing receipts, dispositions, claims pending, 2F9

Blind (SSI) (see Supplemental Security Income)

## C

Centenarians (OASDI), 5J5

Children (AFDC) (see Aid to Families with Dependent Children)

Children (OASDI)

age, 5A1, 5A5, 5A10, 6D5  
awards, 6A1, 6A3, 6D4, 6D5  
beneficiary families, 5H1–5H4  
benefit distributions, 5H3, 5H4  
benefits paid  
annual, 4A5, 4A6  
monthly, 5A4, 5A16, 5A17, 5F4, 5J4, 5J14  
benefits withheld, 6E4, 6E5  
disabled aged 18 or older, 3C6.1, 5A1, 5A10, 5A16, 5A17, 5C2, 5D4.1, 5E2, 5F4, 5F6, 5J14, 6D4  
foreign countries, 5J11  
of deceased workers, 5A1, 5F4, 5F6, 5F7, 6D4  
of disabled workers, 5A1, 5E1, 5E2, 5F4, 6D4  
of retired workers, 5A1, 5C1, 5C2, 5F4, 6D4  
primary insurance amount, 5C1, 5E1, 5F7, 5H2  
special minimum, 5A8  
qualifications for benefits, 2A21, 2A22  
race, 5A1, 5A6, 6A3  
sex, 5A16  
state data, 5J2, 5J4, 5J10, 5J14  
students, aged 18–19, 5A1, 5C2, 5E2, 5F4, 5F6, 6D4  
terminations, 6F1–6F3  
under age 18, 5A1, 5C2, 5E2, 5F4, 5F6, 6D4  
Children, blind or disabled (SSI) (see Supplemental Security Income)

Civil litigation (OASDI and SSI), 2F10

Civil Service (see Government workers)

Claims workloads (OASDI and SSI), 2F4–2F6

Clergy (see Religious personnel)

Clinical Laboratory Improvement Act (CLIA) facilities (see Medicare)

Computations, benefit (OASDI), 2A10–2A18

Concurrent beneficiaries (OASDI and SSI), 2F9, 2F10, 3C5, 3C6, 3C6.1, 7D1, 7D2

Constant dollars (AFDC, OASDI, and SSI benefits), 3C4

Consumer Price Index (CPI), 2A18, 3C4, 3E1

Continuation of Medicaid coverage (1619b) (SSI), 7F3–7F5

Contribution rates (OASDI), 2A3, 2A5

Contributions (OASDI), 2A4, 4B10–4B12

Cost-of-living adjustments (OASDI and SSI), 2A11, 2A13, 2A14, 2A18, 2A19, 2B1

Covered workers (OASDI)

age, 4B5, 4B6, 4B8  
categories of, 2A1  
coverage election or waiver, 2A1  
legislation affecting, 2A1  
median earnings, 4B3, 4B6  
new entrants, 4B1  
OASDHI contributions, 4B10–4B12  
self-employed, 2A1, 4B2–4B4, 4B8–4B12  
sex, 4B3–4B9  
Social Security numbers issued, 4B1  
state data, 4B10, 4B12  
taxable earnings, amount reported, 4B1–4B3, 4B5, 4B10–4B12  
wage and salary, 4B2, 4B3, 4B7, 4B10–4B12  
with earnings above maximum taxable, 4B7, 4B9  
with earnings below maximum taxable, 4B4, 4B7, 4B9

Creditable earnings (OASDI) (see Taxable earnings (OASDI))

## D

Death probability, 4C6

Delayed retirement credit (OASDI), 2A20, 2A22, 5B1–5B3

Denials (see Service delivery (OASDI and SSI))

Dependents and survivors (OASDI), 5F1–5F13

Diagnoses (OASDI), 5D4.1, 5D5, 5D6, 5J12, 5J13, 6C3

Diagnoses (SSI), 7F1, 7F2

Direct deposit (OASDI), 5K1



Disability, definition of (OASDI), 2A7	Divorced beneficiaries (OASDI), 2A21, 2A22, 5A1, 5F12, 6D3, 6D6, 6D7
Disability determinations (see Service delivery (OASDI and SSI))	Domestic employees (OASDI), 2A1
Disability Insurance (OASDI), 2F5, 2F9, 2F10	Dual entitlement (OASDI), 5A14, 5A15, 5G1–5G5
Disability Insurance Trust Fund (OASDI) (see Trust Funds)	<b>E</b>
Disabled adult children (see Children (OASDI), disabled, aged 18 or older)	Early retirement (OASDI) (see Reduction for early retirement (OASDI))
Disabled beneficiaries (OASDI), 5A1, 5A16, 5A17, 5J14 (see also Children (OASDI); Disabled widows and widowers; Disabled workers)	Earnings of covered workers (OASDI) (see also Taxable earnings (OASDI)) amount of, 4B1–4B3, 4B7, 4B9, 4B10, 4B12 below annual maximum taxable amount, 4B4, 4B7, 4B9 median, by age and sex of worker, 4B3, 4B6 self-employed workers, 4B2–4B4, 4B9–4B12 state data, 4B10, 4B12 wage and salary workers, 4B2, 4B3, 4B7, 4B10–4B12
Disabled children (OASDI) (see Children (OASDI), disabled, aged 18 or older)	Earnings test (OASDI) amount permitted without reduction in benefits, 2A29 automatic adjustment of, 2A18 beneficiaries affected, 6B1, 6E4, 6E5
Disabled (SSI) (see Supplemental Security Income)	Education private, social welfare expenditures, 3A4 public, social welfare expenditures, 3A1, 3A3
Disabled widows and widowers (OASDI) age, 5A1, 5A5, 5A16, 6A3, 6D7 awards, 6A3, 6D7, 6D8 beneficiary families, 5H2, 5H4 benefit distributions, 5H4 benefits paid, monthly, 3C6.1, 5A16, 5A17, 5F8, 5J14 diagnostic group, 5D4.1 primary insurance amount, 5F7, 5H2 special minimum, 5A8 race, 5A1, 5A7, 6A3 sex, 5A1, 5A7, 5A16, 5F6, 6A3, 6D8 state data, 5J14 surviving divorced, 5A1 year of entitlement, 5F10	Emergency assistance, 9G1, 9G2
Disabled workers (OASDI) age, 5A1, 5A3, 5A5, 5A10, 5A16, 5D4, 5D6, 6A3, 6A4, 6C2, 6C3 applications, 6C7 awards, 6A1–6A5, 6C1–6C3, 6C7 beneficiary families, 5H1–5H3 benefit distributions, 5D2, 5H3, 5J8, 6C1 benefits paid annual, 4A6 monthly, 3C6.1, 5A4, 5A16, 5A17, 5D3, 5J4, 5J14, 6A6 benefits withheld, 6E4, 6E5 diagnostic group, 5D4.1, 5D5, 5D6, 5J12, 5J13, 6C3 foreign countries, 5J11 primary insurance amount, 5E1, 5H2, 6A2 special minimum, 5A8 qualifications for benefits, 2A20 race, 5A1, 5A3, 5A6, 5A7, 6A3 sex, 5A1, 5A3, 5A7, 5A10, 5A16, 5D3, 5D5, 5E2, 6A2–6A4, 6C3 state data, 5J2, 5J4, 5J8, 5J12–5J14, 6A6 terminations, 6F1, 6F2 with reduction for early retirement, 5A3, 6A5 year of entitlement, 5D1	Employees (OASDI) (see Offices and staff (OASDI))
	End stage renal disease (Medicare), 8B5, 8C3
	Energy Assistance (see Low-Income Home Energy Assistance Program)
	Entitlement year (OASDI), 5B4, 5D1, 5F9, 5F10
	Excess payments (see Service delivery (OASDI and SSI))
	Expectation of life, 4C6
	<b>F</b>
	Fair Labor Standards Act, 3B3
	Families, beneficiary (OASDI), 2A26, 3E6, 5H1–5H4
	Family maximum benefit (OASDI), 2A13, 2A14, 2A17, 2A26
	Fathers (see Widowed mothers and fathers (OASDI))
	Federal employees (see Government workers) FICA taxes (see Contribution rates (OASDI))
	Financing (OASDI), 2A3–2A6
	Food Stamps, 3A3, 9H1

---

Foreign countries (OASDI), 5J1–5J11, 5K1, 5M1

## G

General revenue appropriations (OASDI), 2A6

Government pension offset (OASDI), 2A22, 2A23, 6E4, 6E5

Government workers, 2A1, 3C3

Gross domestic product (GDP), 3A1, 3A3, 3A4

## H

Health and medical programs, expenditures for, 3A1, 3A3, 3A4  
(see also Medicaid; Medicare)

Health insurance for the aged and disabled (see Medicare)

Hearing receipts, dispositions, claims pending (OASDI and SSI),  
2F9

Hearings and appeals (OASDI), 2F1, 2F8–2F11

Hispanic origin, 3C8

Historical data

administrative data, 2F3,2F7

Aid to Families with Dependent Children (AFDC), 9G1

Black Lung benefits, 9D1

Emergency assistance, 9G1

employment and earnings, 3B3

Food Stamps, 9H1

interprogram data, 3C3–3C5,3C6.1

LIHEAP, 9J1.1, 9J2.1, 9J3.1

Medicaid recipients, 8E1,8E2

Medicare

cost sharing and premium amounts, 2C1

enrollment, utilization and reimbursement, 8B1–8B5, 8B8–  
8B12

participating facilities, 8C1

trust funds, 8A1,8A2

poverty data, 3E1,3E2,3E8

Social Security Acts, 2A1,2A2,2A6,2A7,2A10–2A18, 2A20–  
2A25,2A29,2A31,2B1

Social Security program (OASDI)

awards, 6A1,6A2,6B5,6C2,6C7,6D1,6D4,6D6,6D8,6D9

benefit increases, cumulative effects of, 2A19

coverage, financing, and insured status, 2A3,2A4

covered workers, 4B1–4B9,4B11

current-pay benefits

benefit families, 5H1

dependents and survivors, 5F1,5F4,5F6,5F8,5F12

disabled workers, 5D3,5D4,5E2

dual entitlement, 5G2

international agreements, 5M1

retired workers, 5B5,5B8,5C2

summary data, 5A4,5A14,5A17

earnings guidelines and SGA, 2A30

indexed earnings, 2A8,2A9

insured workers, 4C1,4C2,4C5

retired worker benefits, minimum and maximum, 2A27,2A28  
terminations, 6F1

Trust Funds, 4A1–4A6

Supplemental Security Income (SSI)

1619a and 1619b, 7F3

noncitizens receiving, 7E6

summary data, 7A3–7A5,7A9

Veterans benefits, 9F1

Workers' compensation, 9B1

Home health agencies (Medicare), participating facilities, 8C1,  
8C3

Home health services

Medicaid, 8E1

Medicare, 8B1, 8B2, 8B9

Hospital Insurance (HI) (see Medicare)

Hospital Insurance Trust Fund (Medicare) (see Trust Funds)

Hospitals, expenditures for care

Medicaid, 8E1

Medicare, 8B1, 8B2, 8B8

Hospitals (Medicare), type of participating facility, 8C1, 8C2

Housing, social welfare expenditures for, 3A1, 3A3

Husbands (OASDI) (see Wives and husbands (OASDI))

## I

Illustrative monthly benefits (OASDI), 2A26

Income

age, 3E3, 3E6

family, 3E3, 3E6, 3E8

personal, 4A4

poverty guidelines, 3E8

poverty thresholds, 3E1

race, 3E6

shares, 3E3, 3E6

sources, 3E3

Income tax treatment of OASDI benefits (OASDI), 2A31, 2A32,  
3C3, 4A1–4A3

Independent laboratories (Medicare), participating, 8B9, 8C1, 8C3

Indexing factors and indexed earnings (OASDI), 2A8, 2A9

Insured status provisions (OASDI), 2A7

Insured workers (OASDI)

age, 4C2, 4C5

fully insured, 4C1, 4C2, 4C5

insured for disability, 4C1, 4C2

monthly benefits for survivors of, 2A22

percent of population, 4C5

permanently insured, 4C1

sex, 4C2, 4C5

Interfund borrowing, 2A6

Intermediate-care facilities for the mentally retarded (Medicaid), 8E1

International agreements (OASDI), 5M1

**K**

Kidney disease (see End stage renal disease (Medicare))

**L**

Life expectancy, 4C6

Life insurance and death benefits, 3A4

Life table, 4C6

Litigation, civil (see Civil litigation (OASDI and SSI))

Living arrangements  
aged population, 3E3, 3E4, 3E6  
SSI recipients, 2B1, 7E5

Long-term disability benefits, 3A4

Low-Income Home Energy Assistance Program (LIHEAP), 9J1–9J3.1

Lump-sum awards (OASDI), 2A25, 4A5, 6D9

**M**

Maximum benefit (OASDI), 2A13, 2A14, 2A17, 2A26–2A28

Maximum indexed earnings (OASDI), 2A9

Medicaid, 2C2, 3A3, 8E1, 8E2, 8H1  
continuation of coverage (1619b), 7F3–7F5

Medicare  
aged enrollees, 2C1, 8B1, 8B3, 8B4, 8B9, 8B11  
amounts reimbursed, 8B1, 8B2, 8B9  
assignment rates, 8B10  
bills approved, 8B9–8B11  
buy-ins, 8B12  
charges, 8B9  
claims, 8B9–8B11  
Clinical Laboratory Improvement Act (CLIA) facilities, 8C1, 8C3  
coinsurance, 2C1  
contributions, 4B12  
cost-sharing, 2C1  
deductibles, 2C1  
disabled enrollees, 2C1, 8B2, 8B3, 8B5, 8B9, 8B11  
earnings of workers, 4B12  
end stage renal disease facilities, 8B5, 8C3  
enrollment, 8B1–8B5, 8B8–8B11  
expenditures, 3A3, 8A1, 8A2  
hearing receipts, dispositions, claims pending, 2F9  
home health agencies and services, 8B1, 8B2, 8B9, 8C1, 8C3  
hospital charges, 8B8, 8B9  
hospital insurance, 2C1, 8A1, 8B1–8B5, 8B8, 8B8.1, 8C1–8C3  
hospitals (type of participating facility), 8B2, 8B8, 8B8.1, 8C1–8C3  
independent laboratories, 8B9, 8C1, 8C3  
outpatient services, 8B1, 8B2, 8B9  
participating facilities, 8C1–8C3  
persons served, 8B1, 8B2  
physicians' services, 8B1, 8B2, 8B9–8B11  
premiums, 2C1, 8A1, 8A2  
race, 8B4, 8B5  
reasonable charges, 8B11  
reimbursements, 8B1–8B11  
sex, 8B4, 8B5  
short-stay hospitals, 8B8, 8B8.1  
skilled nursing facilities and services, 8B8, 8C1, 8C3  
state data, 4B12, 8B3, 8B8, 8B8.1, 8B12, 8C2, 8C3  
Supplementary Medical Insurance, 2C1, 8A2, 8B1, 8B2, 8B4, 8B5, 8B9–8B12, 8C1, 8C3  
trust funds, 8A1, 8A2  
utilization, 8B1–8B5, 8B8–8B11  
workers, 4B12

Military personnel (see Uniformed services)

Minimum benefit (OASDI), 2A11, 2A17, 2A27, 2A28

Minimum wage, 2A26, 3B3

Minor children (OASDI) (see Children (OASDI), under age 18)

Mortality table (see Life table)

Mothers (OASDI) (see Widowed mothers and fathers (OASDI))

**N**

Noncitizens (SSI), 7E6

Nondisabled widows and widowers (OASDI) (see Widows and widowers, nondisabled (OASDI))

Nonprofit organizations, 2A1

Nursing facilities (Medicaid), expenditures for care, 8E1

**O**

Offices (SSA) and employees (SSA) (OASDI), 2F1–2F3  
data operations centers, 2F1  
field services locations, 2F1  
hearings and appeals, 2F1  
program service centers, 2F1  
regional offices, 2F1  
staff, 2F2, 2F3  
demographic characteristics of, 2F2  
employees with disabilities, 2F2  
grade levels of, 2F2  
size of, 2F3  
work years, total, 2F3

Old-Age and Survivors Insurance Trust Fund (OASDI) (see Trust Funds)	Windfall Elimination Provision (WEP), computation based on, 2A11.1
Old-Age Assistance, 3C4	Private social welfare expenditures, 3A4
Old-Age, Survivors, and Disability Insurance (OASDI) (see entries identified by (OASDI))	Prouty beneficiaries (OASDI) (see Special age-72 beneficiaries (OASDI))
Outpatient services (Medicare and Medicaid), 8B1, 8B2, 8B9, 8E1	Provisions, history of Medicaid, 2C2 Medicare, 2C1 OASDI, 2A1–2A32 SSI, 2B1
<b>P</b>	
Parents (OASDI), 2A22, 4A5, 5A1, 5A4–5A7, 5A10, 5F6, 5F7, 5G3, 5H2, 6A1, 6E4	
Pension offset, noncovered government, 2A22, 2A23, 6E4, 6E5	Public assistance (see Aid to Families with Dependent Children; Public social welfare expenditures)
Pensions private, 3A4 public employee, 3A3, 3C3	Public social welfare expenditures, 3A1, 3A3, 3C3
<b>Q</b>	
Period of disability, 2A7	Quarters of coverage (OASDI), 2A7, 2A18
<b>R</b>	
Physicians' services (Medicaid), 8E1	
Physicians' services (Medicare), 8B1, 8B2, 8B9–8B11	Race (OASDI) (see also specific types of OASDI benefits includ- ing: Children; Disabled widows and widowers; Disabled work- ers; Retired workers; Widowed mothers and fathers; Widows and widowers, nondisabled; Wives and husbands) age, 5A1, 5A3, 6A3 Medicare, 8B4, 8B5 poverty status of aged families, 3E6 sex, 5A1, 5A3, 5A7, 6A3 state data, 5J5.1 summary data, 3C7, 5A1, 5A6, 5A7, 6A3
Population in Social Security area, 4C5	
Poverty data age, 3E2 aged families, 3E3, 3E6 aged 65 or older, 3E1, 3E4 CPI, annual average, 3E1 family size, 3E8 family status, 3E2 living arrangements, 3E4, 3E6 nonaged family units, 3E3 poverty guidelines, 3E8 poverty thresholds, 3E1 race, 3E6 sex, 3E2, 3E4 shares of money income, sources of, 3E3 Social Security share of money income, 3E6	Race (SSI), 3C7
Primary insurance amount (OASDI) (see also specific types of OASDI benefits including: Children; Disabled widows and widowers; Disabled workers; Parents; Retired workers; Wid- owed mothers and fathers; Widows and widowers, nondis- abled; Wives and husbands) average indexed monthly earnings, 2A10, 2A11 average monthly wage, 2A10, 2A15–2A17 benefit increases, effects of, 2A11, 2A13–2A19 formulas for computing, 2A11, 2A12, 2A15–2A19 illustrative amounts, 2A26 indexing factors and indexed earnings, 2A8, 2A9 maximum indexed earnings, 2A9 minimum and maximum benefit, 2A11, 2A13, 2A14, 2A17, 2A26–2A28 percent of for benefit types, 2A20–2A22 relationship to earnings levels, 2A26 special minimum, 2A12, 5A8	Railroad Retirement program social welfare expenditures for, 3A3 source of funds for, 3C3 trust fund transfers to and from, 4A1–4A3, 8A1
	Railroad temporary disability insurance program, 3A3, 9C1
	Railroad unemployment insurance program, 3A3
	Reconsiderations (OASDI and SSI), 2F7
	Reduction for early retirement (OASDI) age, 5A3, 5B1, 5B2, 6A5 benefit amounts, illustrative, 2A26 disabled workers, 5A3, 6A5 minimum and maximum benefit, 2A27 race, 5A3, 5A7 retired workers dually entitled, 5G1 with benefits withheld, 6B1, 6E1 with delayed retirement credit, 5B1, 5B3 with reduction, 5A3, 5B6–5B8, 5G1, 5H2, 6A5, 6B3, 6B4, 6E1

without delayed retirement credit, 5B2, 5B3  
without reduction, 5B1, 5B2, 5B6–5B8, 5G1, 5H2, 6B3, 6B4,  
6E1  
sex, 5A3, 5A7, 5B1, 5B2, 5B6–5B8, 5G1, 6A5, 6B3, 6B4  
widows, nondisabled, 5A3, 6A5  
wives and husbands, 5A3, 5A7, 6A5

Religious personnel, 2A1

Representative payment (OASDI), 5L1

Representative payment (SSI), 7E4

Retired workers (OASDI)

age, 5A1, 5A3, 5A5, 5A10, 5A15, 5A16, 5B5, 5B9, 6A4, 6A5,  
6B5  
awards, 6A1–6A5, 6B1, 6B3–6B5  
beneficiary families, 5H1–5H3  
benefit distributions, 5B6, 5B7, 5B9, 5J6, 6B3, 6B4, 5H3  
benefits in current and constant dollars, 3C4  
benefits paid  
    annual, 4A5  
    monthly, 5A4, 5A16, 5J4, 6A6  
benefits withheld, 6E1, 6E4  
benefits withheld due to earnings, 6B1  
computation of benefits, worksheet for (see the subsection  
    "Computing a Retired-Worker Benefit" in the "Social Security:  
    History of Provisions" section.)  
disability conversions, 6A4  
foreign countries, 5J11  
newly entitled, 6A4  
primary insurance amount, 5B1, 5B2, 5B7, 5C1, 5G1, 5H1, 6A2,  
6B1, 6B4  
    special minimum, 5A8  
qualifications for benefits, 2A20  
race, 5A1, 5A3, 5A6, 5A7, 6A3  
sex, 5A1, 5A3, 5A7, 5A10, 5A15, 5A16, 5B6–5B9, 5C2, 6A2–  
6A5, 6B1, 6B3–6B5, 6E4  
state data, 5J2, 5J4, 5J6, 6A6  
terminations, 6F1, 6F2  
with delayed retirement credit, 5B1–5B3  
with dual entitlement, 5G1–5G5  
with reduction for early retirement, 5A3, 5B6–5B8, 5G1, 5H2,  
6B1, 6B3, 6B4, 6E1  
without reduction for early retirement, 5B1, 5B2, 5B6–5B8, 5G1,  
5H2, 6B1, 6B3, 6B4, 6E1  
year of entitlement, 5B4

Retirement programs (see Pensions; Railroad Retirement pro-  
gram; Retired workers (OASDI))

Retirement test (see Earnings test (OASDI))

## S

SECA taxes (see Contribution rates (OASDI))

Section 1619a (see Special SSI cash payments (1619a) (SSI))

Section 1619b (see Continuation of Medicaid coverage (1619b)  
(SSI))

Self-employed workers (see also Covered workers (OASDI);

Earnings of covered workers (OASDI))  
age, 4B8  
contribution rates, 2A3  
earnings, 4B2–4B4, 4B9–4B12  
maximum annual amount of contributions, 2A4  
maximum taxable earnings, 2A3  
Medicare, 4B12  
OASDHI contributions, 2A4, 2A5, 4B10, 4B11  
sex, 4B3, 4B4, 4B9  
state data, 4B10, 4B12  
tax credits, 2A5, 2A6  
taxable earnings, amount reported, 4B2, 4B10–4B12  
with earnings above maximum taxable, 4B9  
with earnings below maximum taxable, 4B4, 4B9

Service delivery (OASDI and SSI)

accuracy rates, payment, 2F7  
allowances, 2F7  
denials, 2F7  
disability determinations, 2F7  
800 number (1-800-772-1213)  
    average waiting time, 2F7  
    calls received, 2F7  
excess payments, 2F7  
OASI payments, 2F7  
reconsiderations, 2F7  
reversals of denials, 2F7  
SSI payments, 2F7  
underpayments, 2F7

Sex (OASDI) (see also specific types of OASDI benefits including:  
Children; Disabled widows and widowers; Disabled workers;  
Retired workers; Widowed mothers and fathers; Widows and  
widowers, nondisabled; Wives and husbands)

age, 3C8, 5A1, 5A10, 5A15, 5A16, 6A3  
life table, 4C6  
race, 3C7, 5A1, 5A7, 6A3  
state data, 5J5.1  
summary data, 5A1, 5A7, 5A16, 6A3

Sex (SSI) (see Supplemental Security Income)

Short-term sickness and disability benefits, 3A4, 9C1

Skilled nursing facilities (Medicare)

expenditures for care, 8B1, 8B2, 8B8  
participating facilities, 8C1, 8C3

Social insurance programs, summary data, 3C3

Social Security Act, 2A1, 2A2, 2A6, 2A7, 2A10–2A18, 2A20–  
2A25, 2A29, 2A31, 2B1

Social Security program (see Entries identified by (OASDI))

Social welfare expenditures, 3A1, 3A3, 3A4, 3C3

Special age-72 beneficiaries (OASDI), 2A24, 4A5, 5A1, 5A4–5A7,  
5A10, 5H2, 5K1, 5L1, 6A1, 6E4, 6F1, 6F2

Special minimum primary insurance amount (OASDI), 2A12, 5A8

Special SSI cash payments (1619a) (SSI), 7F3–7F5

Spouses (OASDI) (see Wives and husbands (OASDI))

Staff (OASDI) (see Offices (SSA) and employees (SSA) (OASDI))

State and local government pensions (see Government workers)

State data

- Aid to Families with Dependent Children, 9G1, 9G2
- Black Lung benefits, 9D2
- Low-Income Home Energy Assistance, 9J1, 9J2, 9J3
- Medicaid, 2C2, 8H1
- Medicare, 4B12, 8B3, 8B8, 8B8.1, 8B12, 8C2, 8C3
- OASDI
  - beneficiaries, 3C5, 5J1–5J6, 5J8–5J10, 5J14, 6A6
  - concurrent receipt with SSI, 3C5, 7D2
  - covered workers, 4B10, 4B12
  - diagnoses, 5J12, 5J13
  - monthly benefits of disabled beneficiaries, 5J14
  - taxable earnings, 4B10, 4B12
- SSI
  - concurrent receipt with OASDI, 3C5, 7D2
  - Medicaid, 2C2
  - recipients, 3C5, 7B1–7B3, 7B7–7B9, 7D2, 7F5
- Temporary Assistance for Needy Families (TANF), 9G2
- Unemployment Insurance, 9A2
- Workers' compensation, 9B1–9B3

State Supplementation (see Supplemental Security Income (SSI))

Students (OASDI) (see Children (OASDI))

Substantial gainful activity, 2A30

Supplemental Security Income (SSI)

- adults, 7C1, 7E2, 7E3
- age, 3C7, 3C8, 7A1, 7A8, 7A9, 7B9, 7D1, 7D2, 7E2–7E5, 7F1, 7F2, 7F4
- aged, 3C5, 7A1–7A5, 7A8, 7A9, 7B1, 7B2, 7B9, 7C1, 7C2, 7D1, 7D2, 7E2–7E5
- awards, 7A8, 7B9, 7E2
- benefit rates, 2B1
- benefits in current and constant dollars, 3C4
- blind, 7A1–7A5, 7A8, 7A9, 7B1, 7B2, 7B8, 7B9, 7C1, 7C2, 7D1, 7D2, 7E2–7E5, 7F1
- blind and disabled adults, 3C6.1, 7C1, 7F1, 7F2
- blind and disabled children, 3C6.1, 7A2, 7B8, 7C1, 7E2–7E4, 7F1, 7F2
- civil litigation, 2F10
- claims workloads, 2F6
- concurrent SSI and OASDI, 3C5, 3C6, 3C6.1, 7D1, 7D2
- continuation of Medicaid coverage (1619b) (SSI), 7F3–7F5
- couples, 7A2, 7C2
- diagnostic group, 7F1, 7F2
- disabled, 3C6.1, 7A1–7A5, 7A8, 7A9, 7B1, 7B2, 7B9, 7C1, 7C2, 7D1, 7D2, 7E2–7E5, 7F1
- earnings, 7D1, 7F4
- 800 number (1-800-772-1213)
  - average waiting time, 2F7
  - calls received, 2F7
- federal SSI payments, 7A1–7A5, 7B3, 7B7
- federally administered payments, 3C6.1, 7A1–7A5, 7A8, 7A9, 7B1, 7B3, 7B7
- hearing receipts, dispositions, claims pending, 2F9
- Hispanic origin, 3C8
- income, 7D1
- living arrangements, 7E5
- noncitizens, 7E6
- OASDI (received concurrently with SSI), 3C5, 3C6, 7D1, 7D2
- payment distributions, 7C1, 7C2
- payments in current and constant dollars, 3C4
- race, 3C7
- representative payment, 7E4
- service delivery, 2F7
- sex, 3C7, 3C8, 7E2, 7E3, 7F2
- special SSI cash payments (1619a), 7F3–7F5
- state data, 3C5, 7B1–7B3, 7B7–7B9, 7D2, 7F5
- state supplementation, 7A1–7A5, 7B2, 7B3, 7B7
- unearned income, 7D1, 7F4

Supplementary Medical Insurance (SMI) (see Medicare)

Supplementary Medical Insurance (SMI) Trust Fund (see Trust Funds)

Survivor benefits (OASDI) (see Children (OASDI); Dependents and survivors; Disabled widows and widowers; Parents; Widowed mothers and fathers; Widows and widowers; Widows and widowers, nondisabled)

**T**

Tax credits (OASDI), 2A5, 2A6, 3C3

Taxable earnings (OASDI), 2A3, 2A4, 2A8, 2A9, 2A18, 2A26, 4B1, 4B2, 4B10–4B12 (see also Earnings of covered workers (OASDI))

Taxable maximum (OASDI), 2A3, 2A4, 2A8, 2A9, 2A18, 2A26, 4B4, 4B7, 4B9 (see also Covered workers (OASDI))

Taxation of OASDI benefits, 2A31, 2A32, 3C3, 4A1–4A3

Taxes (OASDI and HI)
 

- amounts, 4A1–4A3, 4B10–4B12
- rates, 2A3, 2A4
- state amounts, 4B10, 4B12

Temporary Assistance for Needy Families (TANF), 3C4, 9G1, 9G2

Temporary disability insurance, 3A3, 9C1

Termination of benefits (OASDI), 6F1–6F3

Time-series data (see Historical data)

Totalization (OASDI), 5M1

Transitionally insured (OASDI), 2A23

---

Trust Funds

Disability Insurance, 3C3, 4A2–4A4, 4A6, 5A4  
Hospital Insurance, 3C3, 4A4, 8A1  
Old-Age and Survivors Insurance, 3C3, 4A1, 4A3–4A5, 5A4  
Supplementary Medical Insurance, 3C3, 4A4, 8A2

**U**

Underpayments (OASDI and SSI), 2F7

Unemployment Insurance, 3A3, 9A2

Uniformed services, 2A1, 2A2

**V**

Veterans' programs, 3A1, 3A3, 9F1

Vocational rehabilitation services, 2A25

**W**

Wage and salary workers (OASDI) (see Covered workers (OASDI); Earnings of covered workers (OASDI))

Wage credits (OASDI), 2A1, 2A2, 2A6

Widowed mothers and fathers (OASDI)

age, 5A1, 5A5, 5A16, 6A3, 6D7  
awards, 6A1, 6A3, 6D6, 6D7  
beneficiary families, 5H1–5H2, 5H4  
benefit distributions, 5H3  
benefits in current and constant dollars, 3C4  
benefits paid  
    annual, 4A5  
    monthly, 5A4, 5A16, 5F6  
benefits withheld, 6E4  
entitlement based on disabled child, 5F12, 6D6  
primary insurance amount, 5F7, 5H2  
    special minimum, 5A8  
qualifications for benefits, 2A22  
race, 5A1, 5A6, 5A7  
sex, 5A1, 5A7, 5A16  
surviving divorced, 5A1, 5F12, 6D6, 6D7  
terminations, 6F1, 6F2

Widows and widowers (OASDI)

benefits paid  
    annual, 4A5, 4A6  
    monthly, 5A4, 5A16, 5A17, 5F1  
benefits withheld, 6E4  
foreign countries, 5J11  
qualifications for benefits, 2A22, 2A23  
state data, 5J2, 5J4  
terminations, 6F1, 6F2

Widows and widowers, disabled (see Disabled widows and widowers (OASDI))

Widows and widowers, nondisabled (OASDI)  
age, 5A1, 5A3, 5A5, 5A10, 5A15, 5A16, 5F11, 5F13, 6A3, 6D7

awards, 6A2, 6A3, 6D7, 6D8  
beneficiary families, 5H1, 5H2, 5H4  
benefit distributions, 5F11, 5H4, 5J9  
benefits paid, monthly, 5A16, 5A17, 5F8, 5F13  
dually entitled, 5A14, 5A15, 5G2–5G5  
limitation of benefit, 5F13  
primary insurance amount, 5F7, 5H2  
    special minimum, 5A8  
qualifications for benefits, 2A22, 2A23  
race, 5A1, 5A3, 5A6, 5A7, 6A3  
sex, 5A1, 5A3, 5A7, 5A10, 5A16, 5F6, 5F8, 5F11, 6A3, 6D7  
state data, 5J9  
surviving divorced, 5A1  
with reduction for early retirement, 5A3, 5F13, 6A5  
without reduction for early retirement, 5F13  
year of entitlement, 5F9

Windfall elimination provision (WEP), 2A11.1

Withheld benefits (OASDI)

by reason and type of benefit, 6E4, 6E5  
of retired workers, 6E1

Wives and husbands (OASDI)

age, 5A1, 5A3, 5A5, 5A10, 5A15, 5A16, 6A3, 6A5, 6D3  
awards, 6A1, 6A3, 6A5, 6D1, 6D3  
beneficiary families, 5H1–5H3  
benefit distributions, 5F3, 5H3  
benefits paid  
    annual, 4A5, 4A6  
    monthly, 5A4, 5A16, 5F1  
benefits withheld, 6E4, 6E5  
divorced, 5A1, 6D3  
dually entitled, 5A14, 5A15, 5G2–5G5  
entitlement based on age, 5A7, 5C2, 5F1, 5F3, 6A3, 6D1, 6D3  
entitlement based on care of children, 5A7, 5C2, 5F1, 6A3, 6D1, 6D3  
foreign countries, 5J11  
of disabled workers, 5A1, 5A5–5A7, 5A16, 5C1, 5F1, 6A1, 6A3, 6A5, 6D1, 6D3  
of retired workers, 5A1, 5A5–5A7, 5A16, 5C1, 5F1, 6A1, 6A3, 6A5, 6D1, 6D3  
primary insurance amount, 5C1, 5H1  
    special minimum, 5A8  
qualifications for benefits, 2A21, 2A23  
race, 5A1, 5A3, 5A6, 5A7, 6A3  
sex, 5A1, 5A3, 5A7, 5A10, 5A16, 5C2, 6A3, 6D1  
state data, 5J2, 5J4  
terminations, 6F1–6F3  
with entitlement based on disabled child, 5A7, 5F1  
with reduction for early retirement, 5A3, 5A7, 6A5

Workloads (OASDI and SSI), 2F4–2F6, 2F8

Workers' compensation, 3A3, 9B1–9B3

Workers' compensation offset, 6E4, 6E5